

Full AI Business Assessment - MiklosKovacs.io

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1. AI Leverage Summary

MiklosKovacs.io is in a strong position to benefit from a practical AI and automation system because the business already has paid lead flow, an advisory offer, an existing email/CRM platform, and a founder-led sales process. The main constraint is not lack of market activity; it is response speed, follow-up consistency, and founder capacity.

The strongest first workflow is an immediate lead capture, acknowledgment, qualification, and follow-up system for Facebook ad leads. Today, new leads may wait until the evening or next day before receiving a response. In a competitive consulting or advisory market, that delay creates a clear conversion risk: prospects may speak with competitors before Miklos has a chance to engage them. A fast, structured follow-up workflow can reduce that leak without requiring more ad spend, more staff, or a complex sales agent.

The recommended first build should use Make.com as the workflow orchestration layer, Brevo as the CRM and email engine, Facebook Lead Ads and/or WordPress forms as lead sources, and carefully controlled AI assistance for message drafting, lead tagging, and reporting summaries. The initial system should not try to close sales automatically. It should respond quickly, organize the opportunity, trigger a simple follow-up path, and hand the conversation back to Miklos when a prospect replies, books a call, or shows higher buying intent.

Beyond this first workflow, there are several valuable AI opportunities for the business. These include structured CRM qualification, content planning support, lead magnet nurture sequences, Facebook ad reporting summaries, call note capture, research support, and eventually more advanced agent-style workflows for sales preparation and client delivery support. The key is sequence: build the revenue-protecting automation first, then expand into marketing consistency and operating leverage.

2. Leverage Snapshot

- **Recommended first workflow:** Immediate lead capture, acknowledgment, qualification, and follow-up for Facebook ad and website leads.
- **Primary bottleneck:** Slow lead response caused by limited founder availability, especially when leads arrive during the day and are not handled until the evening.
- **Expected practical leverage:** Faster first response, fewer dropped leads, clearer CRM records, more reliable follow-up, and more time protected for sales conversations and delivery work.
- **Effort level:** Low to medium. The work is mostly workflow design, field mapping, email templates, Brevo configuration, Make.com automation, and testing.
- **First KPI to track:** Median time from lead submission to first response.

- **Starting tool stack:** Make.com, Brevo, Facebook Lead Ads, WordPress forms, email notifications, and ChatGPT for controlled copy and summary support.
- **Do not build first:** Fully autonomous sales agents, autonomous ad optimization, complex multi-channel chatbots, phone agents, invoice automation, hiring workflows, or client-side AI products for customers. These may become useful later, but they are not the best first move for the current operating constraint.

3. Current Process Review

Inputs

- Facebook ad leads from paid campaigns.
- Website or WordPress form submissions, where applicable.
- Lead magnet activity from prospects who may not immediately book a call.
- Manual prospect context gathered by Miklos when preparing outreach.
- Campaign, ad set, and ad creative data from Meta/Facebook Ads.
- Existing contact and email data in Brevo.

Outputs

- Personalized email outreach to new leads.
- Follow-up messages when prospects do not respond immediately.
- Zoom sales calls when a prospect engages or books.
- CRM/contact records in Brevo.
- Manual notes or mental tracking of where each prospect stands.
- Content posts, lead magnet nurture messages, and ad performance review decisions.

Current Tools

- **Brevo:** Used as the main contact and email platform, with potential to become a more structured CRM pipeline.
- **Make.com:** Already a good fit as the automation layer for connecting lead sources, CRM records, email actions, notifications, and reporting.
- **Facebook Lead Ads / Meta Ads:** Primary paid lead source to be connected directly into the follow-up workflow.
- **WordPress:** Likely source for website forms and landing pages.
- **Zoom:** Used for sales conversations and consultation calls.
- **ChatGPT:** Useful as a controlled drafting and summarization assistant, not as an unchecked decision-maker.

Handoffs

- Lead capture currently hands off manually to Miklos for review and outreach.
- Outreach hands off manually to follow-up and scheduling.
- Prospect conversation hands off manually to proposal, contract, or implementation steps.
- Ad performance review hands off manually to campaign decisions.
- Content ideas hand off manually to drafting, editing, publishing, and nurture.

Current Friction Points

- New leads may wait approximately a day before receiving a meaningful response.
- Personalized outreach and follow-up are handled manually, which makes consistency difficult.
- CRM status and qualification logic are not yet structured enough to support scale or delegation.
- Content planning is described as chaotic and draining, reducing consistency in organic marketing.
- Ad analysis requires manual review, adding to the founder's evening workload.
- The founder is the central bottleneck across sales follow-up, content, reporting, and delivery.

What Is Already Working

- The business has an offer and advisory model where qualified conversations can drive revenue.
- Paid ads are already generating leads, so the first improvement can focus on conversion and response rather than creating traffic from scratch.
- Brevo and Make.com provide a practical starting stack without requiring a heavy software rebuild.
- Proposal or contract automation does not appear to be the current constraint, so the business can avoid rebuilding areas that are already functional.
- Founder involvement remains a strength for high-trust sales, provided automation protects time and accelerates the first response.

Assumptions to Verify

- Confirm whether Facebook lead forms always capture email directly, since any missing email path must route to manual review.
- Confirm whether Brevo is currently configured with pipeline stages or mainly used as a contact and newsletter platform.
- Confirm whether a scheduling tool is currently used for Zoom bookings, such as Calendly, Cal.com, TidyCal, or Acuity.
- Confirm the exact compliance requirement that was mentioned during intake, including whether UK or EU data protection obligations apply.
- Confirm whether LinkedIn should be included in the first content workflow or added after Facebook content is stabilized.
- Confirm whether ad reporting should write to Google Sheets, Airtable, Looker Studio, or another preferred reporting destination.

4. Leverage Bottleneck Analysis

Revenue and Conversion Leakage

The most important leak is the delay between lead submission and first response. Paid leads

are time-sensitive. If a prospect submits a form after seeing an ad, their interest is highest at that moment. A delayed response creates room for distraction, comparison shopping, and competitor conversations. The fix is not a complicated autonomous salesperson; it is a reliable speed-to-lead workflow that responds immediately, confirms next steps, and escalates high-intent prospects to Miklos.

Founder Capacity Leakage

Miklos is currently the operating center for sales follow-up, content planning, ad analysis, and delivery. This limits growth because the most important tasks compete for the same small evening work window. Workflow automation should protect the founder's attention by handling predictable administrative steps: contact creation, tagging, first acknowledgment, simple follow-up timing, CRM updates, and reporting preparation.

Attention Leakage

When lead records, follow-up steps, content planning, and ad review remain loosely structured, the founder must hold too much context mentally. This increases the chance of dropped leads, delayed responses, inconsistent messaging, and lower-quality prioritization. AI can help summarize and draft, while classic automation should enforce reliable process steps and data movement.

Data Quality Leakage

If lead source, campaign name, offer interest, consent status, reply status, and booking status are not consistently captured, it becomes difficult to understand which campaigns and offer pathways are producing qualified conversations. A structured Brevo pipeline with clean fields and tags will make future reporting, segmentation, and follow-up more useful.

Marketing Consistency Leakage

Content planning is a recurring energy drain. This is a strong candidate for AI assistance, but it should follow the lead-response build rather than precede it. A practical content copilot can turn defined content pillars into post ideas, draft copy, repurpose approved messages, and create nurture emails for lead magnet subscribers. Human review should remain in place to protect brand voice and message quality.

Decision-Making Leakage

Facebook ad review currently consumes manual effort. A recurring reporting workflow can pull campaign performance into a simple dashboard or spreadsheet, then use AI to summarize results and highlight items that deserve review. At the beginning, AI should not change budgets or targeting directly. It should support human decision-making with organized data and recommendations.

5. Effort vs Impact View

Quick Wins

- **Immediate acknowledgment email for new Facebook leads:** High impact, low complexity. This reduces response delay immediately and creates a more professional first impression.
- **Brevo contact creation/update with source tagging:** High impact, low to medium complexity. This improves CRM hygiene and makes later reporting more reliable.
- **Internal notification to Miklos for each qualified lead:** High impact, low complexity. This creates a fast manual takeover point without requiring a full sales agent.
- **Two-step follow-up sequence:** High impact, low complexity. This ensures prospects are not lost simply because the founder did not have time to manually follow up.

Strategic Opportunities

- **Structured lead qualification and routing:** Adds pipeline stages, tags, offer interest, and qualification logic so each lead receives the right next step.
- **Lead magnet nurture workflow:** Converts passive lead magnet downloads into warmer prospects through useful, relevant follow-up.
- **Content planning copilot:** Reduces the most draining recurring marketing task by creating a monthly planning and approval system.
- **Facebook ad performance reporting:** Saves analysis time and connects campaign performance to lead quality and bookings.

Bigger Future Projects

- **Sales preparation assistant:** A controlled agent that summarizes a lead's source, form responses, CRM history, and likely needs before a sales call.
- **Knowledge base and offer assistant:** A searchable internal assistant trained on offers, case examples, past proposals, FAQs, and delivery frameworks.
- **Website chat assistant:** A controlled chatbot for common questions, lead capture, and routing once the core CRM and follow-up workflows are stable.
- **Call intelligence workflow:** Automatically records, transcribes, summarizes, and extracts follow-up actions from sales calls using tools such as Fathom, Fireflies, or Otter.

Lower-Priority Items to Defer

- Fully autonomous sales closing should be deferred because the offer requires trust, context, and founder judgment.
- Autonomous ad optimization should be deferred until reporting quality and conversion tracking are stable.
- Voice agents and missed-call recovery should be deferred unless phone-based lead handling becomes a meaningful source of lost opportunities.
- Invoice follow-up and accounting automation should be deferred because the current bottleneck is lead conversion and founder capacity, not collections.
- Complex multi-channel chatbot deployment should be deferred until the first lead workflow and CRM foundation are working reliably.

6. Highest-Leverage Workflow

Recommended First Workflow

The recommended first workflow is an immediate lead capture, acknowledgment, qualification, and follow-up system for Facebook ad leads, with the option to include WordPress form leads at the same time if the form structure is available. The workflow should capture the lead, create or update the Brevo record, tag the contact by source and offer, send an immediate acknowledgment email, start a short follow-up sequence, and notify Miklos when a lead requires review or takeover.

Current Manual Process

A prospect submits a Facebook lead form or website inquiry. Miklos later checks for new leads, often during the evening. He reviews available contact details, may need to look for missing information, writes a personalized email manually, waits for a response, and then schedules a Zoom call if the prospect engages. Follow-up is dependent on available time and attention, which makes response speed and consistency uneven.

Recommended To-Be Workflow

When a new lead is submitted, Make.com triggers immediately. The workflow normalizes the lead fields, searches Brevo for an existing contact, creates or updates the contact, applies source and offer tags, records consent status, and places the lead into the correct pipeline stage. The system sends a fast acknowledgment email and alerts Miklos. If the lead does not respond or book, a short follow-up sequence continues. If the lead replies, books a call, or meets a high-intent rule, automation pauses and Miklos takes over.

Why This Should Be First

This workflow addresses the clearest revenue bottleneck: paid leads are already being generated, but delayed response may be reducing conversion. Improving speed-to-lead is measurable, directly tied to sales outcomes, and achievable with the existing tool stack. It also creates a clean operating base for later content nurture, ad reporting, call summaries, and sales preparation agents.

Where AI Fits

- **Email drafting support:** ChatGPT or Claude can help draft acknowledgment and follow-up templates in Miklos's tone. Final templates should be reviewed before launch.
- **Personalization assistance:** AI can generate light personalization from form fields such as service interest, business type, or campaign source, but should avoid unsupported claims or over-specific assumptions.
- **Lead summary:** AI can summarize lead context for Miklos in the internal notification, especially if form responses include business challenges or goals.
- **Reporting summaries:** AI can later summarize response time, booking rates, and

campaign performance into a weekly digest.

Where Classic Automation Fits

- Triggering when a lead arrives.
- Mapping and normalizing form fields.
- Creating or updating contacts in Brevo.
- Adding tags, attributes, source metadata, and pipeline stages.
- Sending the acknowledgment email and timed follow-up emails.
- Sending internal notifications and reminders.
- Stopping follow-up when a prospect replies or books.
- Writing timestamps and status fields for KPI tracking.

Human Review Points

- Miklos should approve all outreach templates before launch.
- Miklos should review sample AI-generated personalization before enabling it at scale.
- Leads with missing, conflicting, or unclear data should route to manual review.
- Any lead asking pricing, implementation, or business-specific questions should be handled manually.
- Qualified leads should be reviewed by Miklos before proposal, contract, or custom scope decisions.
- Consent logic and privacy language should be verified before automated nurture is enabled.

Make.com Build Blueprint

Trigger: New Facebook lead form submission and/or new WordPress lead form submission.

Required input fields:

- First name.
- Last name.
- Email.
- Phone, if collected.
- Company name, if collected.
- Lead source.
- Campaign name.
- Ad name or ad set name, if available.
- Service interest or offer selected, if available.
- Consent status.
- Submission timestamp.

Make.com modules to use:

- Facebook Lead Ads trigger or webhook trigger.
- WordPress form webhook trigger, if website forms are included.
- Data normalization step to standardize names, email address, source, campaign, and timestamp fields.
- Brevo search contact module.
- Brevo create or update contact module.
- Brevo add tags or update attributes module.

- Router by source, offer interest, lead completeness, and consent status.
- Email send module for immediate acknowledgment.
- Delay module for timed follow-up.
- Email send module for follow-up sequence step one.
- Email send module for follow-up sequence step two.
- Internal notification email to Miklos.
- Optional task or reminder creation for manual review.
- Optional reporting row written to Google Sheets or Airtable.

Filters / routers:

- If email is missing, route the lead to manual review and do not send an email.
- If consent is missing or unclear, do not enroll the contact in marketing nurture.
- If an existing contact is found in Brevo, update the record instead of creating a duplicate.
- If the lead replies or books a call, stop remaining automated follow-up emails.
- If the lead indicates premium implementation interest, mark it for same-day manual review.
- If the lead source is a free lead magnet, route to an education-focused nurture path rather than direct sales follow-up unless buying intent is explicit.

Data fields to write back:

- Brevo contact ID.
- Lead status.
- Pipeline stage.
- Source and campaign metadata.
- Offer interest.
- Consent status.
- First response sent timestamp.
- Follow-up step completed.
- Owner.
- Last activity timestamp.
- Reply status.
- Booking status, if available.

Human review points:

- Review leads with incomplete or conflicting data.
- Approve final email templates and personalization logic before launch.
- Take over manually when a lead replies with specific business context, pricing questions, implementation questions, or objections.
- Manually qualify leads before proposal, contract, or implementation offer discussions.

Error handling / fallback:

- If the Brevo API fails, retry automatically and send an internal alert if the retry fails.
- If an email send fails, log the failure and notify Miklos.
- If a duplicate contact conflict occurs, route the record to manual review.
- If a Facebook payload is missing required fields, store the raw payload for troubleshooting and alert Miklos.
- If the workflow cannot verify consent status, avoid marketing nurture and flag the contact for review.

Logging and KPI tracking:

- Lead received timestamp.
- Acknowledgment sent timestamp.
- Time to first response.

- Reply status.
- Booking status.
- Qualification status.
- Conversion to paid assessment.
- Campaign and source attribution.
- Error count by workflow step.

What to test before launch:

- A new lead with complete data creates a new Brevo contact and sends the acknowledgment email.
- An existing lead updates the existing Brevo contact without duplication.
- A lead with missing email is routed to manual review and no email is sent.
- A lead reply stops remaining automated follow-up steps.
- A lead without valid consent is not enrolled in nurture.
- A high-intent lead is tagged correctly and triggers priority notification to Miklos.
- An API or email sending error triggers a clear internal alert.

First Build Requirements

Accounts/access needed:

- Make.com access with permission to create scenarios, webhooks, routers, and error handling.
- Brevo access with permissions for contacts, attributes, tags, email templates, and pipeline configuration.
- Facebook Ads / Meta Lead Ads access with permission to connect lead forms.
- WordPress admin or form plugin access if website lead forms are included.
- Reporting destination access, such as Google Sheets, Airtable, Looker Studio, or Databox.
- Scheduling tool access if booking automation is added, such as Calendly, Cal.com, TidyCal, or Acuity.

Fields needed:

- Name.
- Email.
- Phone, if used.
- Company.
- Country, if relevant.
- Lead source.
- Campaign.
- Offer interest.
- Consent status.
- Pipeline stage.
- Owner.
- Last contact date.
- Reply status.
- Booking status.

Templates needed:

- Immediate acknowledgment email.
- Follow-up email step one.
- Follow-up email step two.

- Internal notification template for Miklos.
- Manual review alert template.
- Content brief prompt template for the later content workflow.
- Ad performance summary prompt template for the later reporting workflow.

Decisions needed:

- What qualifies a lead for same-day manual review.
- How many follow-up emails should be sent and over what timing.
- Whether to include a booking link in the first email.
- Which Brevo pipeline stages should exist.
- Which tags should be used for source, offer, and lead status.
- Which content pillars should guide future content planning.
- Which ad metrics matter most for weekly review.

Compliance/consent items to verify:

- Exact legal or compliance requirement referenced during intake.
- Email consent basis for automated follow-up and marketing nurture.
- Privacy policy coverage for AI-assisted processing and automation.
- Data retention rules for lead data in Brevo and Make.com.
- Whether UK or EU data protection obligations apply based on target markets.
- Whether AI tools used for drafting or summarization are approved for the type of lead data being processed.

Test cases before launch:

- Lead captured from Facebook with valid consent.
- Lead captured from WordPress form.
- Duplicate lead update path.
- Missing email/manual review path.
- Reply detected and automation stopped.
- Unsubscribe or opt-out respected in Brevo.
- Internal alert sent when workflow errors occur.

7. Success Criteria

The first phase should be judged by operational improvement, not by unsupported projections. The goal is to make the sales and follow-up system faster, more reliable, and easier to measure.

- **First-response time:** Reduce the delay from approximately one day to same-day response, with near-immediate acknowledgment for eligible leads.
- **Lead-to-call booking rate:** Track whether faster acknowledgment and structured follow-up improve the percentage of leads who book a Zoom call.
- **Follow-up reliability:** Measure the percentage of new leads that receive the correct acknowledgment and follow-up sequence without manual intervention.
- **CRM completeness:** Track the percentage of leads with required fields, source tags, consent status, and pipeline stage completed.
- **Manual time saved:** Track weekly time spent on manual lead handling before and after implementation.
- **Lead loss reduction:** Track the number of leads that go uncontacted or require late manual rescue.
- **Reporting clarity:** Track whether campaign source, lead quality, booking status, and conversion status can be reviewed weekly without manual reconstruction.

- **Content consistency:** In the second phase, track approved posts created per week and nurture emails sent to lead magnet subscribers.

8. Implementation Scope

In Scope

- Facebook lead capture automation.
- Optional WordPress form lead capture if the form is ready and accessible.
- Brevo contact creation, update, tagging, and attribute mapping.
- Immediate acknowledgment email.
- Short follow-up email sequence.
- Basic qualification fields and routing logic.
- Internal notifications and task reminders for Miklos.
- Basic logging of timestamps, lead status, booking status, and workflow errors.
- Simple reporting export to Google Sheets, Airtable, or similar destination.
- Later expansion into content planning and Facebook ad reporting summaries.

Out of Scope for the First Build

- Autonomous sales closing.
- Autonomous ad budget, targeting, or creative changes.
- Client-side AI deployments for Miklos's customers.
- Complex website chatbot deployment across multiple channels.
- Phone automation or missed-call recovery unless a phone-based lead issue is later confirmed.
- Contract or proposal automation rebuild, since that does not appear to be the immediate bottleneck.
- Full data warehouse or advanced attribution system.

Required Inputs

- Current Facebook lead form structure.
- Current WordPress form structure, if included.
- Brevo contact fields, tags, and current pipeline setup.
- Existing email copy or preferred tone for outreach.
- Definition of a qualified lead.
- Consent and privacy language currently used on forms and the website.
- Preferred ad reporting metrics.
- Preferred follow-up timing and booking process.

Access Needed

- Make.com account access.
- Brevo account access.
- Facebook Ads / Meta Lead Ads access.
- WordPress access if website forms are included.

- Scheduling tool access if booking links or booking status are integrated.
- Google Sheets, Airtable, Looker Studio, or other reporting destination access if KPI logging is included.

Realistic Boundaries

The first build should be intentionally narrow. It should focus on lead response, clean CRM records, follow-up reliability, and measurable status tracking. The workflow should not attempt to replace founder judgment. It should protect Miklos's time and make his manual involvement more timely and better informed.

Technical Owner Notes

- Use stable field names and avoid hard-coding temporary campaign names where possible.
- Separate lead source tags from lifecycle status tags so reporting remains clean.
- Include a manual review route for missing email, unclear consent, duplicate conflicts, and high-value edge cases.
- Use timestamp fields for received, acknowledged, replied, booked, and last activity events.
- Keep email templates in Brevo where possible so they are easier to edit without rebuilding the Make.com workflow.
- Use Make.com error handlers and alerts rather than allowing silent failures.
- Document the workflow steps after launch so future support or delegation is easier.

Compliance and Review Boundaries

- Consent mapping must be verified before automated marketing nurture is enabled.
- Unsubscribe and opt-out behavior must be handled through Brevo and respected across follow-up paths.
- AI-generated copy should be reviewed before use in live outreach.
- Lead data shared with AI tools should be minimized and handled according to the applicable privacy policy and data processing requirements.
- Any UK or EU lead handling should be reviewed for relevant data protection obligations.

9. Recommended AI Tools and AI Agents

Workflow Automation and Orchestration

Why it fits: The first business problem is a workflow problem: leads need to move from capture to CRM to email response to founder notification without delay.

What it could do: Trigger on new leads, normalize data, update Brevo, send emails, route exceptions, log KPIs, and connect reporting tools.

Recommended tools: Make.com is the best first choice because it is already suitable for the recommended workflow. Zapier is simpler for basic automations but may become limiting for advanced routers and error handling. n8n is a strong option if deeper technical control or self-hosting becomes important later.

When to use it: Use immediately for the first speed-to-lead workflow.

When to postpone: Do not move to a more technical platform until Make.com becomes a constraint.

Implementation complexity: Low to medium.

Verify before building: API access, field mapping, Meta lead form permissions, Brevo module capabilities, and error handling requirements.

CRM and Email Follow-Up

Why it fits: Lead handling needs one central source of truth for contact status, source, consent, follow-up, and booking progress.

What it could do: Store contacts, segment leads, send email templates, manage simple pipeline stages, and track engagement.

Recommended tools: Brevo should remain the starting platform. HubSpot, Pipedrive, and GoHighLevel are possible future options if pipeline complexity, sales reporting, or multi-channel campaign needs outgrow Brevo.

When to use it: Use Brevo immediately for contact creation, tagging, attributes, and email follow-up.

When to postpone: Postpone CRM migration unless Brevo cannot support the required pipeline, reporting, or automation behavior.

Implementation complexity: Low to medium if staying in Brevo; medium to high if migrating CRM.

Verify before buying or migrating: Pipeline needs, email deliverability, segmentation, automation limits, contact volume, data export/import requirements, and integration support.

Scheduling and Booking

Why it fits: If leads are ready to book, the workflow should make scheduling simple and measurable.

What it could do: Add booking links to follow-up emails, capture booking status, and stop follow-up once a call is scheduled.

Recommended tools: Calendly, Cal.com, TidyCal, and Acuity are all viable. The best choice depends on current usage, payment needs, calendar preferences, and integration quality.

When to use it: Add scheduling if the current booking process creates friction or if booking status should be tracked automatically.

When to postpone: Postpone if Miklos prefers to qualify manually before offering a booking link.

Implementation complexity: Low.

Verify before buying: Calendar integration, Zoom integration, redirect behavior, webhook support, and whether Brevo or Make.com can receive booking status reliably.

AI Writing, Summarization, and Controlled Reasoning

Why it fits: AI can reduce time spent drafting follow-ups, content, summaries, and reports, while Miklos remains the final decision-maker.

What it could do: Draft email templates, summarize lead context, generate content ideas, create nurture sequences, and summarize campaign performance.

Recommended tools: ChatGPT, OpenAI API, and Claude. ChatGPT Projects can be useful for

maintaining brand voice, prompt libraries, email examples, and content pillars. Claude can be useful for long-form content refinement and structured writing.

When to use it: Use immediately for template drafting and internal summaries, with human review.

When to postpone: Postpone fully autonomous personalization until template quality, consent rules, and brand voice are stable.

Implementation complexity: Low for manual drafting; medium for API-based workflow integration.

Verify before using: Data privacy settings, whether personal lead data is needed, output review process, tone guidelines, and hallucination risk controls.

Call Capture and Sales Notes

Why it fits: Sales calls contain important buyer context that can improve follow-up, proposal quality, and content ideas.

What it could do: Record Zoom calls, transcribe conversations, summarize next steps, extract objections, and create follow-up drafts.

Recommended tools: Fathom, Fireflies, and Otter.

When to use it: Add after the lead workflow is stable, especially if manual call notes are inconsistent or follow-up takes too long.

When to postpone: Postpone if call volume is still low or if consent/recording requirements are not clear.

Implementation complexity: Low to medium.

Verify before buying: Recording consent requirements, Zoom integration, export options, CRM integration, and data retention settings.

Content Planning and Knowledge Management

Why it fits: Content planning is currently a high-friction recurring task. A structured AI-assisted system can reduce decision fatigue and improve consistency.

What it could do: Store content pillars, generate post ideas, create drafts, maintain an approval queue, repurpose posts, and organize lead nurture topics.

Recommended tools: Notion, Airtable, Google Drive/Docs, SharePoint, Notion AI, and ChatGPT Projects. Canva can support visual creation, and Nano Banana or similar image-generation/editing tools can support creative variations when brand-safe usage is defined.

When to use it: Start in the second phase after the lead response workflow is live.

When to postpone: Postpone elaborate content automation until content pillars and review rules are defined.

Implementation complexity: Low to medium.

Verify before building: Preferred content calendar format, target channels, brand voice, approval process, and whether LinkedIn should be included immediately.

Chatbots and Website Assistants

Why it fits: A website assistant could eventually answer common questions, capture leads, and route prospects to the correct offer.

What it could do: Provide FAQ responses, collect visitor information, suggest relevant

resources, and escalate qualified inquiries.

Recommended tools: Tidio, Chatbase, Voiceflow, and Botpress.

When to use it: Consider after lead capture, CRM structure, and messaging are stable.

When to postpone: Postpone for the first build because the immediate problem is paid lead response, not website visitor support.

Implementation complexity: Medium.

Verify before buying: Knowledge base quality, escalation behavior, integration with Brevo, privacy requirements, and risk of inaccurate answers.

Voice, Phone, and SMS Agents

Why it fits: If phone inquiries or missed calls become a meaningful lead source, voice and SMS automation could reduce missed opportunities.

What it could do: Answer calls, qualify leads, send SMS follow-ups, transcribe conversations, and route urgent prospects.

Recommended tools: Retell AI, Aircall, OpenPhone, and Twilio.

When to use it: Use only if phone-based lead loss becomes clear.

When to postpone: Postpone now because the current bottleneck is Facebook lead follow-up and founder availability, not confirmed missed calls.

Implementation complexity: Medium to high.

Verify before buying: Call volume, phone workflow, consent requirements, escalation rules, call recording rules, and SMS compliance.

Reporting and Analytics

Why it fits: The business needs a clearer view of which campaigns and lead sources create conversations, bookings, and customers.

What it could do: Pull ad metrics, log lead events, summarize weekly performance, and connect lead source to booking status.

Recommended tools: Google Sheets, Airtable, Looker Studio, Databox, and Facebook Ads reporting. CallRail may become useful if phone attribution becomes important.

When to use it: Start with simple KPI logging in the first build, then add a weekly ad performance summary in the second phase.

When to postpone: Postpone advanced attribution dashboards until basic lead status and booking data are reliable.

Implementation complexity: Low for spreadsheet logging; medium for dashboards.

Verify before building: Metrics that matter, campaign naming conventions, booking status availability, and how customer conversion will be recorded.

Research and Prospect Context

Why it fits: Miklos may benefit from faster context gathering before sales calls or custom proposals.

What it could do: Research a company, summarize a prospect's market, identify likely automation opportunities, and prepare sales call notes.

Recommended tools: Perplexity, ChatGPT Deep Research, and Clay.

When to use it: Add after the CRM workflow captures enough structured lead data to trigger useful research.

When to postpone: Postpone if lead volume is still low or manual review is sufficient.

Implementation complexity: Medium.

Verify before buying: Data accuracy requirements, enrichment sources, cost per lookup, and whether enrichment complies with privacy expectations.

Documents, Proposals, and Contracts

Why it fits: Proposal and contract workflows can benefit from automation, but this does not appear to be the most urgent bottleneck.

What it could do: Generate proposal drafts, send documents for signature, and track document status.

Recommended tools: PandaDoc, DocuSign, and HoneyBook.

When to use it: Use later if proposal creation or signature follow-up becomes a constraint.

When to postpone: Postpone if existing proposal and contract processes are already adequate.

Implementation complexity: Medium.

Verify before buying: Existing contract process, payment workflow, template needs, and integration with Brevo or CRM.

Reviews, Reputation, and Local Presence

Why it fits: If the business relies on testimonials, social proof, or local search visibility, review gathering can be automated.

What it could do: Request reviews after successful engagements, route feedback, and track review status.

Recommended tools: Google Business Profile, Podium, NiceJob, and Birdeye.

When to use it: Consider once delivery volume and testimonial collection become recurring tasks.

When to postpone: Postpone until the lead conversion workflow and nurture system are stable.

Implementation complexity: Low to medium.

Verify before buying: Review platform relevance, customer journey timing, testimonial permissions, and brand fit.

Payments and Accounting

Why it fits: Payment and accounting automation can save admin time, but it is not the first revenue bottleneck.

What it could do: Trigger invoices, record payments, notify about failed payments, and sync customer records.

Recommended tools: QuickBooks, Stripe, and Xero.

When to use it: Add when payment follow-up or invoice admin becomes a recurring constraint.

When to postpone: Postpone for now because lead response and sales follow-up are more urgent.

Implementation complexity: Medium.

Verify before buying: Current payment process, tax requirements, accounting setup, and integration needs.

Technical Build Support

Why it fits: If future workflows require custom scripts, API work, webhooks, or data transformations, coding assistants can speed implementation.

What it could do: Help write scripts, debug API payloads, create custom functions, and document technical workflows.

Recommended tools: Codex, GitHub Copilot, and Cursor.

When to use it: Use only when Make.com modules are insufficient or custom integration work is needed.

When to postpone: Postpone for the first build unless a technical blocker appears.

Implementation complexity: Medium to high depending on custom code requirements.

Verify before using: Code review process, credential handling, API limits, security practices, and maintainability.

10. Future AI Opportunity Map

Now: First Workflow to Build

- Immediate Facebook lead capture into Brevo.
- Contact creation/update with source and offer tagging.
- Consent-aware acknowledgment email.
- Short follow-up sequence.
- Internal notification and manual takeover path.
- Basic KPI logging for response time, reply status, booking status, and campaign source.

Next: 30–90 Day Opportunities

- **Lead qualification and routing:** Add clearer pipeline stages, qualification rules, and different paths for lead magnet, paid assessment, and implementation interest.
- **Content planning copilot:** Build a monthly content calendar with AI-assisted ideas, drafts, approval queue, and repurposing for Facebook and LinkedIn if desired.
- **Lead magnet nurture:** Create a structured email path for people who download free resources but do not immediately book.
- **Facebook ad reporting support:** Pull campaign performance into a recurring report and generate a short summary for review.
- **Call summary workflow:** Use Fathom, Fireflies, or Otter to capture sales call notes and draft follow-up actions.

Later: Strategic AI and Agent Opportunities

- **Sales preparation assistant:** An internal agent that summarizes each lead, campaign source, form answers, CRM history, likely needs, and suggested discovery questions before a call.
- **Offer and delivery knowledge base:** A searchable internal assistant for frameworks, past deliverables, FAQs, scripts, prompts, and proposal components.
- **Website assistant:** A controlled chatbot that answers common questions, routes visitors, and captures leads once messaging and CRM rules are stable.

- **Ad decision assistant:** A reporting agent that flags underperforming campaigns and suggests areas for review, while keeping final campaign changes manual.
- **Client delivery accelerator:** Reusable AI-assisted templates and workflows for future customer assessments and implementation services, developed after the internal operating system is stable.

11. 90-Day AI Leverage Roadmap

0–30 Days: Prove the First Workflow

- Map the current Facebook lead form fields and Brevo contact structure.
- Define required fields, tags, pipeline stages, and lead status rules.
- Write and approve the immediate acknowledgment and two follow-up emails.
- Build the Make.com workflow for lead capture, Brevo update, email response, and internal notification.
- Add error handling for missing email, unclear consent, duplicate contacts, and failed API calls.
- Test with controlled sample leads before going live.
- Track time to first response, reply rate, booking status, and workflow errors.

30–60 Days: Stabilize and Expand

- Review the first 2–4 weeks of workflow data and identify failure points.
- Refine email copy based on actual lead replies and objections.
- Add or improve booking link logic if scheduling friction remains.
- Build a clearer Brevo pipeline for lead magnet, assessment, and implementation interest.
- Add a simple reporting sheet for source, campaign, response time, booking status, and qualification status.
- Begin a lightweight lead magnet nurture sequence for non-booked leads with valid consent.

60–90 Days: Build the Operating Layer

- Launch a content planning copilot with monthly content pillars, weekly ideas, draft generation, and approval workflow.
- Repurpose approved content across Facebook and LinkedIn if both channels are part of the plan.
- Add weekly Facebook ad performance summaries using Make.com, Google Sheets or Looker Studio, and ChatGPT-generated analysis.
- Introduce call recording and summarization if sales call volume justifies it.
- Create a simple internal knowledge base for offers, common objections, follow-up templates, and delivery notes.

90+ Days: Strategic Agent Opportunities

- Build a sales preparation assistant that creates a pre-call brief for each qualified lead.
- Create a controlled website assistant once FAQs, offer pages, and escalation rules are

- ready.
- Develop an ad decision-support agent that recommends review actions without making autonomous campaign changes.
- Build reusable client delivery support tools for AI assessments and implementation projects.
- Evaluate whether the CRM should remain in Brevo or move to a more sales-focused platform such as HubSpot, Pipedrive, or GoHighLevel.

12. Quick Win Plan

Day 1: Confirm Workflow Inputs and Decisions

- **Action:** Review Facebook lead forms, WordPress forms, current Brevo fields, tags, and any existing pipeline stages.
- **Expected outcome:** Clear field map and list of missing CRM attributes.
- **Required input/tool:** Facebook Ads access, WordPress access, Brevo access.
- **Suggested owner:** Miklos with technical implementation support.

Day 2: Define Lead Rules and Draft Templates

- **Action:** Define qualified lead criteria, same-day review rules, consent handling, and follow-up timing. Draft acknowledgment and two follow-up emails.
- **Expected outcome:** Approved workflow logic and first version of email templates.
- **Required input/tool:** Brevo, ChatGPT or Claude for drafting support, current brand voice examples.
- **Suggested owner:** Miklos for decisions and approval; implementer for technical notes.

Day 3: Configure Brevo Structure

- **Action:** Create or clean required fields, tags, attributes, and pipeline stages in Brevo.
- **Expected outcome:** Brevo is ready to receive structured lead data from Make.com.
- **Required input/tool:** Brevo admin access.
- **Suggested owner:** Technical implementer, with Miklos approving naming conventions.

Day 4: Build Make.com Workflow

- **Action:** Build trigger, data normalization, Brevo search/create/update, routers, email send steps, delay steps, and internal notification.
- **Expected outcome:** Working draft workflow ready for testing.
- **Required input/tool:** Make.com, Facebook Lead Ads, Brevo, optional Google Sheets or Airtable.
- **Suggested owner:** Technical implementer.

Day 5: Add Error Handling and KPI Logging

- **Action:** Add missing email route, duplicate conflict route, consent checks, API failure alerts, and KPI timestamp logging.

- **Expected outcome:** Workflow is safer, more measurable, and easier to debug.
- **Required input/tool:** Make.com, Brevo, reporting destination.
- **Suggested owner:** Technical implementer.

Day 6: Test End-to-End

- **Action:** Run test cases for complete lead, duplicate lead, missing email, unclear consent, high-intent lead, booking path, and email failure handling.
- **Expected outcome:** Verified workflow with a launch checklist and issue log.
- **Required input/tool:** Test lead submissions, Brevo test contact review, Make.com run history.
- **Suggested owner:** Technical implementer with Miklos reviewing outputs.

Day 7: Launch and Monitor

- **Action:** Turn on the live workflow, monitor the first leads closely, and confirm that emails, tags, notifications, and timestamps are working.
- **Expected outcome:** Live speed-to-lead system with manual monitoring during the initial rollout.
- **Required input/tool:** Make.com run history, Brevo contact view, email inbox, reporting sheet.
- **Suggested owner:** Miklos for business review; technical implementer for monitoring and fixes.

13. Next-Step Opportunities

1. Structured Lead Qualification in Brevo

Add clear stages and tags for lead magnet subscriber, new paid lead, contacted, replied, booked, qualified, proposal, won, lost, and nurture. This will make the business easier to manage and will support future delegation or VA support.

2. Lead Magnet Nurture Sequence

Create a short educational nurture path for prospects who download a free resource but do not book immediately. The sequence should build trust, clarify the value of the paid assessment, and invite a call without over-automating the sales process.

3. Content Planning and Repurposing System

Build a monthly content workflow using content pillars, AI-generated ideas, draft copy, approval steps, and repurposing across Facebook and LinkedIn if both channels are active. This directly addresses the draining and inconsistent content process.

4. Weekly Facebook Ad Reporting Summary

Connect Facebook Ads metrics to a reporting destination and generate a weekly summary

covering spend, leads, cost per lead, lead-to-booking rate, and campaigns requiring review. AI can summarize patterns, while Miklos keeps final decision-making control.

5. Sales Call Note and Follow-Up Assistant

Add Fathom, Fireflies, or Otter to capture Zoom calls, summarize key points, identify follow-up actions, and draft post-call emails. This becomes more valuable as booking volume increases.

Postpone for Now

- Fully autonomous sales agents that reply, negotiate, or close without Miklos approval.
- Autonomous Facebook ad budget or targeting changes.
- Complex website chatbot deployment before CRM structure and messaging are stable.
- Voice agents unless missed calls become a documented lead-loss issue.
- Accounting, invoice follow-up, or payment automation unless administrative finance work becomes a repeated constraint.

14. Closing Recommendation

MiklosKovacs.io should begin with the workflow that protects the most immediate revenue opportunity: fast, consistent follow-up for paid leads. The business does not need a large AI transformation first. It needs a reliable operating layer that captures every new lead, responds immediately, organizes CRM data, and alerts Miklos when human judgment is required.

The first build should be intentionally practical: Make.com connected to Facebook Lead Ads and Brevo, with consent-aware email follow-up, source tagging, internal notifications, error handling, and KPI logging. Once this is stable, the next layer should expand into structured lead qualification, lead magnet nurture, content planning support, and ad reporting summaries.

The main items to postpone are autonomous sales closing, autonomous ad changes, broad chatbot deployment, and phone agents. Those may become useful later, but they should not distract from the current highest-leverage problem: responding to interested prospects faster and managing the pipeline more consistently.

Recommended First Move: Build a phase-1 speed-to-lead workflow in Make.com connected to Facebook Lead Ads and Brevo, with immediate acknowledgment, structured CRM tagging, internal notification, a short follow-up sequence, and KPI tracking for the first 2–4 weeks.