



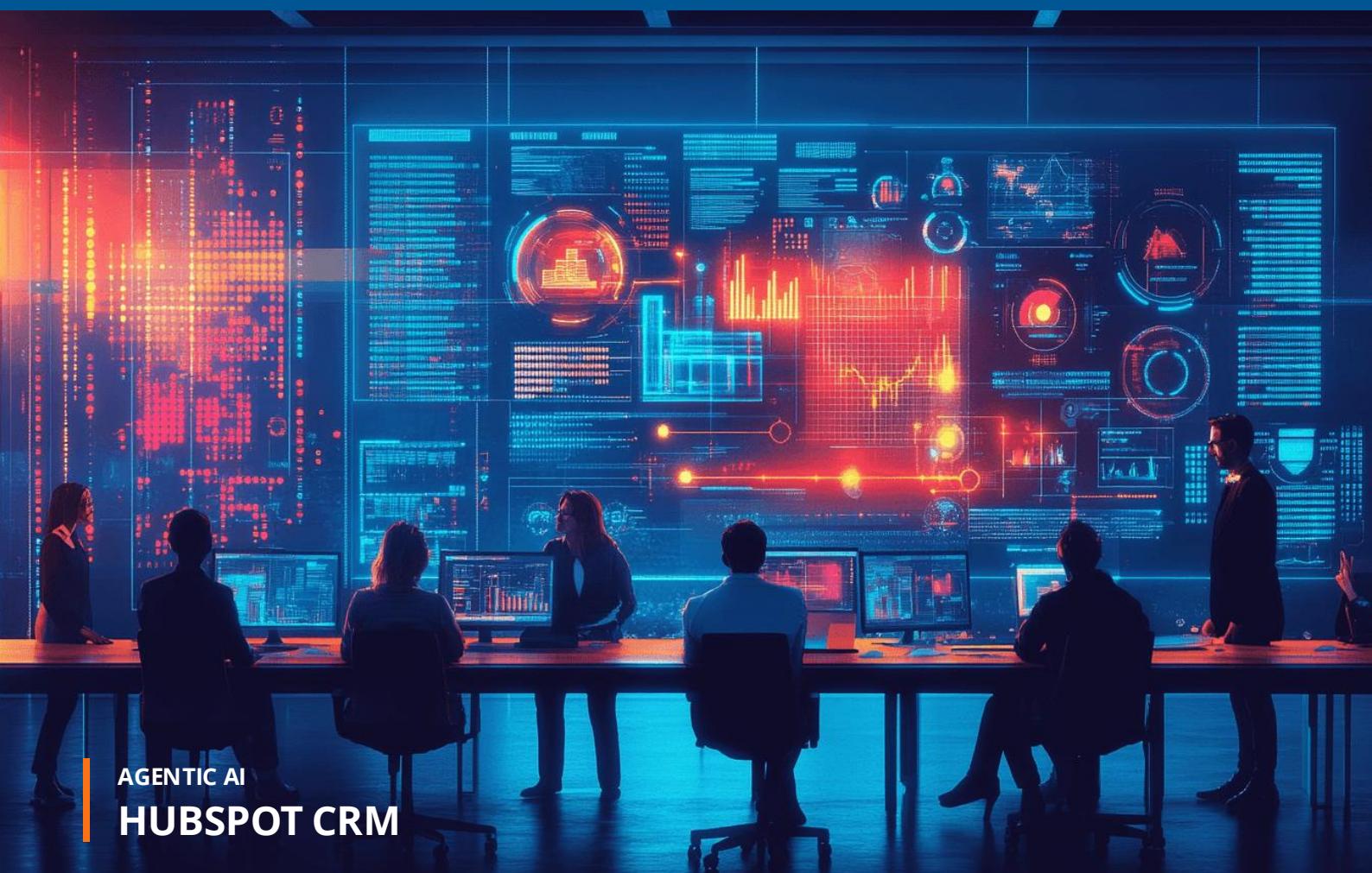
AI-DRIVEN SALES QUALIFICATION & CRM AUTOMATION

# Agentic AI Lead Qualification & CRM Orchestration

CB Virtual Sales Assistant integrated with HubSpot CRM



UNITED KINGDOM



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HubSpot CRM Orchestration

# Agentic AI Lead Qualification & CRM Orchestration

## ENGAGEMENT MANDATE

High-value consultants were experiencing material revenue leakage due to excessive time spent handling unqualified inbound enquiries, while delayed response times were negatively impacting conversion rates.

The commercial risk was twofold: loss of billable capacity and reduced top-of-funnel efficiency.

**CB Tech Consulting was engaged under a defined Statement of Work to design and deliver an automated solution that removed these constraints without increasing operational overhead.**

## STATEMENT OF WORK DELIVERED

CB Tech Consulting designed and delivered the CB Virtual Sales Assistant, an Agentic AI capability integrated with HubSpot CRM with scope including:



**24/7 inbound lead capture**



**Automated qualification logic aligned to commercial criteria**



**Structured CRM data orchestration**



**Automated booking of qualified meetings**



**Secondary feedback loop capturing insight from non-qualifying leads**



*The solution was delivered as a fully autonomous, production-ready system with no ongoing consultancy dependency.*



# Agentic AI Lead Qualification & CRM Orchestration

## COMMERCIAL & OPERATIONAL OUTCOMES



### EFFICIENCY

## 20+ hrs

Recovered consultant time by removing unqualified handling



### CONVERSION INTELLIGENCE

## ~40%

Increase in actionable lead data via structured feedback capture



### AUTOMATION

## End-to-end

Fully automated workflow from enquiry to booked meeting



### RESPONSIVENESS

## Faster replies

Improved response times supporting higher conversion efficiency



### RISK & CONTROL



Deterministic qualification logic aligned to defined commercial rules



Controlled AI decision boundaries protecting conversion quality



Clean delivery with no requirement for ongoing operational involvement

