
SOULWIRE STUDIO

AI AUTOMATION FOR OPERATORS

The Personalized Lead Nurturing Stack

Turn a raw form fill into a scored, nurtured, sales-ready lead. Automatically.

A no-code build that qualifies every inbound lead, sorts them in your CRM, and generates a personalized report plus a 7-day email follow-up sequence for the ones worth your time. Built in n8n.

Every lead qualified automatically. Every qualified lead nurtured for a week. Nothing worth saving gets thrown away.

SECTION I

What You're Building

Most intake forms do one thing: dump every submission into the CRM, identical. The lead who wants to start this week gets treated exactly like the tire-kicker who is "just exploring." Your attention spreads evenly across people worth wildly different amounts, and the good leads go cold while you catch up on manual follow-up.

That's the potential-lead trap: leads get captured but never moved forward, because qualifying them and following up by hand takes time you don't have. This system replaces "everyone into the CRM the same" with a brain that reads each lead, decides who's a fit, and does the follow-up work for you.

What you'll build

A single workflow with one spine and two outcomes.

THE FLOW

```
Form submission
|
Webhook (lead data arrives)
|
Clean the payload (fix messy form fields)
|
Qualify with AI (classifier reads the whole lead)
|
+-----+
|               |
| QUALIFIED      | UNQUALIFIED
|               |
| Save to CRM    | Save to CRM ← kept for later
|               |
| Generate outline → Expand to report → Convert to PDF → Update CRM
|               |
| Generate 7-day emails → Google Doc → Update CRM
```

THE RULE THAT MAKES THIS WORK

Saving every lead, qualified or not, is the design, not an afterthought. An unqualified lead today can be a perfect fit next quarter, and filtering by status costs nothing later. Nothing captured here ever gets thrown away.

SECTION II

What You Need

One workflow, six moving pieces — and every piece but n8n itself is swappable for whatever you already run.

PIECE	ROLE IN THE BUILD	SWAPPABLE FOR
Form / capture tool	Collects the lead's answers, sends them to a webhook	GoHighLevel, Typeform, ClickUp — any tool that can POST to a webhook
n8n	The brain: cleans data, routes, orchestrates every step	Self-hosted or cloud
AI model	Qualifies leads and writes the report and emails	Any capable chat model — standard, not reasoning (see Step 3)
CRM / database	Stores every lead with a status and the generated assets	Airtable, n8n Data Tables, a spreadsheet
HTML-to-PDF service	Turns the report into a downloadable PDF	PDF.co or similar
Docs tool	Holds the email sequence as a shareable doc	Google Docs

Qualified leads get the full treatment. Unqualified leads still get saved, never discarded — a "not right now" can become a "yes" in three months.

SECTION III

Build Steps

01

Capture the lead

Add a Webhook node (method: POST) as the trigger. In your form tool, add an automation that fires on submission and sends the data to the webhook URL. Any capture tool works as long as it can POST to a listening webhook.

02

Clean the payload

Use two Edit Fields (Set) nodes back to back: the first pulls only the fields you need out of the noisy payload, the second strips array brackets and stray quotes so ["ASAP"] becomes ASAP. Set it up once — every submission after that comes through clean.

WHY THIS MATTERS

Form platforms rarely send clean data — expect hidden line breaks in field keys and multi-select answers wrapped in arrays. Skip this step and every downstream node reads blanks.

03

Qualify the lead with AI

Add a Text Classifier node with two categories, qualified and unqualified, judging against criteria you define — urgency, a real business, a process-based challenge. Set a fallback branch so leads the AI can't cleanly judge still land somewhere instead of vanishing.

GOTCHA THAT WILL COST YOU AN HOUR

Give the classifier a standard chat model, not a reasoning model. Reasoning models return output the classifier's parser can't read, and you get "Model output doesn't fit required format."

04

Save to the CRM

Add two CRM create steps, one per branch: qualified leads get a Status of Qualified, unqualified leads get Unqualified.

WHY THIS MATTERS

Never throw a lead away. Saving costs one extra node, and an unqualified lead today may be a perfect fit next quarter. Filter by status to work each group differently.

SECTION III, CONTINUED

Build Steps

05

Generate the report outline

On the qualified branch, add an AI message node. Feed it the cleaned lead data and ask for a structured JSON outline: executive summary, current state, opportunity analysis, roadmap, recommendations, next steps. Point it at the cleaned questionnaire data, not the CRM record, so the report is built from the lead's actual answers.

WHY TWO STEPS INSTEAD OF ONE

Outline first, then expand. It produces a far more coherent report than asking for the whole thing in one shot — the outline locks the structure, the expansion fills it with depth.

06

Expand the outline into a full report

Add a second AI message node. Feed it the Step 5 outline and ask it to expand each section into a complete report, addressed to the lead by name, tied to their specific tools and challenges. End the prompt with hard output rules: state today's date, no page-break markers, valid HTML only — starting with `<html>` and ending with `</html>`, no code fences.

GOTCHA

Whatever field your AI node returns text in, reference it correctly downstream. Some nodes nest the text several levels deep — if a step gets an empty input, trace the previous node's output shape.

07

Convert the report to a PDF

Add an HTTP Request node pointed at your HTML-to-PDF service. Send the report HTML in the body and your API key in the header. You get back a PDF URL.

GOOD TO KNOW

Free tiers often expire the PDF link after about an hour. If you need it to last, save the PDF file itself into the CRM as an attachment, not just the link.

SECTION III, CONTINUED

Build Steps

08

Write the report back to the CRM

Add a CRM update step. Match on the record you created in Step 4 and fill in the report PDF link, the PDF as an attachment, and the outline for your own reference.

09

Generate the 7-day email sequence

Branch off the report node into a third AI message node. Feed it the full report and ask for a 7-day sequence, one email per day, each hitting a different angle: overview, quick wins, the core challenge, tech stack, ROI, implementation, long-term vision. Every email's call to action is to book a call. Basing the emails on the report, not just the raw questions, keeps them specific.

10

Save the sequence and link it

Create a Google Doc, insert the generated emails, then update the CRM record with the doc link. Every qualified lead's record now holds their report, their PDF, and a ready-to-send follow-up sequence — all from one form fill.

SECTION IV

The Three Prompts

These are the reusable core of the build. Adapt the voice and criteria to your business.

OUTLINE GENERATOR (SYSTEM)

Act as an expert consultant. Receive a lead's questionnaire answers as JSON. Produce a personalized report outline as structured JSON with sections for executive summary, current state assessment, opportunity analysis, implementation roadmap, recommendations, and next steps. Draw every section from their actual answers. Be specific, never generic. Output only valid JSON.

REPORT GENERATOR (SYSTEM)

Receive a report outline as JSON. Expand it into a complete, professional, personalized report addressed to the client by name. Tie every recommendation to their stated tools, goals, and challenges. End with the output rules: today's date, no page breaks, valid HTML only starting with <html> and ending with </html>, no code fences.

EMAIL GENERATOR (SYSTEM)

Receive the client's personalized report. Write a 7-day email follow-up sequence, one email per day, each targeting a different angle from the report. Personalize with the client's name, reference specific findings, and make booking a call the primary call to action in every email. Keep it professional but conversational.

SECTION V

The Upgrade Path: Real Lead Scoring

The build above sorts leads into qualified and unqualified. The next level is a genuine score. Upgrade the classifier to output three things instead of a yes or no: a score (0 to 100), a tier (Hot, Warm, Cold), and a one-line reason so you can trust and debug the call.

Write all three to the CRM, then branch the nurture on tier: hot leads get a fast, direct "book now" track; warm leads get education first; cold leads sit in the CRM for a later check-in instead of burning a full email sequence.

THE DIFFERENCE IT MAKES

A yes/no classifier gives you a sorted list. A score, a tier, and a reason give you a scored pipeline — one you can route, prioritize, and trust without opening every record to check.

SECTION VI

The Result

One form fill now produces a qualified, sorted lead, a personalized report, and a week of follow-up — without you touching a thing. The good leads move toward a booked call while they're still warm. The rest are saved, tagged, and waiting. No more potential-lead trap.

RATHER HAVE IT BUILT FOR YOU?

This guide is one system from the Soulwire Studio workflow library. We build AI automations for businesses that run on process: intake, scheduling, content, compliance-heavy operations. If you'd rather spend your time approving reports than building pipelines, book an audit and we'll find the automation hiding in your business.

[Book a 30-minute audit →](#)soulwirestudio.com