AI BASICS // CASE STUDY

Automating lead qualification with n8n and Gemini

Recovering sales velocity: how we turned lead triage from a guessing game into a system that reasons.

> **Travis's short version:** hundreds of leads flood the CRM and someone has to guess which are hot and which are a time trap. We built a system that pulls each lead in, scores it with Gemini, and routes it to the right next step, all while keeping the personal touch.

The problem: lead triage

It's a pain point pretty much every sales team faces. Hundreds of leads land in the CRM and someone has to decide whether each one is a hot opportunity or simply a time trap. When velocity and quality directly affect revenue, that guesswork becomes very expensive. What teams need is a way to filter out the noise and surface the real opportunities, while still maintaining personal rapport.

The build: data, brain and muscle

We think of the architecture as a sequence of challenges we've solved. Put together, they make a powerful outcome.

Layer	Role	How we built it
Data	Ingestion	Pulls unstructured leads straight from Salesforce, with guardrails so nothing is double processed. That keeps costs down, which matters a lot in AI systems.
Brain	Reasoning	Gemini scores each lead on three things: **fit**, **intent** and **urgency**, turning unstructured data into structured decisions.
Muscle	Execution	Hot leads are routed instantly to Slack for the sales team. Warm and cold leads get a personalised email that keeps the door open.

The tool stack

1. **n8n is the orchestrator.** The command centre where the workflow logic lives and all the other tools are coordinated.
2. **Salesforce is the CRM and data source.** It's where the leads live, and we can pull data out and push scores back in.
3. **Gemini is the brain.** It summarises the inquiry, finds out more about the company and scores the lead.
4. **Slack and Gmail are the execution layer.** Slack alerts the team on hot leads. Gmail handles the personalised outreach.

Under the hood

Data. A trigger node checks Salesforce every minute for new leads. Think of the connection as a handshake: Salesforce lets n8n pull and push data, but only with the right credentials, an API key, which works like a digital contract. We pull the name, company and description of the inquiry, and the system knows which leads it has already processed.

Brain. A system prompt has Gemini score each lead on intent, urgency and fit, on a one to five scale. That gives a fairly objective view of hot, warm or cold. It also produces a short **triage summary** so the sales team doesn't read every detail, a **priority rating**, and an **email hook**: a personalised reference taken from the inquiry for later outreach. A small piece of code structures the text into scores, and includes a backstop: if fit is below two, the lead is automatically cold. The results are pushed back to Salesforce.

The result: three routes

Hot and warm

Hot: a trigger goes straight to Slack with the fit score and an AI summary, so the team can jump into Salesforce and make contact immediately.

Warm: a personalised email invites the lead to book a 10 to 15 minute coffee chat. It puts the ball in their court and reduces calendar congestion.

Cold and timing

Cold: we don't want to shut the door on any lead, so the same personalised hook goes out with a strategy PDF. If they like what they see, they can come back.

Timing: wait nodes add a 15 and 20 minute delay to the warm and cold emails, so the response feels read and personalised.

Beyond sales

The data, brain and muscle framework drops into any high-volume workflow. In real estate, Gemini scores buyers on readiness and budget, then books viewings. In customer success, it reads the sentiment of a complaint and sends the serious ones to Slack. In HR and recruiting, it assesses applications against the job description, ranks candidates and sets up interviews for the top ones.

The bottom line

Stop asking "how do I do this task?" and start asking **"how do I architect a system to handle this task at scale?"** The system handles the noise while your people focus on the relationships that generate value. It isn't just automation, it's designing how your business thinks.

Want to talk this through for your business?

Book a free 15-minute call. We'll look at your situation and give you a straight answer, with no jargon and no sales pitch.

Let's Chat

Opens the request form on our website. Free, no obligation.