Lessons in Lead Follow-Up: Next-Level Automation Strategies for Connecting Leads with Sales

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Agenda

- The Pain: Lessons Learned in Lead Follow-Up
- The Prescription: Find Your Flow
- Building Blocks: Custom Fields, Automation Rules, Email Templates, Engagement Studio
- Integrations: Keeping Sales Engaged with Engagement
- The Gain: Get More Meetings Booked, More Quickly

The Pain

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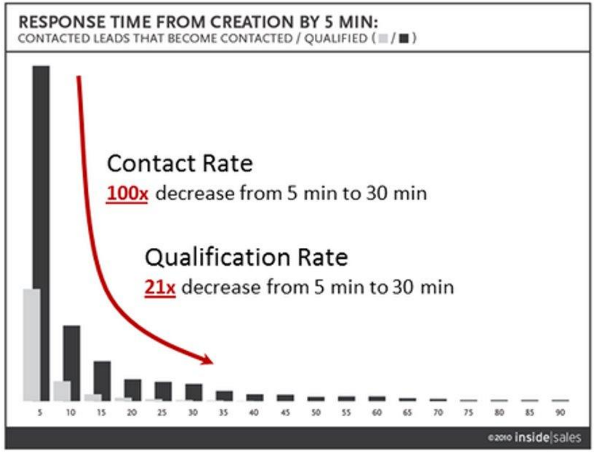
Lead Follow Up: Early and Often

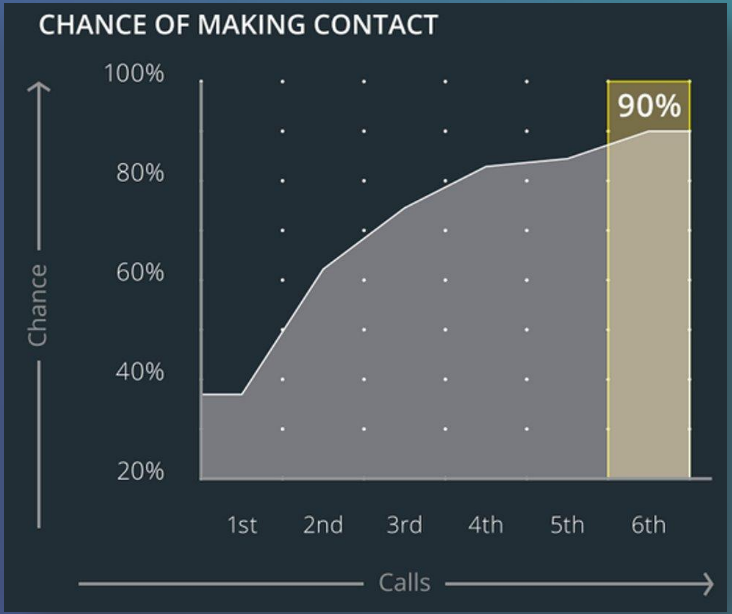
Fast response improves contact rates



Contact rates significantly drop off after 5 minutes

Contacted Leads

Qualified Leads



Lead Follow-Up: Fun Facts

78%

of customers buy from the company that responds to them first

-80%

chance of qualifying a lead after 5 minutes have elapsed

8

number of attempts it can take to reach a prospect

7X

more likely to reach decision-makers if followed up in 1st hour

7%

the number of companies that follow up within 1 hour

44%

of salespeople give up after one follow-up attempt

Lead Lessons Learned

Pass to Sales
- Inconsistent lead follow up speed and frequency
- Sales busy chasing, not selling
- Leads, marketing spend wasted

Pass to BDR
- Another hurdle for prospects
- Another headcount busy not selling

Straight to Calendar
- Need to add too many pre-qual fields
- Sales 'trapped' on bad calls
- Burning sales calories on unqualified leads

The Prescription

Goals

- Faster Follow-Up
- More Contact Attempts
- Email Personalization
- Better Inbox Deliverability
- More Meetings Booked

Requirements

Automate email to remove admin burden on Sales

Make it easy for leads to book into Sales' Calendars

Let Sales focus on selling

Follow up is fast, personalized and optimized to book meetings

Automate calls tasks and reminders for Sales

How it Works

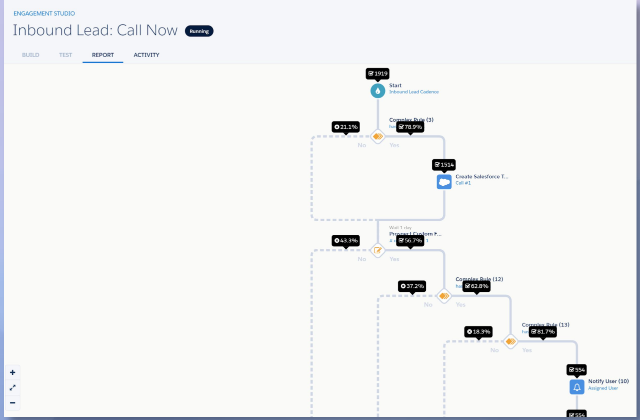
Marketing sends personalized email (Gmail/Outlook) introduction to their “expert” POC

SF Template inserts lead owner info/calendar link

Engagement Studio sends follow-up emails/call tasks

Lead exits program when meeting booked

8 Attempts in 8 Days: 4 emails + 4 Sales calls



Inbound Lead Follow-Up Flow

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Email #1 → **Call #1** → **Email #2** → **Call #2** → **Email #3** → **Call #3** → **Email #4** → **Call #4**

Day 1:
Marketing: Send using Gmail/SF template. Customize. Introduce Lead to 'expert' in Sales. Encourage Calendly booking.

Call Task is assigned to Sales Rep in SF.

Day 1 or 2:
Sales: Make and Log call #1 within 24 hours of lead assignment. Important as Email #2 will reference call attempt.

Sales gets email notification if call window is missed.

Day 3:
Marketing: "Sorry I missed you on the phone" email.

Emails 2-4 "From" Sales rep but sent via Engagement Studio program.

Call Task #2 is assigned to Sales Rep in SF.

Day 4:
Sales: Make and Log call #2

Sales gets email notification if call window is missed.

Day 5:
Marketing: "Still trying to reach you" email.

Call Task #3 is assigned to Sales Rep in SF.

Day 6:
Sales: Make and Log call #3

Sales gets email notification if call window is missed.

Day 7:
"Permission to close your file" email.

Call Task #4 is assigned to Sales Rep in SF.

Day 8:
Sales: Make and Log call #4

Lead removed from flow and Lead Status auto-changed to 'Nurture: 8 Contacts Attempted'

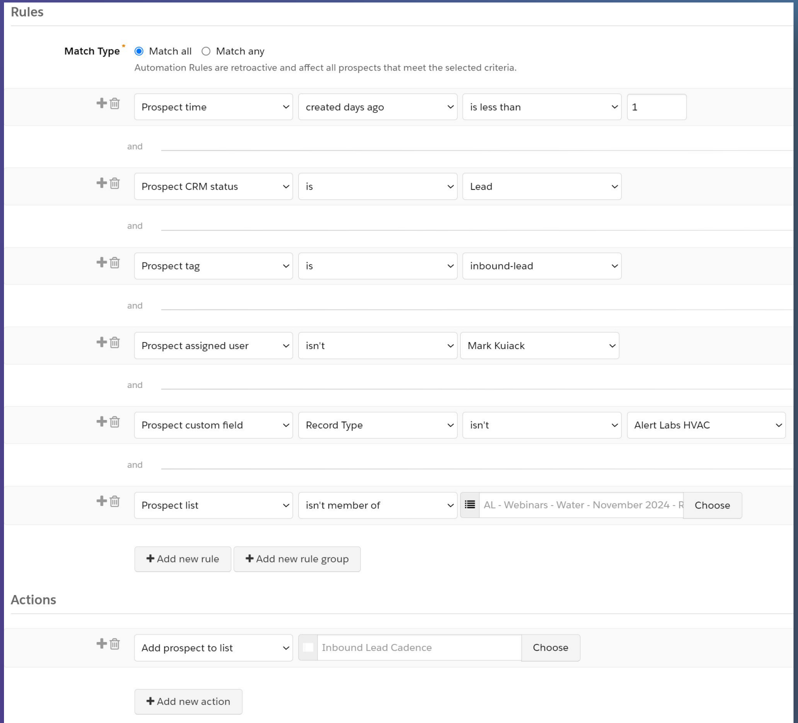
Updated Lead Status removes Lead from flow

Building Blocks

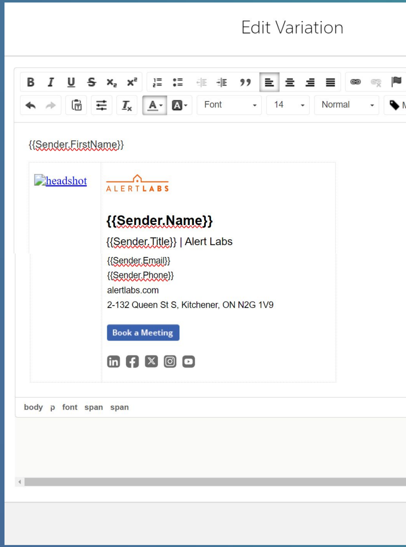
Custom Fields:

- Lead Owner Name
- Lead Owner Calendar link
- Lead Owner headshot
- Lead Owner Slack ID
- Total # of Calls
- Lead Status

Automation Rule:



Dynamic Content:



Email #1

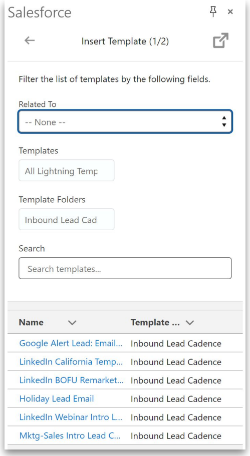
Lead intro to their “expert” POC

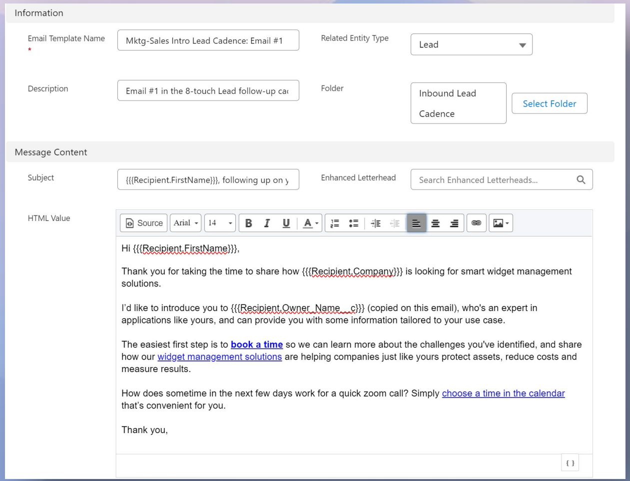
SF template sent via Outlook/Gmail

Increase chances of hitting inbox

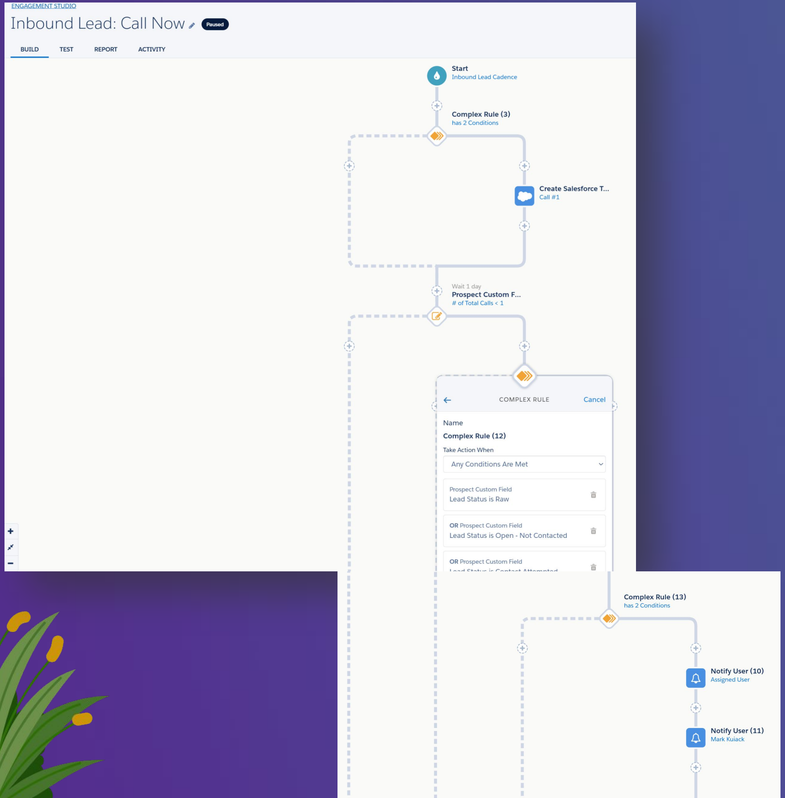
Maximize personalization

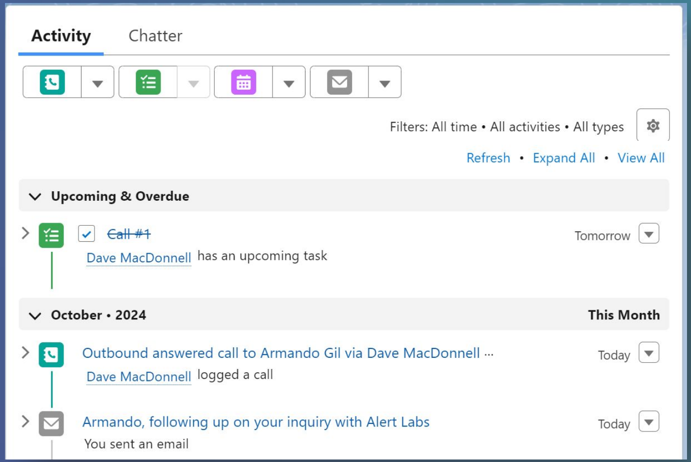
One clear CTA: Book a 15-min Meeting

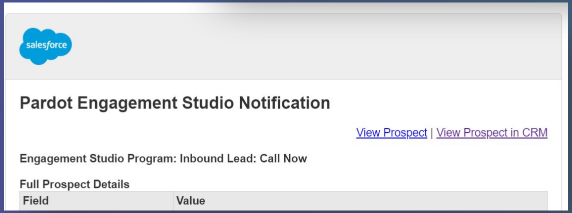


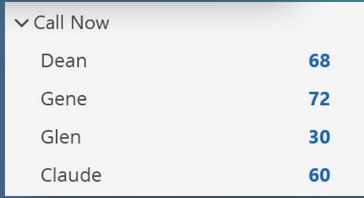


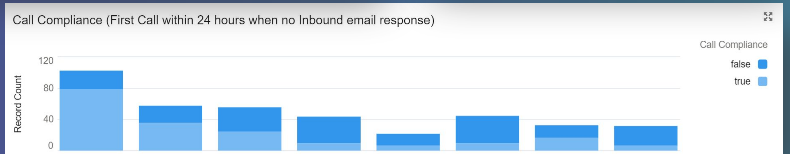
Engagement Studio: Calls



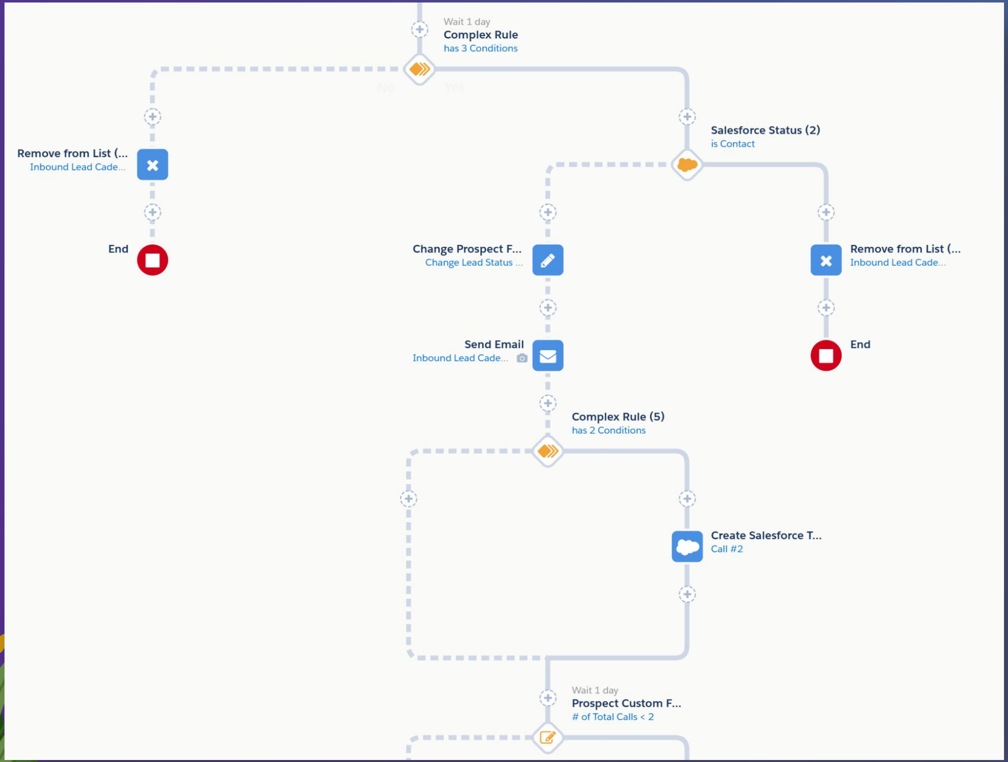








Engagement Studio: Emails #2-4



Email 2: Sorry I missed you…

Sorry I missed you on the phone. I was calling in response to your recent inquiry to Alert Labs, and wanted to see if we could schedule some time to discuss your widget management needs.

I'll try again in the next day or so. You can also book some time with me here.

I look forward to connecting.

Best,

Email 3: Still trying to respond to your inquiry

I'm following up on the email I sent you a couple of days ago, about your recent interest in Alert Labs. I know you're probably busy, but do you have time for a quick call or zoom?

The best way to understand how we can help you better manage your widgets with our advanced widget platform is to discuss your needs directly.

Please pick a spot in my calendar at a time that works for you.

Thank you in advance for your time.

Email 4: Permission to close your file

I'm writing to follow up on my recent emails and voicemails about how {{Recipient.Company}} can benefit from intelligent widget management.

We're in the process of closing files for the month. Typically when I haven't heard back from someone it means they are either really busy or aren't interested anymore. If it's the latter, do I have your permission to close your file?

If you're still interested in managing and measuring your widgets, what do you recommend as the next step?

Thanks in advance for your help. If you'd like to book some time to chat at a later date, please pick a spot in my calendar here.

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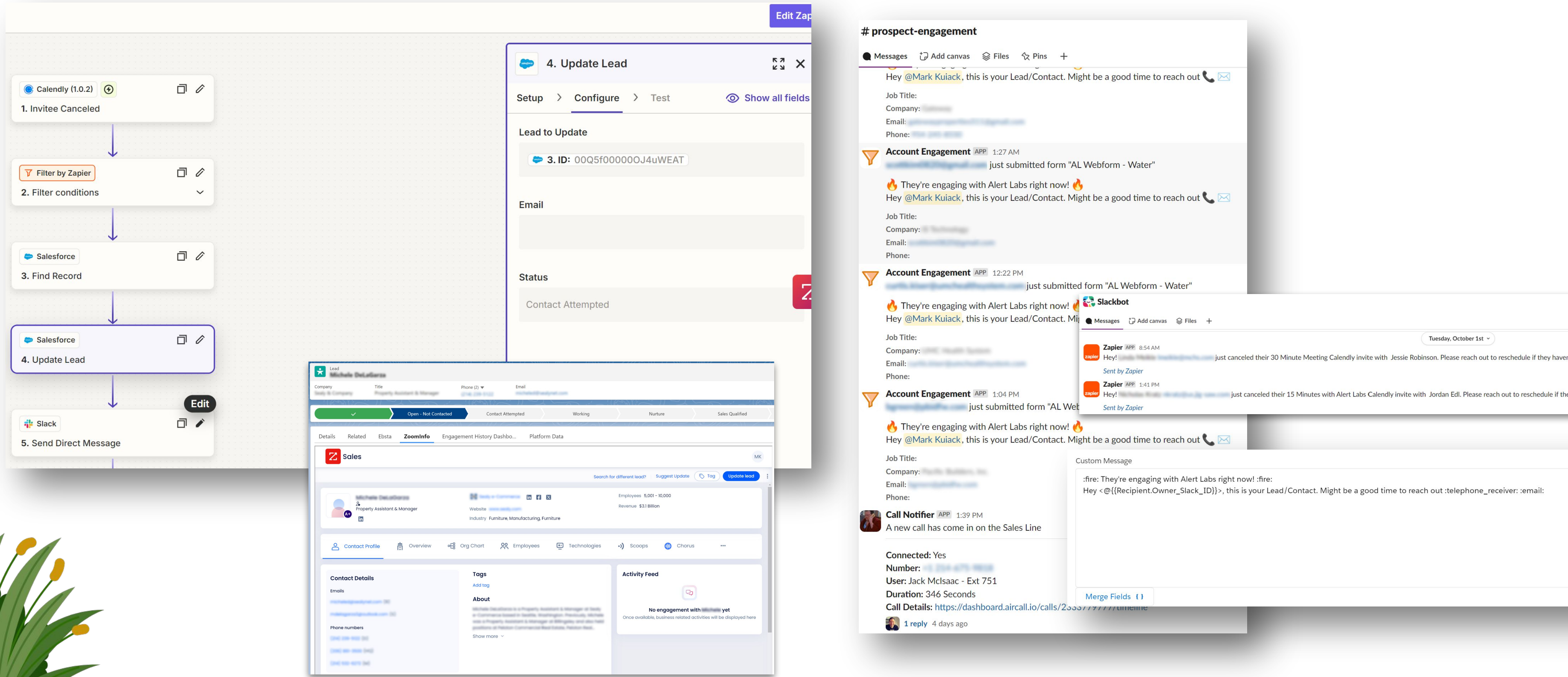
Integrations: Calendly, Slack, Zapier, ZoomInfo



The Gain

Results

Leads book more meetings, faster, while still engaged.

KPI	The Old Way	The New Way
% of MQLs w/ Booked Meetings	42%	**70%**
Avg. Time to Meeting Booked	119 hours	**35.27 hours**
Median Time to Meeting Booked	20.57	**1.87 hours!**
Median Time to Opp Created	11 days	**6 days**

Thank You!

Questions? mark@alertlabs.com