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AI Lead Management System

Delivery Pack

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VERSION 1.0

1. System Overview

System Name

AI Lead Management System

Purpose

Capture, qualify, summarize and follow up with leads using a clear AI-supported workflow.

Primary Users

Business owner, sales team, marketing manager, CRM owner or business development lead.

Expected Benefit

Faster lead response, clearer prioritization, better handover to sales and more consistent follow-up.

2. Business Problem

❌ Before

Leads arrived from different sources without a consistent way to summarize, qualify, prioritize, or follow up.

- No standardized intake process
- Unclear lead prioritization
- Inconsistent follow-up
- Information scattered across channels

✅ After

The new system gives the team a repeatable process for turning raw lead information into clear next actions.

- Consistent lead capture workflow
- AI-supported qualification and summary
- Clear prioritization criteria
- Structured handover to sales

3. Workflow Map

Step	Action	Output
1	Capture lead information	Lead intake record
2	Summarize the inquiry	Clean lead summary
3	Qualify the lead	Fit assessment and priority
4	Define next best action	Recommended response path
5	Draft follow-up message	Human-reviewed response
6	Update tracker or CRM	Lead status, owner and next step
7	Monitor progress	Follow-up discipline and pipeline visibility

4. Tools Used

- ChatGPT or Claude for lead summaries, qualification support and follow-up drafts.
- Google Sheets, Microsoft Excel, Notion or CRM for lead tracking.
- Email, LinkedIn or CRM messaging for follow-up communication.
- Google Drive, OneDrive or internal workspace for templates and SOPs.
- Optional: website forms, automation tools or CRM integrations if agreed separately.

5. Prompt Library

Prompt 1 — Lead Intake Summary

Use this prompt when a new lead comes in and you want to turn raw information into a clean internal summary.

Act as a sales operations assistant. Based on the lead information below, create a structured summary with: lead source, company/person context, stated need, urgency, potential value, missing information and recommended next step. Keep the summary factual and concise. Do not assume information that is not provided.

Paste inputs: lead source, name/company, message, industry, requested service, budget indication, timeline, contact details and notes.

Prompt 2 — Lead Qualification

Assess this lead based on the qualification criteria below. Classify the lead as High Fit, Medium Fit or Low Fit. Explain the reasoning, highlight missing information and recommend whether the next step should be: book a call, ask for more details, send information, nurture or reject politely.

Prompt 3 — Next Best Action

Based on the lead summary and qualification result, recommend the next best action. Include the action owner, suggested response timing, key message angle and any information that must be clarified before moving forward.

Prompt 4 — Follow-Up Message

Write a professional follow-up message for this lead. The message should acknowledge the inquiry, show understanding of the need, suggest a clear next step and maintain a helpful, business-oriented tone. Keep it concise and avoid exaggerated promises.

Prompt 5 — CRM / Tracker Notes

Summarize this lead for CRM or tracker entry. Include: lead source, need, fit level, urgency, suggested next action, owner, follow-up date and notes for the sales team.

6. SOP — How To Use The System

1. When a new lead arrives, collect the available information in the lead intake template.
2. Run the Lead Intake Summary prompt.
3. Review the summary and add any missing business context.
4. Run the Lead Qualification prompt using the agreed criteria.
5. Review the fit level and next-best-action recommendation manually.
6. Create the follow-up message using the Follow-Up Message prompt.
7. Edit the message to match company tone and specific context.
8. Update the lead tracker or CRM with status, owner and next action.
9. Set a follow-up date and review open leads regularly.

7. Quality Control Checklist

- Lead details are accurate.
- The lead source is recorded.
- The stated need is summarized correctly.
- Fit level is reviewed by a human.
- Missing information is clearly identified.
- The follow-up message is specific and professional.
- No unsupported promises are included.
- The lead has an owner and next action.
- The CRM or tracker has been updated.

8. Lead Tracker Fields

- Date received
- Lead source
- Name / company
- Contact details
- Industry
- Need / request
- Fit level
- Urgency
- Owner
- Status
- Next action
- Follow-up date
- Notes

9. Example Output Structure

- Lead Summary
- Need and Context
- Fit Assessment
- Missing Information
- Recommended Next Action
- Follow-Up Message Draft
- CRM / Tracker Notes

10. Team Training Notes

The team should use AI to structure and accelerate lead handling, not to replace sales judgment. Final prioritization and client communication remain human-reviewed.

- Use clear lead information as input.
- Do not paste unnecessary sensitive data.
- Check fit, urgency and next action manually.
- Keep qualification criteria updated.
- Review open leads on a fixed cadence.
- Improve prompts based on real follow-up examples.

11. First 30 Days

- Use the system for every new inbound or referred lead.
- Track response time and lead status.
- Collect cases where qualification was unclear.
- Update the criteria and prompts based on recurring patterns.
- Review adoption after 2–3 weeks and improve the SOP.

12. Next Steps

Recommended next step: Use this system consistently for one lead cycle, then review whether it should connect with proposal creation, content workflows or KPI reporting.

The Next Step

Thank you for exploring the AI-Powered Lead Management System. I'm confident it will transform your lead management process, driving increased efficiency and growth.

I'd love to schedule a follow-up call with you – whether to review the results of your first lead cycle or to discuss expanding the system to other areas, such as proposal creation, content workflows, and KPI reporting.

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