



AI Lead Qualification

Automatically scores and sorts every incoming lead by budget, intent and fit — so your sales team only spends time on the ones worth chasing.

Automatic Lead Scoring

Smart Routing

Sales-Ready Handoff

THE CHALLENGE & THE FIX

What Lead Qualification Actually Does

This automation acts as a first-round filter, holding a brief automated conversation with every new lead and scoring them before a human ever gets involved.

≡ The Problem Today

- Sales reps waste hours chasing leads that were never going to buy
- There's no consistent criteria for deciding which leads deserve priority
- Great leads sometimes sit at the bottom of a pile beneath weak ones
- Manual qualification calls take time that many leads simply won't give

⚡ The Agentra Fix

- AI asks a short set of qualifying questions automatically through chat
- Scores each lead against your defined criteria: budget, timeline, need, authority
- Hot leads are routed straight to a rep; cold ones move into nurture instead
- Every score and reasoning is logged for full sales team transparency

Using a lightweight, conversational version of frameworks like BANT (Budget, Authority, Need, Timeline), the AI asks a few natural questions through chat or SMS, interprets the answers, and assigns a qualification score. Leads that clear your bar are instantly routed to a sales rep with full context; leads that don't are automatically placed into a longer-term nurture sequence instead of being ignored entirely.

STEP-BY-STEP AUTOMATION FLOW

How It Works

A short automated conversation that separates ready-to-buy leads from early-stage browsers.



THE INTELLIGENCE LAYER

Under the Hood

How the AI actually thinks, decides and acts inside this automation.

The qualification logic is built around a scoring rubric you define upfront, for example weighting budget and timeline heavily for a high-ticket service, or weighting company size and role for a B2B offer. The AI is prompted with this rubric and the lead's actual answers, and returns both a score and a short written rationale, so sales reps can see exactly why a lead was marked hot or cold rather than trusting a black box.

Because the questions are asked conversationally rather than as a rigid form, response rates are typically much higher than static qualification forms; leads answer a friendly chat message far more often than they complete a five-field intake form. The system is also designed to gracefully handle partial answers, vague responses, or leads who go quiet mid-conversation, scoring based on whatever information is available rather than blocking on a perfect answer.

TECH STACK

**n8n Workflow Engine**

Runs the conversation flow and scoring logic

**GPT Language Model**

Asks questions naturally and scores answers against your rubric

**Custom Scoring Rules**

Encodes your specific budget, timeline and fit criteria

**CRM Integration**

Stores lead scores, answers and routing outcome

**Rep Notification (Slack/SMS)**

Instantly alerts a rep when a hot lead is identified

INTEGRATES WITH

HubSpot

GoHighLevel

Salesforce

Slack

Twilio

Google Sheets

WHY IT MATTERS

Key Benefits

Better information, sent to the right person, at the right time.



Sales Focuses On Real Buyers

Reps only spend time on leads that meet your actual criteria.



Instant Qualification

Leads are scored in minutes instead of sitting in a queue.



Higher Close Rates

Prioritizing hot leads shortens the path from lead to sale.



Consistent Criteria

Every lead is judged against the same rubric, no guesswork involved.



Full Transparency

Every score comes with a written reason the sales team can trust.



No Good Lead Missed

Cold leads are nurtured instead of falling through the cracks.

REAL-WORLD EXAMPLE

A commercial cleaning company receives 60 inquiries a month, ranging from small offices to large facilities. The AI qualifier asks about square footage, current provider, and timeline. Leads matching the company's ideal contract size are pushed straight to the sales director's phone within minutes, while smaller inquiries are automatically routed into a monthly nurture email, so no lead is lost, but the sales director's time is protected for the deals worth chasing.

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