Core Logic & Problem-Solving Demonstration

System: Cervoa – End-to-End Agentic Sales Automation
Orchestration Layer: n8n

1. Problem Being Solved

Modern sales teams suffer from:

- Fragmented tools (lead gen, CRM, email, scheduling, proposals, payments)
- Static automation (linear workflows that don't adapt)
- Manual handoffs between sales → ops → delivery

Goal: Build a single, agentic, event-driven system that:

- Thinks before acting (decision-based routing)
- Reacts to real user behavior (opens, clicks, replies, payments)
- Scales without re-architecture

2. Design Philosophy

Agentic, Not Linear

Instead of a single long automation, the system is composed of **decision points**:

- Each lead is evaluated multiple times
- Scores and segments evolve with behavior
- Actions are triggered by events, not fixed schedules

Centralized Intelligence

- All decisions live in **n8n code nodes**
- Tools are replaceable; logic is not
- Airtable acts as the system of record, not the brain

3. Phase-Wise Core Logic

Phase 1: Lead Discovery & Enrichment

Triggers

- Daily Schedule (8 AM UTC)
- Manual Apollo Search Form (ICP input)

Logic

1. Merge scheduled + manual triggers
2. Prepare Apollo payload with defaults or user-defined ICP
3. Fetch leads from Apollo

4. Normalize raw lead data
5. Enrich leads using Clay (revenue, funding, tech stack, decision-maker)

Problem Solved
Ensures consistent, repeatable lead discovery with flexible ICP control.

Phase 2: Dynamic Scoring & Validation (Agent Core)

A. Dynamic Scoring (0–100)

Scoring is **multi-factor**, not rule-based only:

- Company size & revenue
- Funding signals / recent news
- Industry relevance (exact vs adjacent)
- Role seniority
- Profile completeness

Outcome:

- Hot ≥ 70
- Warm 50–69
- Cold < 50

B. Quality Validation

Leads must pass **minimum quality gates**:

- Valid email
- Company active
- ICP industry match
- Minimum company size

Decision Paths

- Qualified → CRM (Airtable)
- Low quality → Archived
- Suspicious data → Manual review queue

Problem Solved
Prevents bad data from entering campaigns and wasting spend.

Phase 3: Campaign Routing (Decision-Based)

Based on segment:

- **Hot:** Immediate outreach + aggressive follow-ups
- **Warm:** Nurture cadence
- **Cold:** Long-term value drip

Campaigns are **triggered**, not batched.

Phase 4: Engagement Tracking & Re-Scoring

Webhook-driven events (from Brevo / SendGrid):

- Open → +5 to +10
- Click → +10
- Reply → +20 + promote to Hot
- Hard bounce → mark invalid + stop campaigns

Key Insight
A Cold lead can become Hot without human intervention.

Phase 5: Meeting Scheduling Automation

Trigger: Lead replies or requests meeting

Logic

Fetch available Calendly slots

Send personalized email with 3–5 options

On booking:

- Auto-create Zoom meeting
- Sync Google Calendar
- Send confirmation + agenda
- Update Airtable stage

Problem Solved
Eliminates back-and-forth scheduling and manual confirmations.

Phase 6: AI Voice Agent (Conditional)

Voice is introduced **only when valuable**:

- Inbound intent
- Missed replies
- High-value Hot leads

This avoids unnecessary call costs.

Phase 7: Proposal Generation (Gamma)

Trigger: Meeting completed or explicit request

Logic

- Build structured prompt from Airtable fields
- Generate proposal via Gamma
- Poll until ready
- Update CRM with proposal status

Problem Solved
Reduces proposal creation time from hours to minutes.

Phase 8: Payments & Pipeline Tracking

Stripe Webhooks

- Invoice paid → move to Delivery
- Payment failed → reminder + retry path

Pipeline state is always event-accurate.

Phase 9: Delivery Automation

On Payment:

- Create client user
- Grant portal access
- Send welcome email
- Move deal to "In Delivery"

No manual ops handoff required.

Phase 10: Social Automation (Optional)

On Closed-Won:

- Generate LinkedIn / X / Instagram posts via LLM
- Schedule posts
- Log activity

Sales success feeds marketing automatically.

Phase 11: Feedback Loop & Optimization

Weekly Cron Job

- Calculate leads, wins, revenue, close rate
- Evaluate engagement & response rates
- Generate optimization suggestions

Example Logic

- Low close rate → improve qualification
- Low engagement → adjust copy or cadence

Reports are sent via Slack & Email.

4. Failure Handling & Safeguards

- Email bounces immediately suppress leads
- Suspicious data routed to manual review
- External API failures isolated per phase
- Idempotent updates in Airtable

5. Why This Scales

- n8n logic remains constant
- Tools can be swapped without redesign
- Multi-client ready
- Supports higher volumes by adjusting thresholds, not flows

6. Key Takeaway

> *This system does not just automate tasks — it **makes decisions**, reacts to outcomes, and continuously improves itself.*

That is the core of the agentic design.