2025

AI AUTOMATION

ENHANCING CONVERSION & ENGAGEMENT WITH AI-DRIVEN WORKFLOWS

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Case Study AI Automation 2025

DATA-DRIVEN DIAGNOSIS

The client utilized a massive, multi-step contact form with excessive dropdowns and input fields. This created high user friction, effectively acting as a barrier to entry for potential high-value leads.

- **Journey Mapping:** I've traced lead origination paths - analyzing exactly which pages users entered from (Organic, Ads, Social) and how they navigated to the contact page.
- **Behavioral Analysis:** Microsoft Clarity recordings revealed the specific user actions. We watched users scroll, hesitate at complex questions, and abandon the page.
- **The Verdict:** The data proved that high-intent traffic was arriving but exiting specifically because of the form's complexity. The form wasn't just filtering spam; it was killing conversion.

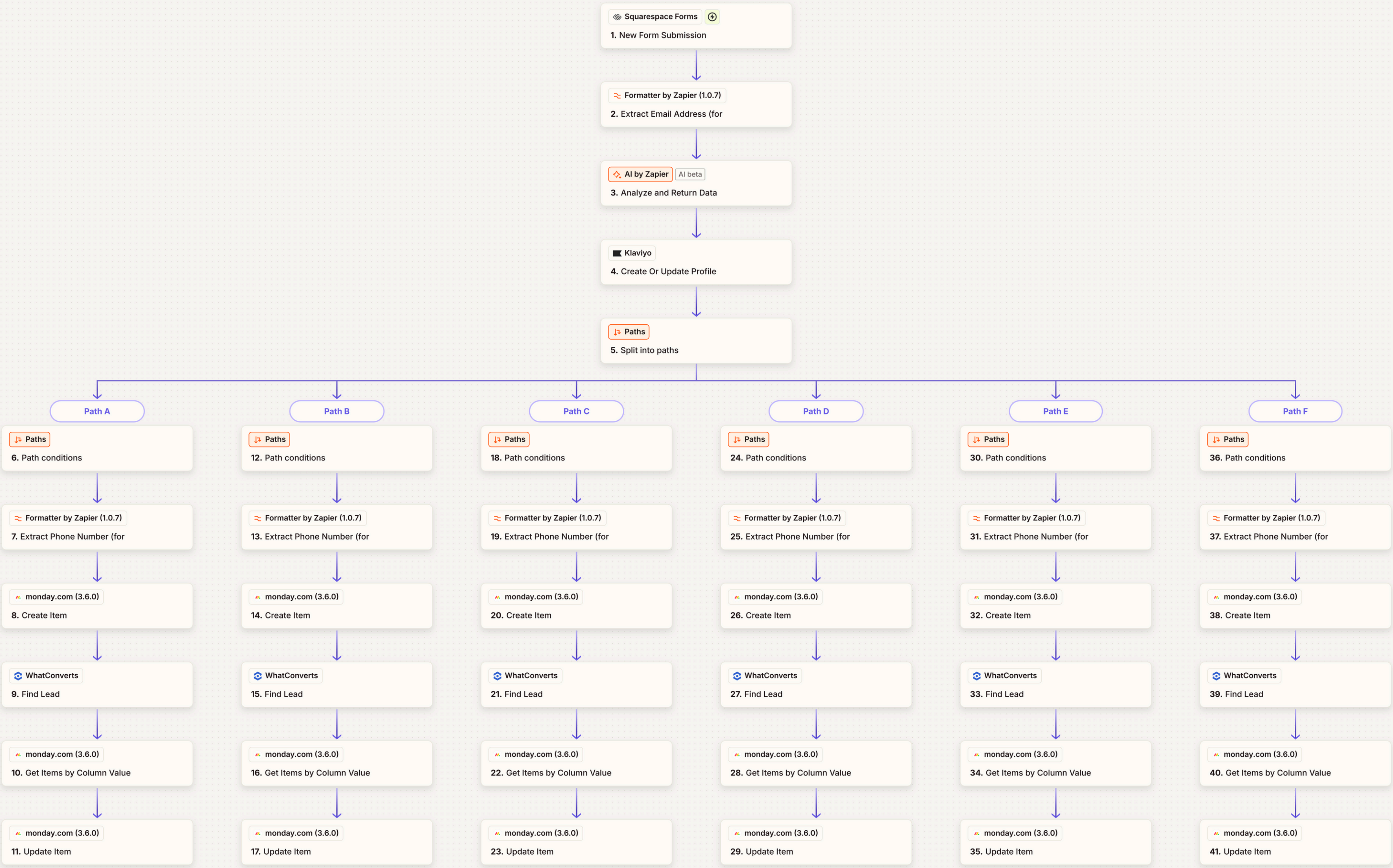
FRICTIONLESS ENTRY

I’ve fundamentally restructured the entry point to prioritize user experience over data collection density.

- **From Interrogation to Invitation:** I’ve shifted the philosophy from "extracting data" to "starting a conversation." I stripped the form of all non-essential qualifiers, retaining only the four pillars of identity: Full Name, Email, Phone Number, and an open-ended Message field.

- **Eliminating Cognitive Load:** I completely removed the complex logic trees, pre-selection dropdowns, and mandatory categorization fields. Instead of forcing the user to self-diagnose their problem (e.g., "Select Department," "Select Budget"), I shifted that analytical burden to our AI backend.

- **Instant Impact:** This reduction in friction yielded instant results. By lowering the barrier to entry and respecting the user's time, we observed an immediate and significant surge in form completion rates and raw lead volume.


Squarespace Forms
1. New Form Submission
Formatter by Zapier (1.0.7)
2. Extract Email Address (for
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3. Analyze and Return Data
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4. Create Or Update Profile
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5. Split into paths
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6. Path conditions
Formatter by Zapier (1.0.7)
7. Extract Phone Number (for
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8. Create Item
WhatConverts
9. Find Lead
monday.com (3.6.0)
10. Get Items by Column Value
monday.com (3.6.0)
11. Update Item
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38. Create Item
WhatConverts
39. Find Lead
monday.com (3.6.0)
40. Get Items by Column Value
monday.com (3.6.0)
41. Update Item

AI-POWERED CLASSIFICATION

1. Intent Analysis An AI Agent intercepts the webhook from the simplified form. It analyzes the unstructured "Message" field to understand the context and specific need of the lead.

2. Intelligent Tagging The AI classifies the lead into one of 6 specific service offerings or flags it as an administrative/HR inquiry, ensuring no lead is misrouted.

3. Structured JSON The analyzed data is formatted into a clean JSON structure, appending tags and routing instructions before it ever reaches the CRM.

A

Step 1: Attribution & Source Verification
We use What Converts to confirm where the lead came from - Google Ads, Facebook, Instagram, or organic. Each lead gets a Campaign ID and Source to ensure accurate tracking and ROI measurement.

D

Step 3: Service-Specific Routing
Based on the AI tags, the automation applies precise filters and sends each lead directly into the correct service pipeline - Service A, Service B, etc. - eliminating manual triage and ensuring the right team handles it immediately.

SMART DISTRIBUTION & TRACKING

B

Step 2: Enriched CRM Injection
The lead enters the CRM with all AI-generated context included - service tags, intent summary, and structured JSON data - ensuring the record is complete, enriched, and immediately actionable.

E

Step 4: Round Robin Assignment & Alerts
A Round Robin system distributes leads evenly across the sales team. Each assigned rep gets an instant notification with full lead context, ensuring fast and fair follow-up.

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Beyond Generic Acknowledgments Standard "Thank you for your message" auto-responders are conversion dead-ends

They provide no value and often signal a delay in human response. We replaced this outdated mechanism with a sophisticated secondary AI Agent dedicated solely to immediate lead nurturing.
Contextual Synthesis Engine This agent doesn't use templates. It generates a unique email from scratch by triangulating three critical data points:

- Deep Intent Analysis: It references the specific problem the user mentioned (e.g., "I saw your inquiry regarding Service A...").
- Lead Source Context: It acknowledges where they came from (e.g., "Thanks for clicking through from our LinkedIn post...").
- Salesperson Persona: It mimics the specific writing style and tone of the assigned sales representative, ensuring the email feels authentically human and consistent with future communications.

The Outcome: Immediate Rapport The result is a message that arrives in the lead's inbox seconds after submission, yet reads as if it were carefully drafted by a human over ten minutes. This establishes immediate trust, validates the lead's specific needs, and keeps the conversation momentum high while the sales team prepares their follow-up.

THANK YOU

READY TO AUTOMATE?

Let's build a system that turns your traffic into revenue.

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