

Workflow Documentation — AI Lead Qualification & Automation System

This workflow automates the entire lifecycle of an incoming lead: Receive message → Extract data → Score lead → Send email → Log → Calendar event → Handoff to human.

1. Trigger — “When chat message received”

Starts when a chat message arrives. Feeds input to the first AI Agent.

2. AI Agent — Lead Analyzer

Performs entity extraction, lead enrichment, fit score, intent score, lead score + temperature, email generation, and outputs structured JSON.

3. Structured Output Parser

Validates JSON into required schema.

4. Switch Node — Routes Based on Lead Temperature

Hot → AI Agent1

Warm → Email + Logging

Cold → Email + Logging

HOT Lead Path:

- AI Agent1 generates lead summary & suggested human prompt.
- Calendar event auto-created (now +2 hr to +3 hr).
- Email sent to lead.

WARM & COLD Lead Path:

- Email sent to lead.
- Log added to Google Sheet (timestamp, workflow ID, email, message).

End of Workflow:

Fully automated lead scoring, emailing, event scheduling, and logging.

Summary Diagram:

Chat Message → AI Agent → Parser → Switch → (Hot/Warm/Cold branch handling)