

CASE STUDY

Instant Lead Response, Human-Gated

The AI drafts a personalized reply the moment a lead arrives. A person reviews and sends. Speed, without losing control.

— THE WORK

Slow follow-up loses deals, so I built a system that responds to inbound leads immediately. The moment one arrives, the AI gathers the relevant context and prepares a personalized draft, ready before the team is even awake. The design principle is control: the AI never sends on its own. It drafts, a person reviews in a simple console, and only then does it go out.

On top of that sit the safeguards most quick builds skip — a banned-phrase filter and brand rules that keep every draft on-voice, plus consent and compliance handling built into the flow rather than bolted on afterward. The operator sees the whole pipeline at a glance, from ingested to researched to drafted to approved to sent to converted, so nothing falls through the cracks.

— TECHNOLOGIES

Vellum

Supabase

Retool

GoHighLevel

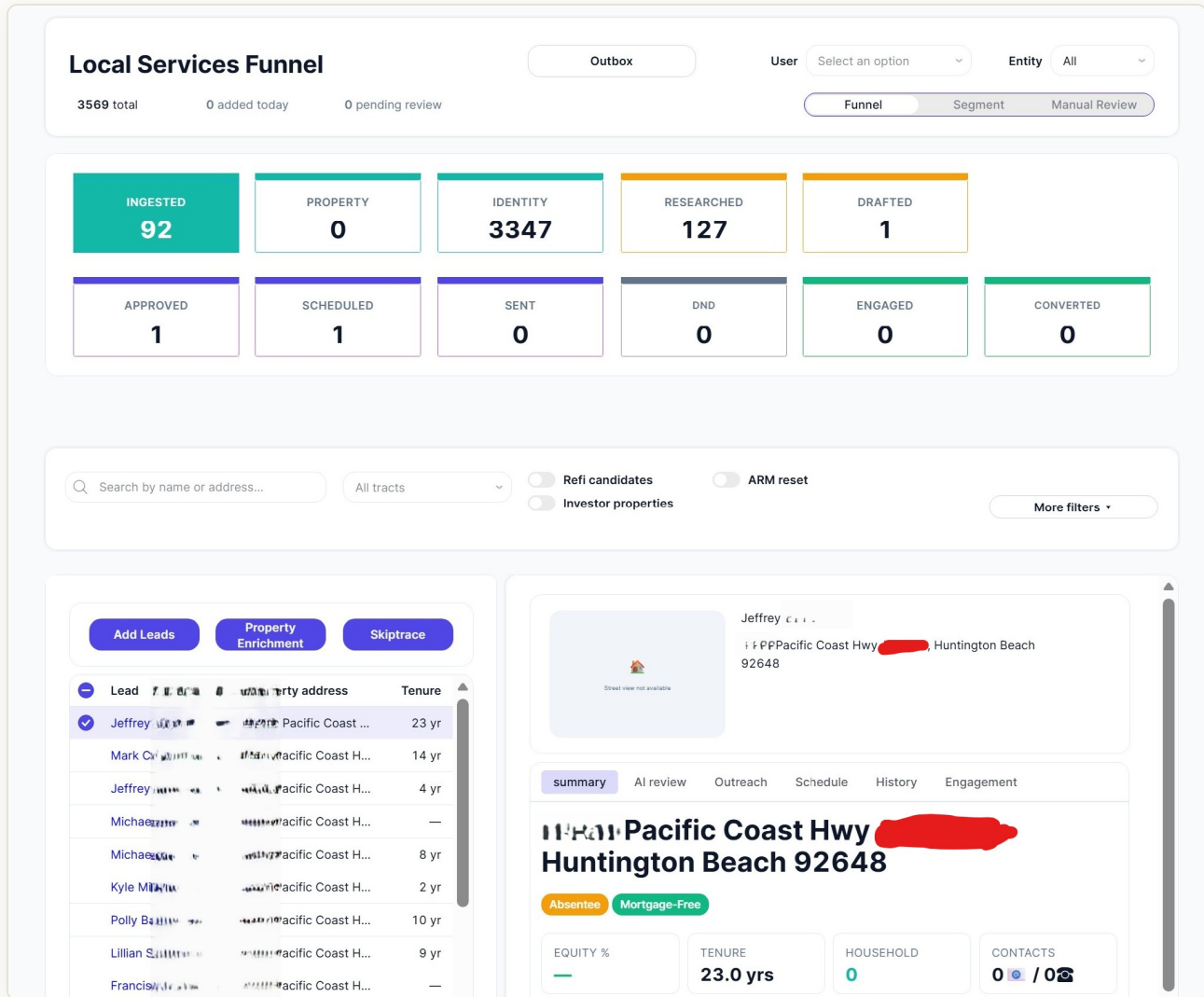
Claude

Python

— WHAT I TOOK AWAY

- ✦ Human-in-the-loop is a feature, not a limitation. Speed with a person's judgment beats full automation that occasionally embarrasses you.
- ✦ Compliance and brand safety belong in the architecture from day one, not patched in after a mistake.
- ✦ A single pipeline view, drafted through converted, is what makes an automated system trustworthy to operate.

THE OPERATOR CONSOLE



The operator console: every lead's pipeline in one view – ingested, researched, AI-drafted, approved, sent, converted.

HOW A LEAD MOVES

1

A lead arrives

Inbound contact captured and enriched automatically.

2

AI researches and drafts

It gathers context and writes a personalized reply, around the clock.

3

A human approves

Nothing sends until a person reviews it in the console.