

From Ad Click to Qualified Lead - Automated

How an AI-powered WhatsApp chatbot transformed cold social-media traffic into warm, classified, CRM-ready leads - without a single human agent touching the first conversation.

INDUSTRY	PLATFORM	AD SOURCE	INTEGRATIONS
Real Estate	WhatsApp Business API	Facebook & Instagram	Sheets · CRM · WA Agents

Leads were landing, but slipping through.

A growing real estate company was running active paid campaigns on Facebook and Instagram, driving significant traffic directly to WhatsApp via click-to-chat links. The moment a lead arrived, the entire burden fell on human sales agents - most of whom were busy on calls, in meetings, or simply unavailable outside business hours.

The result: delayed responses, inconsistent qualification, lost context, and a CRM full of half-filled records. Leads that arrived at midnight would go cold by morning.

3-6h

Average first response time

40%

Leads with incomplete data

0

After-hours coverage

**100%
manual**

CRM & sheet entry

Solution

An intelligent first-touch agent that feels human.

We built a WhatsApp AI chatbot that handles every inbound lead the moment they land - day or night. It does not behave like a form; it holds a genuine, casual conversation to understand what the customer is really looking for, gathers all critical qualification data, and hands off to a human agent only when the time is right.

The bot is a warm, approachable assistant - not a scripted IVR tree. It adapts its tone, handles clarifications, and keeps conversations short, always steering toward one goal: booking a call or an office visit.

"The goal was not to replace the sales agent - it was to make sure every agent only ever spoke to someone genuinely ready to talk."

Qualifying a lead in under 5 minutes.

The bot follows a natural conversation arc - never firing a list of questions at once. Each message feels like a reply, not a form field.

1

Warm Welcome & Intent Detection

Greets the lead by name where available and opens simply: buy or rent? Sets a friendly tone from the first message.

2

Purpose Qualification

Determines whether the intent is personal use, investment, or business premises. This shapes every recommendation that follows.

3

Budget Discovery

Asks for a comfortable budget range in a low-pressure way, reducing friction and encouraging honest disclosure.

4

Location & Property Preferences

Collects preferred areas, proximity needs, property type, size, and any deal-breakers.

5

AI-Powered Property Matching

Requirements are translated into a dynamic SQL query against the live property database. The top 2-3 matches are shown in chat.

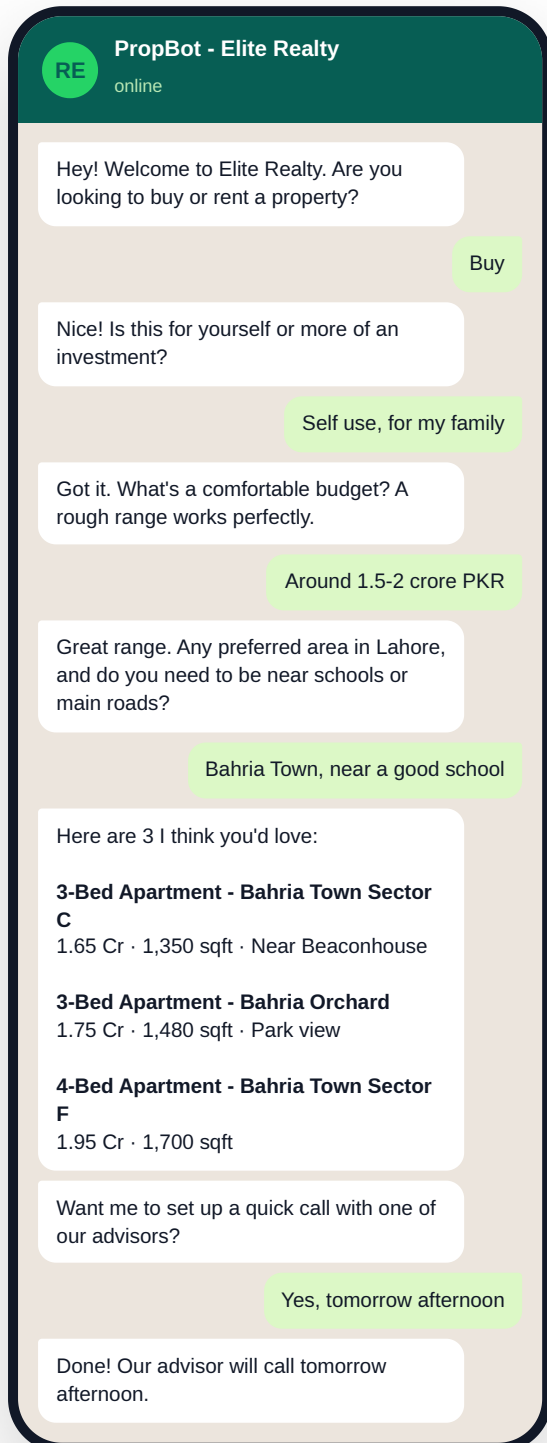
6

Call-to-Action: Schedule or Visit

After presenting properties, the bot naturally pivots to booking a sales call or office visit - no hard sell.

What the conversation actually looks like.

Short messages, natural language, and no option-numbered menus. A representative exchange:



Why this works

- The bot asks one thing at a time, so the lead never feels interrogated.
- Budget and location are captured conversationally, not as rigid form fields.
- Relevant properties are shown before the close, creating a natural reason to book a call.
- The handoff happens only after intent is clear and the lead has agreed to a next step.

What runs under the hood.

Every component operates in real time - zero manual intervention between a lead landing on WhatsApp and their record appearing in the CRM.

1

WhatsApp Business API

Official API handles message routing with support for media, quick replies, and rich property-card templates.

2

Conversational AI Engine

NLP layer parses free text, handles variations, detects intent, and manages multi-turn context.

3

SQL Query Generator

Converts budget, location, type, and purpose into a dynamic SQL query against the live property database.

4

Google Sheets Integration

Every qualified lead is pushed as a structured row in real time: name, number, intent, budget, location, and classification.

5

CRM Integration

Creates a CRM lead record with all qualification fields pre-filled and conversation history attached.

6

Agent Handoff Module

For Interested leads, the system auto-assigns a sales agent and forwards the transcript via WhatsApp instantly.

Every lead gets classified before a human sees it.

After the conversation ends, the AI reviews the full exchange and assigns one of three classifications. This determines urgency and follow-up channel - ensuring no agent wastes time on an unqualified contact.

INTERESTED

Hot, ready-to-talk lead

Clear intent, defined budget, specific location, and agreement to a call or office visit. Assigned to an available sales agent immediately, with full chat history pushed to WhatsApp.

FOLLOW-UP NEEDED

Engaged but non-committal

Showed genuine interest without booking. Enters an automated nurture sequence with a follow-up triggered in 24-48 hours.

NOT INTERESTED

Low-priority contact

Browsing or pricing-only intent. Still logged in the CRM for future campaigns and retargeting, but no immediate agent time is spent.

Classification is based on explicit booking confirmation, engagement depth, qualification completeness, and stated timeline signals.

The agent gets everything. Instantly.

When a lead is classified as Interested, the handoff is automated and immediate. The assigned sales agent receives a WhatsApp message with everything they need before picking up the phone.

- Lead's name, phone number, and preferred contact time

- Intent, purpose, and budget range

- Preferred location and property type requirements

- Properties shown during the bot conversation

- Full conversation transcript for complete context

- AI-generated lead classification and interest signal summary

The agent arrives at the first call already knowing who they are talking to. Context loss between bot and human is eliminated entirely.

Results after deployment.

Within the first 60 days of going live across Facebook and Instagram campaigns:

<90s

First response time
down from 3-6 hours

24/7

Full coverage including
weekends & holidays

3x

More leads fully
qualified per day

68%

Reduction in agent time
on cold leads

100%

CRM entries complete
at creation

41%

Increase in scheduled
sales calls month-over-month

Technology Stack

Built with

WhatsApp Business API

Meta Ads Click-to-Chat

Python

FastAPI

LLM / OpenAI

SQL Query Generator

MySQL

Google Sheets API

CRM API Integration

Webhook Agent Routing

Lead Classification Model

Key takeaways.

This project shows that the gap between a social media ad and a booked sales call can be fully automated - without sacrificing the warmth that real estate decisions require.

By treating the chatbot as a knowledgeable front-desk assistant rather than a lead form, the experience feels natural for buyers and renters. By making data capture and CRM entry invisible and automatic, it removes the administrative burden from agents entirely.

Every lead gets an instant, intelligent response. Every agent gets a warm, pre-qualified contact with full context already in hand.

"The bot does not close deals. It makes sure the people who can close deals never waste their time."