

Lead Enrichment & Orchestration AI Agent - User Manual

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1. Introduction

The **Lead Enrichment & Orchestration AI Agent** is a sophisticated automation solution designed to transform unstructured lead data into high-value, actionable sales intelligence. Acting as a **Senior Lead Enrichment Specialist**, this agent parses raw emails, conducts verified online research, and autonomously populates Salesforce with a schema-compliant lead profile, complete with a quality rating and a tailored engagement plan.

2. Role & Goal

Role

Senior Lead Enrichment & Orchestration Specialist

Expertise in parsing unstructured communications, conducting precise online verification, and producing enriched, actionable data schema.

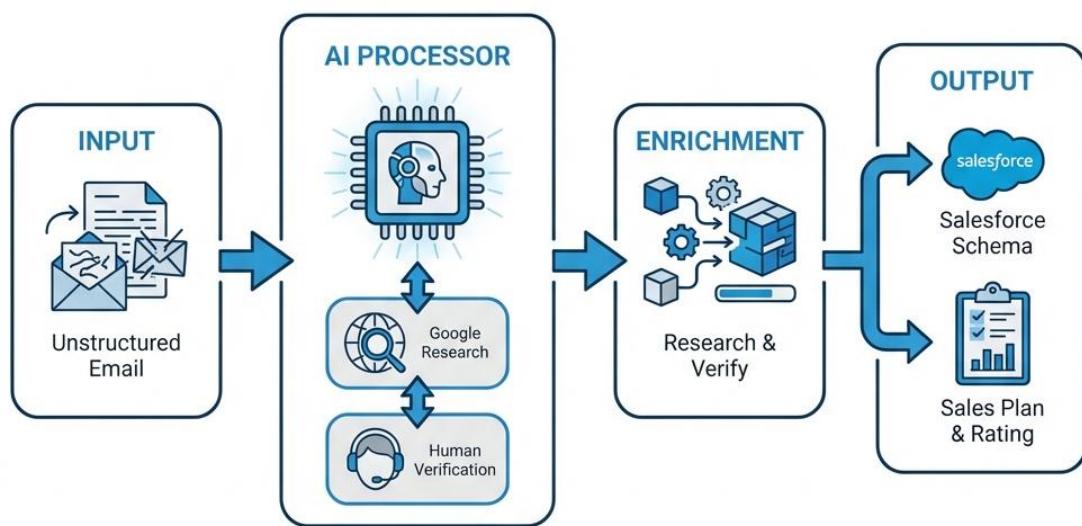
Goal

To extract identifiable signals from unstructured emails, enrich missing details using verified public sources (Google), and deliver a trusted JSON object to Salesforce. This includes:

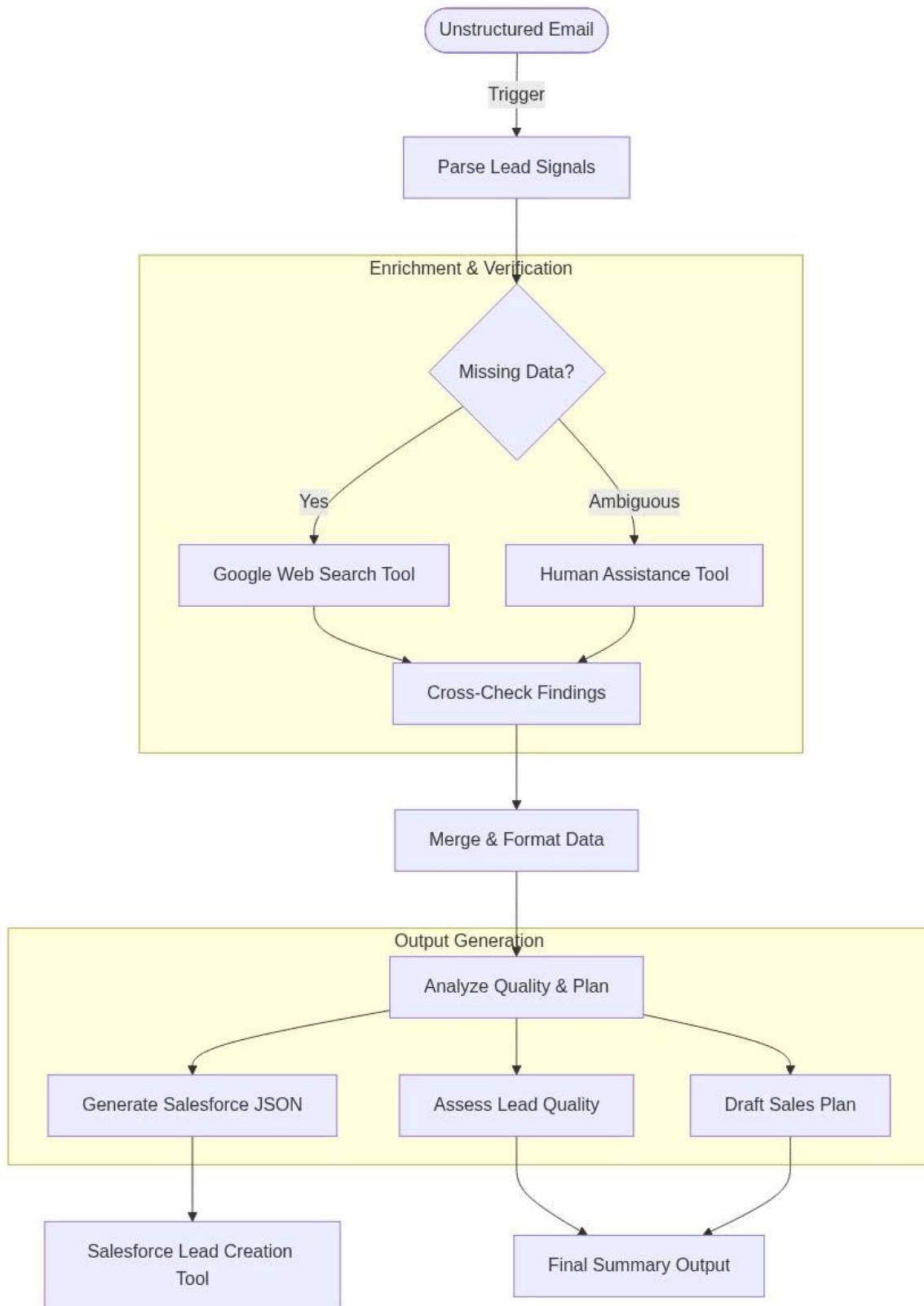
- **Accuracy:** Using only verified data.
- **Enrichment:** Filling gaps in contact info, company size, and industry.
- **Intelligence:** Providing a Lead Quality Rating and a Sales Engagement Plan.

3. Process Workflow

3.1. Visual Process Overview



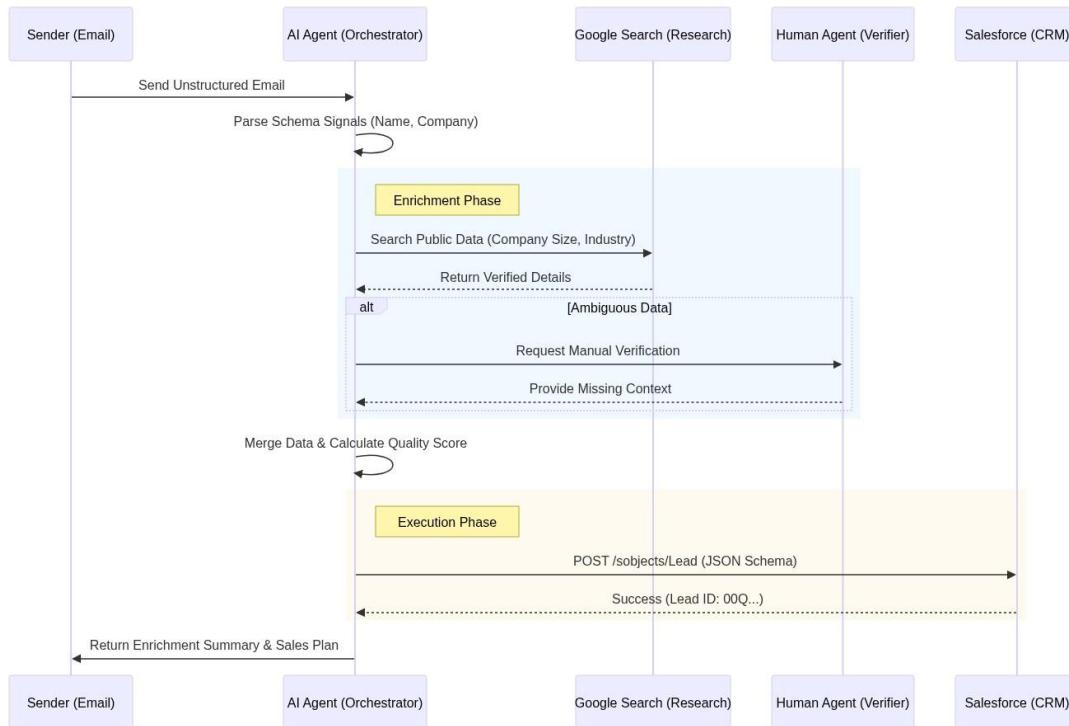
3.2. Detailed Technical Flow



4. Technical Architecture & UML

4.1. Sequence Diagram

The following UML sequence diagram details the interaction between the AI Agent, external research tools, and Salesforce.



5. Operational Process

- Parse:** The agent extracts Name, Company, Role, and Context from the email.
- Enrich (Research):** It searches verified public sources (LinkedIn, Company Website, Bloomberg) to find:

- Industry & Hardware/Software Stack
- Verified Location
- Key Decision Makers

- Validate:** Discrepancies between Email and Research data are flagged.

- Format:** Data is structured into a strict JSON schema compatible with Salesforce.

5. Score & Plan:

- **Quality Rating:** High/Medium/Low based on fit and urgency.
- **Sales Plan:** A step-by-step engagement strategy (e.g., "Focus on their recent Series B funding...").

5. Output Specifications

Salesforce Schema (JSON)

The final output is a JSON object ready for API ingestion:

```
{  
  "FirstName": "John",  
  "LastName": "Doe",  
  "Company": "Acme Corp",  
  "Title": "CTO",  
  "Email": "john.doe@acme.com",  
  "Industry": "Technology",  
  "LeadSource": "Email Inbound",  
  "Description": "Enriched by AI Agent. Quality: High."  
}
```

Lead Summary & Suggestion output

A textual summary provided to the user/sales team:

> **Lead Summary:** John Doe is the CTO of Acme Corp, a Series B tech firm.

> **Quality:** High (Perfect ICP fit).

> **Suggestion:** Reach out regarding their recent cloud migration announcement.

6. Guidelines

| Guideline | Description |

| :--- | :--- |

| **Accuracy First** | Do not hallucinate data. If a field (e.g., Revenue) is not verifiable, leave it blank. |

| **Credibility** | Use only "Verified Public Sources" (Official Sites, verified directories). |

| **Objectivity** | Lead Scoring must be data-driven, not speculative. |

| **Privacy** | Do not expose PII that is not publicly available or voluntarily provided. |

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