

Automation Title -- AI-Powered Client Summary & CRM Sync

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Category - Sales Automation / Lead Management

Detailed Description

This automation processes new client inquiries submitted through a Google Form and converts them into structured CRM-ready summaries using Google Gemini AI. Instead of manually reading long responses and typing notes into a CRM, this workflow automatically summarizes the client's project request, checks whether the lead already exists, and updates or inserts the record into Airtable.

Businesses often struggle with unorganized incoming requests. Messages pile up in spreadsheets, emails get lost, and sales teams waste time reading through long, unstructured messages. This automation solves that problem by transforming every new lead into a clean, structured, AI-analyzed record the moment they submit a form.

The summary includes project type, goals, budget, timeline, and missing information — giving you a quick snapshot of every lead's context and quality. Airtable then becomes a centralized CRM where all client information stays clean, deduplicated, and always up-to-date.

This workflow improves lead qualification, speeds up follow-up time, reduces manual tasks, and produces a professional AI-powered system that strengthens your automation portfolio.

How It Works (Functionality)

1. Trigger — Google Forms (via Google Sheets Watch New Rows)

Every time a client submits the Google Form, Google Sheets adds a new row.

Make watches for new rows and triggers instantly.

2. Action — Gemini AI Summarizes the Client Message

The workflow sends the client's full message into Gemini 1.5 Flash-8B.

Gemini returns a structured summary including:

- Project Type
- Goals
- Timeline
- Budget (if mentioned)
- Missing or unclear information

3. Action — Airtable Search Records

The automation checks whether a lead with the same email already exists using a formula filter.

This prevents duplicates and ensures accurate lead tracking.

4. Action — Airtable Upsert Record

If email already exists → the record is updated.

If it's a new email → a new CRM entry is created.

Stored fields include:

- Name
 - Email
 - Full Message
 - AI Summary
 - Date
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Tools Required

- **Make.com** (automation builder)
 - **Google Forms** (client intake form)
 - **Google Sheets** (stores form responses)
 - **Gemini AI (via Google AI Studio)**
 - **Airtable** (CRM database)
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Size of Project

Medium (4 modules)

- Trigger
 - AI Processing
 - Search
 - Upsert
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Setup Requirements

Integrations Needed:

- Connect Google Sheets to Make.com
- Connect Google AI Studio (Gemini) to Make.com
- Connect Airtable API key to Make.com

Airtable Table Must Include:

- Name
- Email
- Full Message
- AI Summary
- Created Time

Configuration Notes:

- Search module uses formula:

- {Email} = "mappedEmailField"
 - Upsert module uses **Email** as the unique matching key.
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Deployment Time Estimate

2–3 hours

(including creating the Airtable base + mapping fields + testing)

Value Proposition

This automation provides immediate business value in lead management:

Time Savings

- Manual reading + summarizing saved: 3–5 minutes per lead
- 100 leads/month → **5+ hours saved monthly**

Data Consistency

- Removes duplicates
- Ensures structured CRM data
- Automatically enriches records with AI summaries

Faster Lead Response

Teams respond faster because summaries are instantly clear.

Cost Savings

- Gemini Flash-8B is extremely cost-efficient
- CRM upkeep becomes nearly automatic

Estimated monthly ROI:

- **₦40,000–₦60,000 in saved labor**
 - **₦5,000–₦10,000 in automation costs**
→ Net ROI ≈ 5x to 8x
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Demo Video (Suggested)

Record a short walkthrough showing:

1. A new Google Form submission
2. The Make scenario running each module
3. Airtable updating automatically with summary

This strengthens your automation portfolio.

Known Limitations

- Google Forms → Sheets update may take a few seconds

- Airtable free tier has record limits
 - If email field is empty, upsert cannot match
 - Gemini output depends on message clarity
 - Formula must be written correctly to avoid search errors
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Testimonials / Use Cases

- Perfect for solo founders managing many inquiries
 - Great for agencies collecting project briefs
 - Scales well for customer support and sales teams
 - Excellent for automation portfolios showcasing AI integrations
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Size Classification

Medium

(4 modules with conditional logic and upsert functionality)

Estimated ROI

Example monthly estimate:

- 150 submissions
 - 4 minutes saved per lead → 10 hours saved
 - Hourly rate: ₦10,000
Savings: ₦100,000
Costs: ₦10,000
Net ROI: ₦90,000/month
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Version & Updates

v1.0 — Initial Release

- Google Forms → Sheets → Gemini → Airtable Upsert

v1.1 — Improved Summary Prompt

- Added missing-info detection
- Cleaner structured output

v1.2 — Duplicate Lead Protection

- Airtable search formula optimized
- Email-based upsert added