

# Lead Intake Triage Workflow

## Self-built proof-of-work case study for AI workflow automation

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Many small teams lose revenue because new leads land in forms, inboxes, spreadsheets, or CRMs without a clear same-day triage process. This proof artifact shows how I would structure a safe first automation pilot with synthetic data, placeholder endpoints, and a deterministic local simulator.

Webhook	100	Human Review	\$750-\$1,000
lead intake	sample score	before sending	pilot range

### Goal

- Turn a new lead payload into a priority score, score reasons, lead brief, recommended next action, CRM/task payload, and safe reply draft.
- Separate deterministic business rules from AI-generated text.
- Require human review before any customer-facing message.

### Workflow

- Webhook receives lead payload.
- Normalization keeps required fields.
- Scoring checks urgency, budget, booking impact, requested outcome, and integration-friendly tools.
- AI brief placeholder prepares an internal summary with guardrails.
- Routing sends hot leads to same-day follow-up.
- CRM/task placeholder creates an action item.

### Guardrails

- OpenAI node is a placeholder until credentials and prompt rules are approved.
- CRM endpoint uses example.invalid intentionally.
- Sample data is synthetic.
- Sensitive production data is out of scope until access rules are written down.

### Sample Result

Input: Northline Dental wants missed-call follow-up and booking automation this month.

- Priority: hot.
- Score: 100.
- Reasons: urgent timeline, paid-pilot budget fit, booking/revenue impact, specific outcome, integration-friendly tools.
- Next action: offer a narrow paid pilot using sample data and human-reviewed draft replies.

### Proof Files

- n8n-lead-intake-triage.workflow.json
- simulate-lead-triage.mjs
- sample-lead.json
- expected-output.json
- ai-automation-proof-workflows.zip

### Client Pilot Path

- Confirm one workflow owner.
- Use sample or sanitized leads first.
- Replace placeholders with approved tools such as HubSpot, Airtable, Google Sheets, Slack, Salesforce, or an internal API.
- Add logging, duplicate handling, and error visibility.
- Deliver handoff notes and expansion recommendations.

### Scope

- Starter pilot: one input source, one output destination, sample data, basic logging, human-reviewed drafts, handoff notes.
- Suggested first milestone: \$750-\$1,000.
- Core buildout with multiple integrations or deeper error handling: \$2,500.

Honesty note: this is a self-built proof artifact, not a client deployment or production n8n system. It is intended to show workflow architecture, testability, AI guardrails, and paid-pilot scoping.