

The AI Speed-to-Lead Engine

Build the 24/7 AI SMS system that helps home service businesses respond to leads instantly and win more jobs.

Quick Start Guide

No Coding Required

Phase 1: Account Setup Prerequisites

Before opening Make.com, you need to set up three essential accounts. Complete these steps in order—each one provides credentials you'll need for the automation build.

01

OpenAI Account Setup

Visit platform.openai.com and create an account. Navigate to Settings → Billing and add a credit card. Deposit \$5 initial credit (this will last months). Go to API Keys in the left menu and click "+ Create new secret key". Name it "Make_Integration".

CRITICAL: Copy this key immediately and save it securely. You cannot view it again after closing the window.

02

Twilio Account Setup

Visit [twilio.com](https://www.twilio.com) and sign up. Add billing information and deposit \$20 to exit trial mode. On the console dashboard, purchase a phone number—ideally with your client's local area code (\$1.15/month).

Locate your Account Info on the dashboard. Copy and save both your **Account SID** and **Auth Token**. You'll need these long strings for configuration.

03

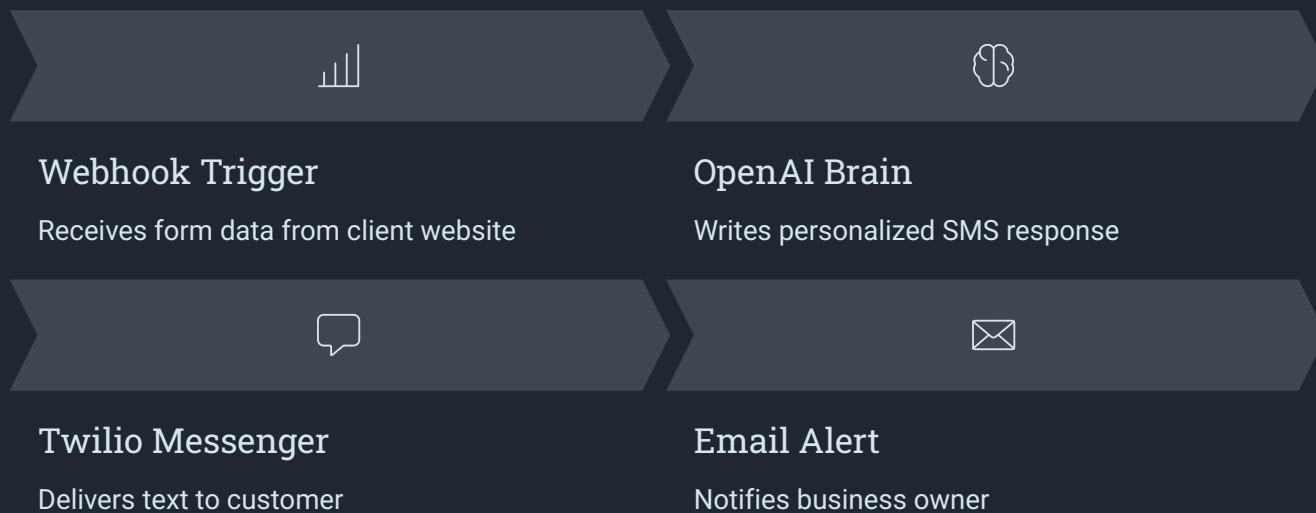
Make.com Account

Sign up at [make.com](https://www.make.com) with a free account for building and testing. You'll upgrade to the Core plan (\$9/month) once you have active paying clients.

The free tier includes enough operations to fully build and test your system before committing to a paid plan.

Phase 2: Building Your Master Blueprint

You'll build this automation once, then clone it for every client. Think of it as your reusable template. The system follows a simple four-step flow:



Step 1: Create the Webhook Trigger

Log into Make.com and click "Create a new scenario". Click the purple plus button, search for "Webhooks", and select "Custom webhook". In the configuration, click "Add" and name it **Master Blueprint Hook**. Make generates a unique URL—this is the address that will receive form submissions.

Important: Copy this URL and save it. You'll need it for testing and later for connecting client websites.

Configuring OpenAI and Twilio Modules

Step 2: The AI Brain (OpenAI)

Add a module to the right of your webhook. Search for "OpenAI" and select "Create a Completion (Chat Notifications)". Click "Add" for connection and paste your API key from Phase 1. Choose **gpt-4o-mini** as the model—it's fast, affordable, and intelligent enough for conversational SMS.

📄 System Prompt Template

In the Messages section, set Role to "System" and paste this prompt:

You are a friendly, efficient office assistant for 'Apex Roofing'. A potential new client named [Name Variable Here] just submitted a website form regarding [Service Variable Here]. Your job is to write a short, 1-2 sentence SMS reply to them.

Instructions:

- Acknowledge you received their request
- Ask ONE simple, relevant qualifying question to start a conversation
- Do NOT sound like a robot. Be casual but professional
- Keep it under 160 characters total
- End with the company name, e.g., "- Team Apex"

You'll replace the bracketed variables with actual data during testing.

Step 3: The SMS Delivery (Twilio)

Add another module and search for "Twilio". Select "Send a Message". Click "Add" for connection, name it, and paste your Account SID and Auth Token. In the "From" field, select your Twilio phone number from the dropdown.

For the "Body" field, click inside it. A panel appears showing data from previous steps. Navigate to the OpenAI section, expand **choices[]**, then **message**, and click **content**. This purple block represents the AI-generated text that will be sent.

Testing Your Automation Blueprint

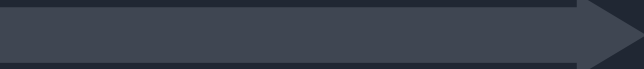
Step 4: Email Notification Setup

Add a final module and search for "Email". Select "Send an Email" and connect your Google or Outlook account. For testing, use your own email address in the "To" field. Set the subject to "⚡ **HOT LEAD: Immediate Response Sent!**"

In the body, write a message like: "A new lead just submitted a form. Our system instantly sent them this text message: [insert OpenAI content block here]. Check your business phone for their reply!"

Phase 3: Live Testing Process

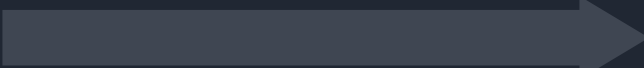
Click the blue "Run once" button at the bottom left of Make. The webhook module starts spinning, waiting for incoming data. Now you need to "teach" Make what data structure to expect.



Trigger the Webhook

Open a new browser tab. Paste your webhook URL and add test parameters: ?
`name=JohnTest&phone=+15555555555&service=RoofLeak`

Replace the phone number with your actual cell phone to receive the test SMS.



Verify Success

The browser should display "Accepted". Return to Make.com and confirm all module circles turned green, indicating successful execution.



Map Variables

Now that Make understands the data structure, open the OpenAI module. Replace [Name Variable Here] with the purple "name" block from webhook data. Do the same for [Service Variable Here] using the "service" block.



Finalize Twilio

Open the Twilio module and map the "phone" block from webhook data into the "To" field. Save your scenario. Your Master Blueprint is complete.

Phase 4: Deploying for Clients

The Sales Pitch

"I can install a tool that texts your website leads in under 60 seconds, 24/7, so you stop losing jobs to faster competitors."

This solves a real pain point that costs contractors thousands in lost revenue every month. Frame it as essential infrastructure, not optional technology.

30-Minute Deployment Process

1. **Clone Your Blueprint:** In Make dashboard, find Master Blueprint, click three dots → Clone. Name it "[Client Name] - Speed to Lead"
2. **Customize OpenAI Prompt:** Change 'Apex Roofing' to client's business name. Adjust the qualifying question for their industry
3. **Update Email Notification:** Change recipient to client's email address
4. **Extract Webhook URL:** Open first module and copy the unique webhook address
5. **Website Integration:** Email the URL to your client with instructions to paste it into their website form's webhook or notification settings

If the client doesn't know how to add the webhook to their website, offer to do it for them—that hands-on service justifies your setup fee. Most website builders like WordPress, Wix, or Squarespace have simple webhook integration options in their form settings.

Pricing Structure & Revenue Model

\$497

Setup Fee (Low Tier)

For smaller contractors or price-sensitive markets. Still profitable at this level.

\$997

Setup Fee (Premium)

For established businesses with higher lead volume. Emphasize ROI and competitive advantage.

\$97

Monthly Retainer (Basic)

Covers monitoring, SMS costs, OpenAI usage, and minor template tweaks.

\$197

Monthly Retainer (Plus)

Includes everything in Basic plus monthly optimization reports and priority support.

What's Included in Setup Fee

Technical Configuration

- Cloning and customizing the Make scenario
- Programming the AI prompt for their specific business
- Connecting to their website contact form
- End-to-end testing with real phone numbers

Monthly Retainer Deliverables

- 24/7 monitoring to ensure system uptime
- Coverage of Twilio SMS costs and OpenAI API usage
- Minor adjustments to text templates upon request
- Monthly performance reports (Premium tier)

Pro Tip: Position this as essential business infrastructure, not optional software. A single captured lead can be worth \$500-\$5,000 in revenue for home service businesses, making your monthly retainer an easy decision.

Next Steps: Your Action Plan

Week 1: Build Your System

Set up your three accounts (OpenAI, Twilio, Make.com). Build and test your Master Blueprint using your own phone number. Send yourself 5-10 test messages to ensure everything works smoothly.

1

2

Week 2: Find Your First Client

Reach out to local roofing, HVAC, plumbing, or electrical contractors. Lead with the pain point: "You're losing jobs to competitors who respond faster." Offer a discounted setup (\$297) for your first client as a case study.

3

Week 3: Deploy & Document

Clone your blueprint, customize it, and integrate with their website. Document the results—response times, lead engagement rates, and testimonials. This becomes your marketing material.

4

Week 4: Scale Your Service

With a successful case study, approach 10 more contractors. At \$497 setup + \$147/month recurring, just 5 clients generates \$3,220 upfront and \$735/month ongoing. Build from there.

"The money is in the recurring monthly retainer. Setup fees are nice, but 10 clients at \$147/month creates \$1,470 in predictable monthly revenue. That's the real business model."

You now have everything you need to build and sell this automation. The technical work takes 2-3 hours to master. The real opportunity is in finding home service businesses who are bleeding money to faster competitors—and positioning yourself as the solution.

[Start Building on Make.com](#)

[Get Your OpenAI API Key](#)