



CloudSage Consultancy Inc.

AI Chatbot + Salesforce Integration

Project Type: Lead Qualification Chatbot

Platform: WordPress

Tools Used: Landbot, Make.com, Salesforce

Objective: Automatically qualify leads, gather info, sync to Salesforce, and support FAQ interaction

Flow Breakdown:

1. **Chatbot embedded on homepage** using Landbot
2. Lead selects type → chatbot presents tailored questions (e.g., Are you looking to buy/sell/invest?)
3. Bot collects contact info (email, phone, name)
4. FAQ fallback enabled for top 10 common questions (GPT-3 powered, optionally)
5. Bot checks business hours:
 - a. If live agent is available, offers handoff
 - b. Else, sets expectation for follow-up
6. **Integration to Salesforce** via Make.com:
 - a. Creates Lead record
 - b. Populates custom fields (Lead Type, Source, Interest, etc.)
 - c. Sends internal email alert for hot leads

Results:

- 40% faster qualification vs. previous form
- Live agents only involved in 1/3 of cases (efficiency win)
- Salesforce lead quality score improved due to structured intake