

OWN SYSTEM

AI PIPELINE

Near-Zero Lead Pipeline

Business Operations

A complete intake-to-proposal system that ensures every inquiry gets a fast, relevant, personal response. AI handles the coordination so every conversation gets the attention it deserves, at near-zero running cost.



~\$0

RUNNING COST

<60s

FIRST RESPONSE

AI

COORDINATION

<p>TIMELINE</p> <p>3 weeks</p>	<p>KEY RESULT</p> <p>Every inquiry gets a personal response within hours, not days, with near-zero infrastructure cost</p>	<p>TECH STACK</p> <div style="display: flex; flex-wrap: wrap; gap: 5px;"> <div style="border: 1px solid #ccc; padding: 2px 5px; margin-right: 5px;">Python</div> <div style="border: 1px solid #ccc; padding: 2px 5px; margin-right: 5px;">Gemini</div> <div style="border: 1px solid #ccc; padding: 2px 5px; margin-right: 5px;">PostgreSQL</div> <div style="border: 1px solid #ccc; padding: 2px 5px; margin-right: 5px;">Google Workspace API</div> <div style="border: 1px solid #ccc; padding: 2px 5px;">Docker</div> </div>
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The Problem

Solo consultants live and die by their responsiveness. Leads come in from a contact form, but the gap between submission and first meaningful response is where most opportunities die. Research shows 35 to 50 percent of deals go to whoever responds first. Without a system, every inquiry gets the same generic treatment, follow ups get forgotten, and people who genuinely need help go cold while you are busy doing actual work.

- ! Inquiries sitting in an inbox for hours or days before getting a response
- ! No way to tailor the response to what someone actually needs
- ! Follow up sequences that depend entirely on memory and discipline
- ! People who need help going cold in the gap between reaching out and the first real conversation

The Approach

The core principle was simple: no one should reach out and hear nothing. Anyone who fills out a contact form should get a personal, relevant response within hours, not a generic auto-reply and silence. The system fills every gap between first contact and proposal with intentional, value-driven touchpoints.

✓ AI reads every inquiry and surfaces context so the response addresses their specific situation, not a template

✓ Qualification based on what someone is dealing with, not just their budget. Understanding the situation leads to better conversations

✓ Google Chat as the command center for approvals and notifications instead of email that gets buried

✓ Multi-channel follow up that varies content and format so no one gets the same message twice

INTENTIONALLY LEFT OUT

No traditional CRM. Why pay for a SaaS platform when you only use 10% of it? PostgreSQL tables handle the pipeline state, Google Chat handles the human decisions. Purpose-built beats general-purpose at this scale.

The Solution

A four stage system that covers the full journey from intake form to signed proposal. Stage one: AI reads the inquiry and sends an acknowledgment in under 60 seconds while preparing context for a personal follow up. Stage two: the system shares relevant work samples and maintains contact through multiple channels. Stage three: AI generates call prep, post-call briefing documents, and a shared success statement before the discovery call. Stage four: AI assembles an 8-section proposal from every touchpoint in the pipeline, presented live on a call.

- ✓ AI context analysis that reads each inquiry and surfaces what matters: what they need, what they have tried, and how urgent it is
- ✓ Automatic acknowledgment email within 60 seconds of form submission
- ✓ AI case study matching that picks the most relevant work sample for each inquiry
- ✓ Google Chat interactive cards for single tap approval of AI recommendations
- ✓ AI call prep that generates tailored questions, industry research, and preliminary scope before every discovery call
- ✓ Post-call briefing document: AI processes the transcript into situation, goals, what was discussed, and recommendations
- ✓ Success statement sent to the client 24 hours before the discovery call with key terms and a shared definition of success
- ✓ AI proposal generation: an 8-section package assembled from the intake form, both call transcripts, briefing document, and success statement
- ✓ Long-term relationship tracking so conversations can pick up where they left off, even months later
- ✓ Re-engagement detection: return visits and email engagement signal renewed interest and prompt a timely personal follow up
- ✓ Every conversation, including ones that do not lead to a project, informs how the system communicates going forward
- ✓ Full pipeline tracking from first touch through proposal presentation

Technical Highlights

Gemini model reads inquiry text and extracts context so the first human response is relevant and specific

Google Chat webhooks and interactive cards turn human approval into a 30 second tap instead of a 10 minute email review, making it possible to respond personally from a phone while away from the desk

PostgreSQL tracks every touchpoint, enabling the business intelligence report to surface what resonates and what needs to change

The Results

The system replaced a manual, inconsistent process with one that ensures every person who reaches out gets a relevant, personal response. AI handles coordination and context. The human handles the conversation.

Near \$0

MONTHLY RUNNING COST

<60s

FIRST RESPONSE TIME

AI

COORDINATION

Lessons & Takeaways

Understanding the situation beats checking the budget

Someone with a modest budget and a real problem they need solved is a better conversation than a large budget with a vague idea. Reading what someone writes about their situation turned out to be the strongest signal for whether a conversation will be productive.

Fill the silence or lose the conversation

The biggest drop off was between form submission and first booked call. That gap can stretch to two weeks without intervention. A relevant case study email, sent a few hours after the personal response, kept momentum alive during the most critical window.

Meet people where they are

After a few emails with no response, switching to a different channel or format often breaks through. Not everyone lives in their inbox, and a short video message or LinkedIn note can restart a conversation that email alone could not.

Every conversation makes the next one better

When a project is not the right fit, understanding why is just as valuable as closing a deal. Those conversations inform how the intake form is worded, what content gets created, and how future inquiries are handled. The system improves with every interaction.

Present proposals live, never send as attachments

Proposals are presented on a call, walked through section by section, and discussed in real time. Emailing a PDF and hoping for a response loses momentum. The live presentation turns a document into a decision.

Have a Similar Challenge?

Let's talk about how I can help solve it.

[Start a Conversation](#)