

◆ OPEN-SOURCE AI PLAYBOOK · FOR SALES

Speed-to-Lead Responder

New inbound leads wait hours for a reply, and by then they're talking to someone else.

THE SYSTEM

Researches every new lead, replies within minutes with a tailored answer and offers a call, with a rep watching.

🕒 BUILD TIME

2-3 days

🔧 HOW IT'S BUILT

No-code

🔌 WORKS WITH

HubSpot or Salesforce
+ Google Workspace
or Microsoft 365

👤 OWNER

Head of sales or
RevOps

How it works: from form to reply in four minutes, with a rep approving



■ 1 min 50 s the system

■ 2 min 5 s the rep reads and approves

■ 5 s sent

0:00 Form submitted Marisol Vega, finance director at Bluepeak Outdoor, asks if you connect to Shopify and QuickBooks.

0:04 Logged in the CRM New contact, no open deal, no owner. Sam is next on the rota, so the lead is his.

0:10 Research Their website, company size and Marisol's role, plus the CRM history: she downloaded the month-end guide in August.

1:05 Fit check Retail, about 120 people, a finance buyer: a good fit by your rules, so the reply offers a call.

1:10 Tailored draft Answers her question from your product pages, adds a line on closing across six stores, and includes Sam's booking link.

1:45 Checks No prices or promises beyond your approved pages. Her question is answered in the first line.

1:50 Sam gets it in Slack The research, the draft and three buttons: approve, edit or take over.

3:55 Sam approves He changes one word and taps approve.

4:00 Reply sent From Sam's own mailbox. The CRM is updated and a follow-up task is set for Thursday.

The same lead, on a clock you know

● With the system: reply at 4:56 pm

Without it: reply at 9:41 am next day

4 pm 6 pm 8 pm 10 pm 12 am 2 am 4 am 6 am 8 am 10 am

What the lead gets

Shopify, QuickBooks and your month-end

Sam Okoro, Fieldnote → Marisol Vega, Bluepeak Outdoor

Hi Marisol,

Yes, Fieldnote connects to both Shopify and QuickBooks, and pulls each store's numbers in every night.

With six stores, most of the month-end work is matching store sales to the books. That's the part Fieldnote does, so the close becomes checking rather than copying.

You've already read our month-end guide, so I'd skip the basics. A 20-minute call this week would start from your own setup.

[Book 20 minutes with Sam](#)

Sample reply, fictional companies. Highlights come from the form, her company's website, your CRM and your fit rules.

What the rep sees in Slack

Speed-to-Lead New lead for @Sam · Bluepeak Outdoor ·

Good fit

ASKED Do you connect to Shopify and QuickBooks?

DRAFT "Yes, Fieldnote connects to both..."

[Approve and send](#)

[Edit](#)

[I'll take it](#)

No answer in 10 minutes? It goes to the next rep. It never sends by itself.

Approve mode first. Watch mode later, for one lead type the sales lead picks: a 3-minute countdown the rep can stop.

Can we build it? FOR YOUR TECH LEAD

Tools you'll use

Catching new leads	HubSpot forms or Salesforce web-to-lead	or Typeform, Webflow forms
Running the steps	n8n	or Make, Zapier
Researching the company	Clay or Apollo, plus the company's website	or your CRM's own enrichment
Writing the reply	Claude	or ChatGPT, Gemini
Rep approval	A Slack message with buttons	or a Teams card
Sending and booking	The rep's Gmail or Outlook, plus HubSpot Meetings	or Calendly, Chili Piper

Three ways to build it

Start simple 1 day

Zapier catches the form, Claude writes a draft into the rep's Gmail drafts, and the rep sends it.

Production 2-3 days

n8n runs research, fit rules and the draft, posts it to Slack for approval, sends from the rep's mailbox and logs it in the CRM.

Custom 1-2 weeks

Adds watch mode for chosen lead types, routing by territory, and a follow-up if the lead doesn't book.

Access it needs

- ◆ Read and create access in the CRM: contacts, notes and tasks, no deletes
- ◆ Permission to send from each rep's mailbox, used only after approval
- ◆ A Slack app that posts to one channel

Guardrails

- ◆ A rep approves every reply until the sales lead turns on watch mode for one lead type
- ◆ No prices, discounts, features or dates beyond your approved pages
- ◆ Customers, partners, job seekers and complaints go to a person
- ◆ Research uses the company's public pages and your CRM only

What to measure

- ◆ Minutes from form to reply
- ◆ Share of drafts sent without edits
- ◆ Calls booked from first replies
- ◆ Leads that waited past your target time, and why

Who builds and runs it

A RevOps or sales ops person builds it in 2-3 days. The sales lead writes the fit rules and signs off the reply style. After that, reps spend about a minute per lead in Slack.

◆ **FREE, OPEN SOURCE, NO SIGN-UP**

20 AI systems every company should *build first.*

This playbook is one of 20. Each one solves a problem almost every company has, and shows how the system works, the tools it runs on, how long it takes to build and where a person signs off. Read them all, download any of them, and send them to your team.

[See all 20 playbooks →](#)

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WANT HELP BUILDING IT?

We'll build your first AI systems with your team.

In a free 30-minute call with our founder, we'll look at your tools and your week, and pick the playbooks that would save you the most time first.



Pallav Kaushish

Co-Founder, AiXGrowth

Free 30-minute call · No commitment

[Book a Strategy Call →](#)