

# Chat-to-CRM Lead Intake Automation for a Local Service Business

Case study based on ClearFlow Plumbing - a practical website chat workflow that captures new enquiries, qualifies them, updates HubSpot, creates an opportunity, and triggers follow-up automatically.

## Business scenario

ClearFlow Plumbing is a local plumbing and heating company handling urgent repair enquiries and routine inbound questions from its website.

## Problem

Website chats can be missed, contact details can sit in the wrong tool, and staff often have to rebuild the enquiry manually before they can respond.

## What I built

A workflow that takes a completed website chat, structures the lead details, routes the enquiry by outcome, updates HubSpot, creates and links the deal, sends an internal alert, and sends a customer confirmation email.

## Tools used

Landbot, Make, OpenAI, HubSpot CRM, Microsoft 365 Email (Outlook)

## Main outcomes

Urgent and standard qualified enquiries move into the sales path. Needs-review and unqualified paths are handled separately so the CRM stays clean.

## Why this matters

The team gets a usable CRM record and a clear action straight away, while the customer receives a prompt acknowledgement instead of waiting in silence.

## Workflow at a glance

- Captures the service request, urgency, area, and contact details from website chat.
- Structures the payload and routes the enquiry into the correct path inside Make.
- Searches for an existing HubSpot contact, then creates or updates the record.
- Creates a deal for qualified enquiries and associates it with the contact.
- Sends an internal alert email to the team and a confirmation email to the customer.

# 1. Website chat captures the customer enquiry and contact details

The virtual receptionist collects the issue, urgency, area, name, email, phone number, and preferred timing before confirming the enquiry.

1. Website chat captures the customer enquiry and contact details : The virtual receptionist collects the service request, urgency, location, name, email, phone number and preferred timing before confirming the enquiry.

Hi, I'm the virtual receptionist for ClearFlow Plumbing. I can take a few details and help get the right next step arranged.

What do you need help with today?

Emergency repair

1. Service request and issue are captured first so the workflow starts with clear context.

What best describes the issue?

Our heating has stopped working and we need someone out as soon as possible. It seems urgent and I'd really appreciate a fast callback.

2. Customer identity and contact details are confirmed before the enquiry is sent into the workflow.

Is this urgent?

Yes, urgent

3. Urgency, email, phone number and preferred timing are collected for qualification and follow-up.

What area or postcode are you in?

Austin

4. The chat confirms the enquiry has been received and marked urgent before the CRM and email actions run.

What is your full name?

Sarah Ahmed

What is your email address?

sarah.ahmed@

What is your email address?

sarah.ahmed@

What is your phone number?

+1 (5

When would you like help?

ASAP

Anything else we should know?

Yes - this is urgent, so I'd appreciate a callback as soon as possible. I'm in the service area and available to answer my phone.

Thanks - I've marked this as urgent and I'm passing it to the team now.

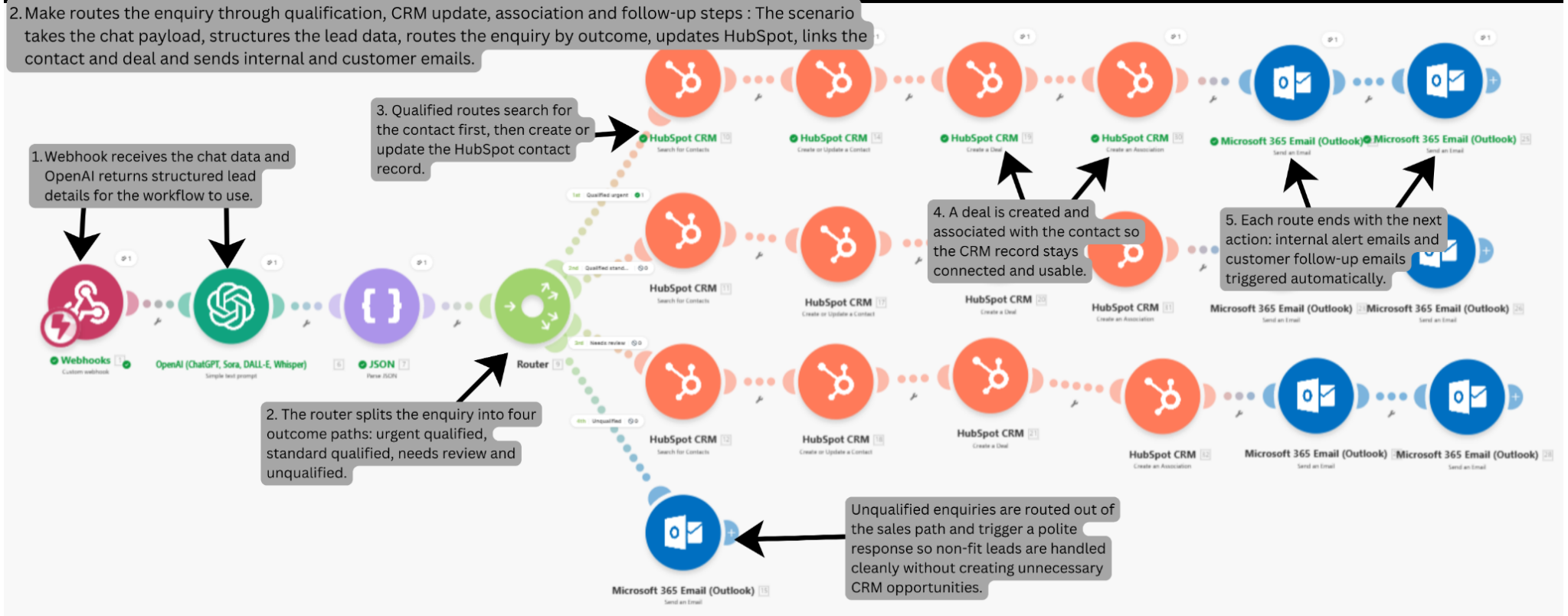
Thank you - your enquiry has been received.

Made with Landbot

Annotated screenshot from the working demo.

## 2. Make routes the enquiry through qualification, CRM update, association, and follow-up steps

Make receives the chat data, structures the lead details, splits the enquiry by outcome, and runs the CRM and email actions in the correct route.



Annotated screenshot from the working demo.

### 3. Contact and deal are associated so the enquiry is connected inside HubSpot

HubSpot shows the contact record, linked deal, company context, and activity timeline together so the sales context is usable in one place.

3. Contact and deal are associated so the enquiry is connected inside HubSpot: The workflow creates the contact record, adds the deal to the correct stage and links both records so the team can see the full sales context in one place.

**1.** The contact record shows the captured lead details, including name, email address and phone number.

**2.** The activity timeline confirms the contact and deal were created by the workflow and moved into the correct stage.

**3.** The associated company is visible on the contact record so business context is not lost after intake.

**4.** The associated deal appears on the right side of the contact record, proving the contact and opportunity are linked correctly.

Annotated screenshot from the working demo.

## 4. A deal is created for the qualified enquiry and moved into the correct pipeline stage

Qualified enquiries become real opportunities in HubSpot, with a clear deal name, the correct stage, and an associated contact.

4. A deal is created for the qualified enquiry and moved into the correct pipeline stage: The workflow creates a sales opportunity in HubSpot, places it in the right stage and keeps the contact linked so the team can work the lead properly

**Emergency repair Sarah Ahmed**

Amount: --  
Close Date: --  
Pipeline: Sales Pipeline  
Deal Stage: Qualified to buy - Awaiting Contact

Note Email Call Task Meeting More

Deal owner  
No owner

All activities Notes Emails Calls Tasks Meetings

Search activities

Activity (17/25) Clear all

March 2026

**Deal Activity**  
Emergency repair Sarah Ahmed moved to Qualified to buy- Awaiting Contact. [View details](#) Mar 28, 2026 at 8:49 PM GMT

**Created**  
This deal was created via Integration Mar 28, 2026 at 8:49 PM GMT

Customize

Contacts (1) + Add

**Sarah Ahmed**  
Email: [co.uk](#)  
Phone Number: [+1 \(512\)](#)  
[Add association label](#)  
View all associated Contacts

Companies (0) Add  
See the businesses or organizations associated with this record.

1. The deal record is created in HubSpot with a clear name based on the service request and lead.

2. The deal stage shows the enquiry has been moved into the correct qualified pipeline stage.

3. The activity timeline confirms the deal was created by the integration and updated automatically.

4. The associated contact appears on the right side of the deal record so the opportunity stays connected to the person.

Annotated screenshot from the working demo.

# 5. Internal alert email is sent so the team can respond quickly to the lead

The team receives a structured alert with the lead details, AI summary, qualification result, and recommended next step.

New urgent website chat lead - Sarah Ahmed Summary

5. Internal alert email is sent so the team can respond quickly to the lead: The workflow sends a structured internal summary with the lead details, urgency, qualification result and recommended next step so the team can act without checking multiple systems

AY To: 1. The subject line clearly flags that a new urgent website chat lead has arrived and identifies the customer by name.

Sat 28/03/2026 20:49

A new **urgent qualified lead** has come in through the website chat.

**Name:** Sarah Ahmed  
**Email:** .co.uk  
**Phone:** +1

2. The email includes the key lead details needed for quick action: name, email, phone, service request, urgency, area, and timing.

**Service request:** Emergency repair  
**Urgency:** Yes, urgent  
**Area / Postcode:** Austin  
**Preferred timeframe:** ASAP

**Issue details:**

3. The AI summary gives the team a short operational overview without needing to read the full chat transcript.

**Extra notes:** Our heating has stopped working and we need someone out as soon as possible. It seems urgent and I'd really appreciate a fast callback. Yes - this is urgent, so I'd appreciate a callback as soon as possible. I'm in the service area and available to answer my phone.

**AI summary:**

Sarah Ahmed requests an emergency repair for heating that has stopped working in Austin and wants an urgent callback ASAP. Contact details provided include email and phone.

4. Classification, reason, and next step make the qualification decision visible and explain what should happen next.

**Classification:** Qualified Urgent  
**Reason:** This appears to be an urgent repair request, the lead indicates they are in Austin which appears to be in the service area, and usable phone and email contact information are provided.  
**Next step:** Urgent Callback

5. The recommended action closes the loop with a clear instruction for the team to respond quickly.

Recommended action: **urgent callback required.**

Reply Forward

Annotated screenshot from the working demo.

## 6. Customer follow-up email is sent automatically after the qualified enquiry is processed

The customer receives a clear confirmation that the enquiry has been received, marked urgent, and passed on for follow-up.

**We've received your urgent enquiry**

6. Customer follow-up email is sent automatically after the qualified enquiry is processed: The workflow sends a clear confirmation email to the customer so they know the enquiry was received, marked urgent and passed on for follow up

1. The subject line confirms receipt of the urgent enquiry so the customer gets immediate reassurance.

2. The message is personalised with the customer's name and confirms the business has received the request.

3. The email repeats the key enquiry details so the customer can see what was captured and passed on.

4. The closing message sets the expectation that a team member will follow up using the provided contact details.

Hi Sarah Ahmed,

Thank you for contacting ClearFlow Plumbing. We've received your enquiry and passed it on for urgent review.

**Your details received:**  
Service request: Emergency repair  
Urgency: Yes, urgent  
Area / Postcode: Austin

A member of the team will follow up as soon as possible using the contact details provided.

Kind regards,  
ClearFlow Plumbing

AY

Reply Reply all Forward

Sat 28/03/2026 20:49

Reply Forward

Annotated screenshot from the working demo.