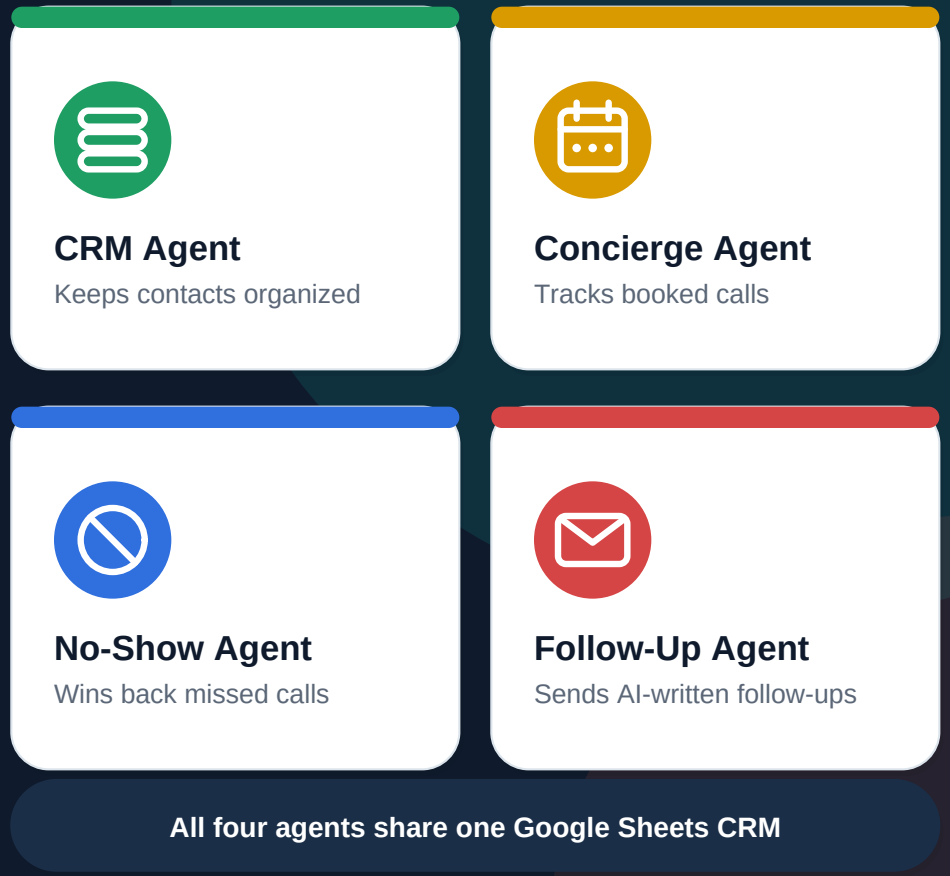
PORTFOLIO CASE STUDY | AI AUTOMATION

AI Lead Follow-Up & CRM Automation

A multi-agent n8n system that keeps your CRM clean, follows up with every lead, tracks booked calls, and wins back no-shows.

n8n | Google Sheets | Gmail | OpenRouter AI | Schedules



Workflow built in n8n | Emails sent through Gmail | AI models via OpenRouter

01 Project Overview

What the automation is, what it is for, and who it helps

PROJECT NAME

AI Lead Follow-Up & CRM Automation

A multi-agent automation that keeps a Google Sheets CRM up to date, sends AI-written follow-up emails in three phases, marks booked calls, and reaches out to people who miss their call.

MAIN OBJECTIVE

Make sure no lead is forgotten. Follow up on time, keep clear statuses, and save hours of manual email and sheet work.

WHO IT HELPS

- **Coaching and consulting businesses**
  Follow up with leads and booked calls
- **Online education platforms**
  Nurture people who asked about a course
- **Service-based businesses**
  Quotes, consults, and appointments
- **Sales and agency teams**
  Keep the pipeline moving
- **SaaS companies**
  Demo and trial follow-up

4 agents, each with one clear job

3 follow-up phases, written by AI

1 Google Sheets CRM as the single record

Auto status updates after each step

02 The Business Pain

What goes wrong when follow-up is done by hand

Leads go cold

Follow-up is late or forgotten, so interested people drift away.

Manual follow-up takes hours

Writing and sending similar emails one by one eats the workday.

Messy lead data

Contacts sit in email lists, sheets, and inboxes with no single record.

No-shows slip away

People miss booked calls and nobody reaches out again.

No clear next step

Without clear statuses, the team does not know who needs what.

Sound familiar?

Leads cost time and money to get. A follow-up system that runs on a schedule keeps them from slipping away and keeps your team focused on real conversations.

03 The Proposed Solution

Four small agents, each with one job, working from one CRM

WHAT HAPPENS	AGENT DOES	RESULT
A new contact joins the email list	**CRM Agent** Adds or updates the contact in the CRM	One clean record per contact
A lead has not replied yet	**Follow-Up Agent** Picks Follow Up 1, 2, or 3 and drafts it with AI	A fitting email is ready to send
A follow-up goes out	**Follow-Up Agent** Gmail sends it, then the CRM is updated	The sheet shows the latest phase
A lead books a call	**Concierge Agent** Checks the status and sets Call Scheduled	The CRM shows the call is booked
A lead misses the call	**No-Show Agent** Finds the no-show and sends a message in Gmail	The lead gets another chance to connect
A no-show message is sent	**No-Show Agent** Updates the No-Show status in the sheet	The team sees who was contacted

03 Manual Follow-Up vs. Multi-Agent Automation

Why several focused agents beat doing it by hand

Manual follow-up

- ✕ Follow up when someone remembers
- ✕ Copy and paste between sheets and inboxes
- ✕ The same email for everyone
- ✕ Statuses are often out of date
- ✕ No-shows are easy to forget
- ✕ More leads means more hours

VS

Multi-agent automation

- ✓ Schedules check the CRM on their own
- ✓ Each agent has one clear job
- ✓ AI writes a fitting email for each phase
- ✓ The CRM updates after every action
- ✓ No-shows get a follow-up message
- ✓ Handles more leads without more hands

IN ONE LINE

A multi-agent lead nurture system with a self-updating CRM.

Multi-agent means several small agents, each doing one job, all working from the same sheet.

04 Key Features & Capabilities

What the system can actually do

Scheduled lead intake

Checks for new contacts on a timer and reads your email list.

Contact processing

Goes through each contact one at a time and updates the CRM.

One CRM record

Google Sheets holds each contact, status, and follow-up phase.

Phase routing

A switch picks Follow Up 1, 2, or 3 for each lead.

AI-written emails

AI models through OpenRouter draft each follow-up message.

Gmail sending

Sends follow-ups and no-show messages from Gmail.

Call tracking

Marks a contact as Call Scheduled when the check passes.

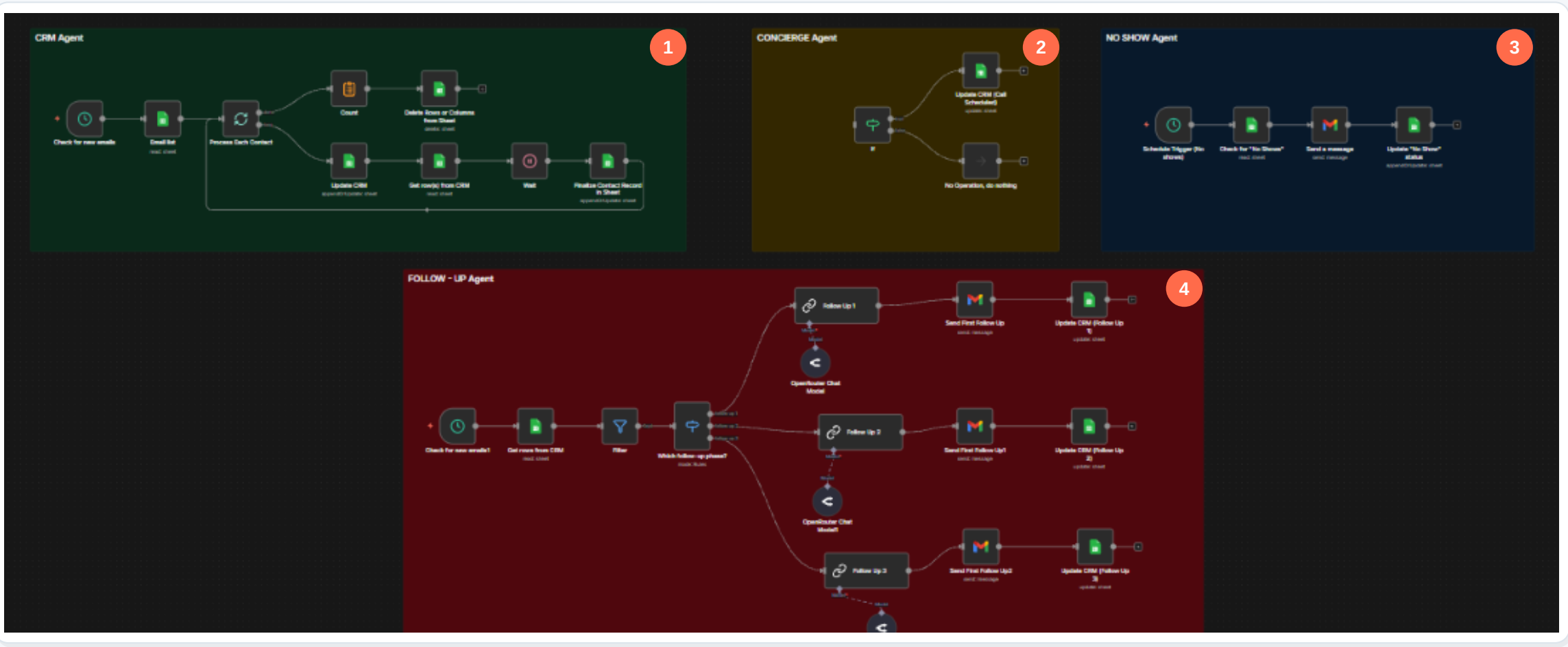
No-show recovery

Finds missed calls, messages those people, and updates the status.

Every step writes back to the CRM, so the sheet always shows the real status.

05 Workflow Architecture

The real n8n workflow, grouped into four agents



Real workflow in n8n. 1 CRM Agent 2 Concierge Agent 3 No-Show Agent 4 Follow-Up Agent

05 How the Four Agents Connect

What each group in the workflow does, step by step

CRM Agent

Collect and organize

On a schedule, it reads the email list and goes through each contact one at a time. It updates the CRM, waits, then finalizes the contact record. A separate branch counts rows and deletes rows from the sheet to keep it tidy.

Check for new emails → Email list → Process Each Contact → Update CRM →
Get row(s) from CRM → Wait → Finalize Contact Record

Concierge Agent

Track booked calls

Checks a condition on each contact. When the call is scheduled, it updates the CRM to Call Scheduled. When it is not, it does nothing.

If → Update CRM (Call Scheduled) → or: No Operation

No-Show Agent

Win back missed calls

On a schedule, it checks the sheet for no-shows, sends each person a message in Gmail, then updates the No-Show status so the team can see it was handled.

Schedule Trigger → Check for No Shows → Send a message (Gmail) →
Update No-Show status

Follow-Up Agent

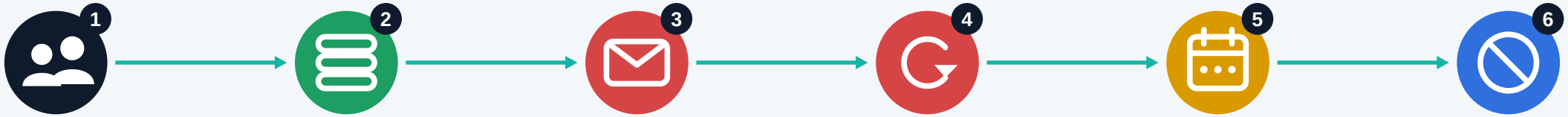
Send AI follow-ups

On a schedule, it reads rows from the CRM and filters them. A switch picks Follow Up 1, 2, or 3. An AI model through OpenRouter drafts the email, Gmail sends it, and the CRM is updated for that phase.

Schedule → Get rows from CRM → Filter → Which follow-up phase? →
Follow Up 1 / 2 / 3 → Send in Gmail → Update CRM

06 Lead Journey

How it works, from new contact to booked call or recovery



Lead joins the list

A new contact lands on the email list.

CRM Agent records

The contact is added or updated in the CRM.

Follow-Up Agent writes

AI drafts the right phase and Gmail sends it.

Status updates

The CRM shows which follow-up went out.

Call is booked

Concierge Agent sets Call Scheduled.

No-show recovery

No-Show Agent sends a message and updates the status.

Example CRM view

CONTACT	STATUS	LAST ACTION
Dana P.	New contact	CRM Agent
Alex R.	Follow Up 1 sent	Follow-Up Agent
Maria L.	Call Scheduled	Concierge Agent
Jon K.	No-Show	No-Show Agent

Example data only.

EXAMPLE FOLLOW-UP EMAIL (PHASE 1)

Subject: Quick check-in

Hi Alex,

Thanks for your interest last week. I wanted to see if you have any questions. If you would like to talk, pick a time that works for you and I will be ready.

Talk soon,
Your name

Example only. Real emails follow your brand voice.

07 Business Benefits & Expected Outcomes

The value, the time saved, and the operational gains

Timely follow-up

Leads hear from you on schedule, not whenever someone remembers.

Hours saved

AI drafts the emails and Gmail sends them, so staff stop typing each one.

One source of truth

The CRM shows every contact, status, and phase in one place.

Fewer lost calls

No-shows get a message and a clear status instead of being forgotten.

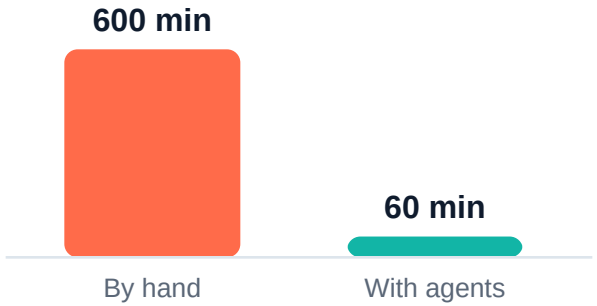
Easier to grow

Handle more leads without adding hands at the same pace.

Clear tracking

Every action updates the sheet, so you can see what happened and when.

Example time savings



40 new leads a week x 3 follow-up emails x 5 minutes each = 600 minutes. If the agents do the drafting and sending and a person spends about 60 minutes reviewing, you save about **9 hours a week**.

Example only. Real results depend on your lead volume, email length, and how much review you want.

08 Technology Stack & Implementation

The tools, what you need, and how it can be customized

TECHNOLOGY STACK

n8n	Workflow engine that runs every agent and schedule
Google Sheets	The CRM, the email list, and status tracking
Gmail	Sends follow-up emails and no-show messages
OpenRouter	Connects the AI models that write the follow-ups
AI chat models	Draft each phase of the follow-up email
Schedule triggers	Start each agent on a timer

WHAT YOU NEED

- n8n account (cloud or self-hosted)
- Google account with your CRM sheet
- Gmail access for sending
- OpenRouter API key for the AI models
- Your contact list and brand voice notes

CUSTOMIZATION IDEAS

- Swap Google Sheets for HubSpot, GoHighLevel, or Airtable
- Use Outlook instead of Gmail
- Add SMS or WhatsApp follow-ups
- Change the number of phases and the timing
- Connect a booking tool to set Call Scheduled

How it gets built

1 Map your stages

List your lead stages, statuses, and follow-up timing.

2 Set up the CRM

Build a clean sheet with the columns each agent needs.

3 Build and test

Connect the agents and test with sample contacts.

4 Launch and tune

Go live, review results, and improve the emails.

Ready to follow up with every lead?

Start by mapping how your leads move today. Then let four focused agents keep the CRM clean, send the follow-ups, and bring missed calls back.

Map your lead stages

Set up your CRM

Test, launch, improve

Built with n8n, Google Sheets, Gmail, and OpenRouter AI models.