

Sam J Shih

Lia Garvin

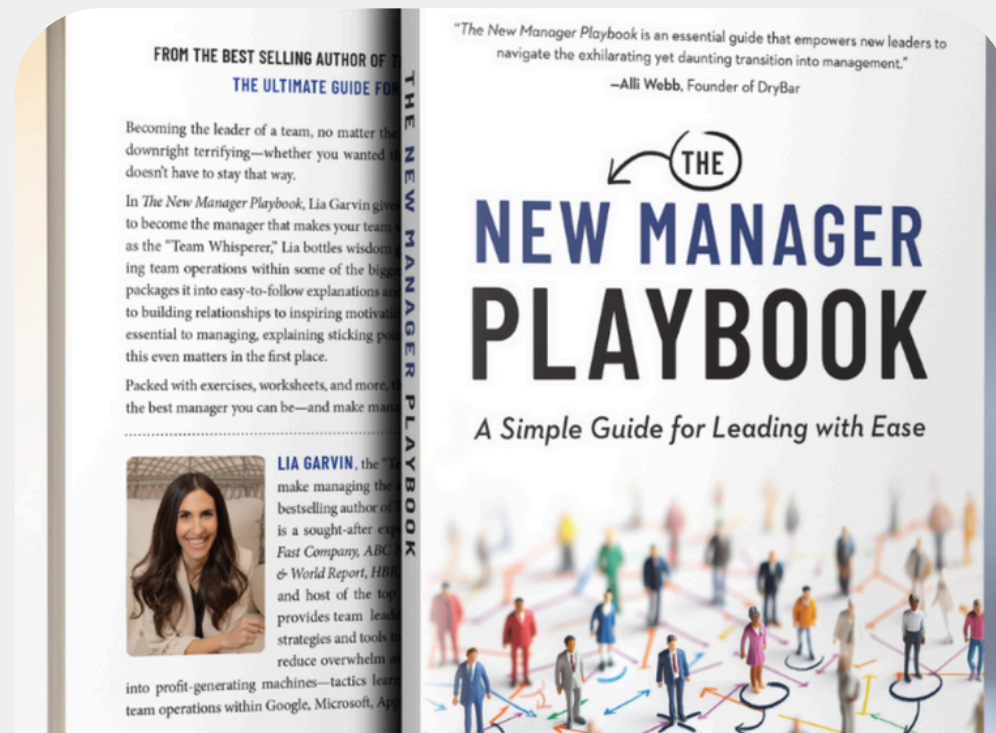
Call Prep

Automation

Automating Client Call Preparation with AI



Who is Lia Garvin?



Author

Bestselling author of The New Manager Playbook, helping leaders navigate team management with clarity and confidence.



TEDx Speaker

Delivers inspiring talks on leadership and workplace culture to audiences worldwide.



Team Management Consultant

Advises Fortune 500s and startups on building high-performing, people-first teams.

Problem



When new clients booked time on her calendar, Lia often had no idea who they were or what company they worked for.

Before each call, she'd:

- Look up the person on LinkedIn
- Google their company and industry
- Skim their website or posts to get context

That 15–20 minute research scramble before every new call added unnecessary stress.

Goal



Lia wanted to show up more prepared and confident for every client call without spending 15–20 minutes digging through LinkedIn, Google, and old emails.

- Automatically researched new clients
- Summarized key background details
- Delivered everything to her before each meeting

Solution



An AI-powered pre-call research assistant.



Calendly

Detects new bookings and kicks off the workflow instantly.



Apollo

Finds verified emails, roles, and company details in seconds.



News Search Agent

Scans the web for the latest company and industry updates.



ChatGBT

Synthesizes background info into a concise client summary.



Airtable

Stores insights and emails the report before every meeting.

Testimonial

“Sam built an AI agent that connects my calendar, email, and industry news so every time a new lead books, I instantly have all the insights I need to walk into the call confident and prepared. It’s helped me connect faster, understand my clients on a deeper level, and feel completely ready for every conversation.”

Lia Garvin – Team Management Consultant & TEDx Speaker



Results & Impact



Time Saved

Prep time cut from 20 minutes to seconds with instant AI-generated insights.

Stronger Connections

Lia starts every call prepared, building trust and rapport right away.

More Confidence

She now enters meetings calm, focused, and fully ready to deliver.

Seamless Workflow

The AI agent runs automatically in the background, supporting her daily routine.

Key Takeaway

This project didn't just save Lia time. It reminded me that great automation always starts with empathy. When you design for people, not just processes, you create tools they can't live without.

That's what I strive for in every build.

Automation that feels human.

