



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

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Alert Labs,  
Marketing Automation Manager

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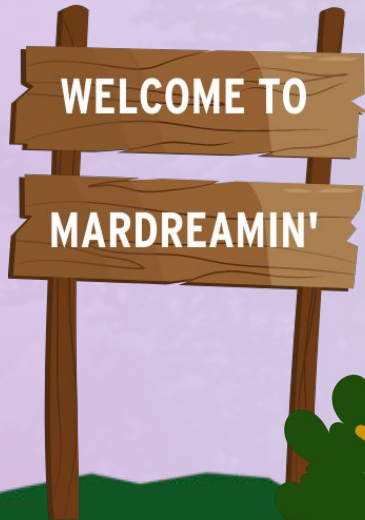
  
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# Agenda



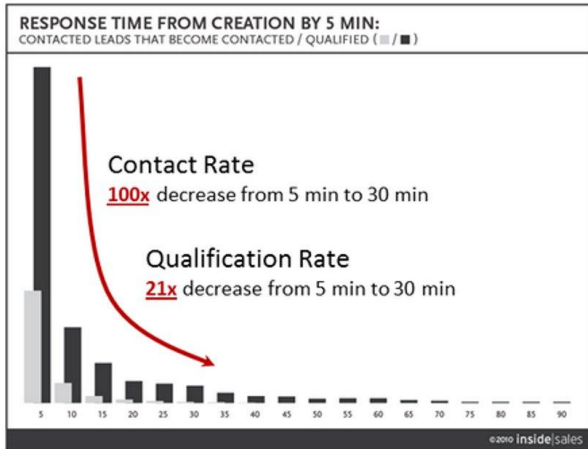
- The Pain: Lessons Learned in Lead Follow-Up
- The Prescription: Find Your Flow
- Building Blocks: Custom Fields, Automation Rules, Email Templates, Engagement Studio
- Integrations: Keeping Sales Engaged with Engagement
- The Gain: Get More Meetings Booked, More Quickly

# The Pain



# Lead Follow Up: Early and Often

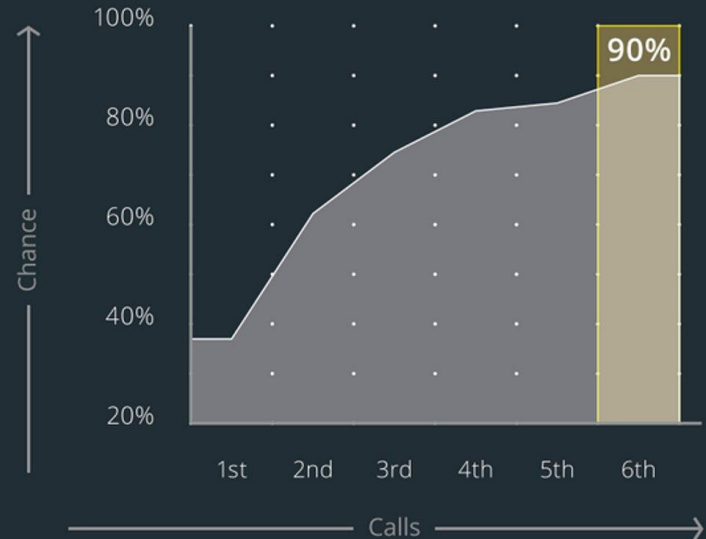
## Fast response improves contact rates



Contact rates significantly drop off after 5 minutes

- Contacted Leads
- Qualified Leads

## CHANCE OF MAKING CONTACT



## 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

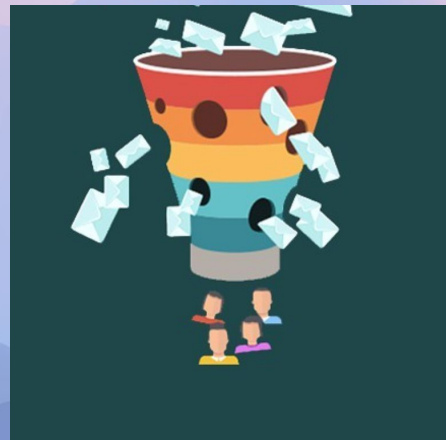
- Inconsistent lead follow up speed and frequency
- Sales busy chasing, not selling
- Leads, marketing spend wasted

## 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

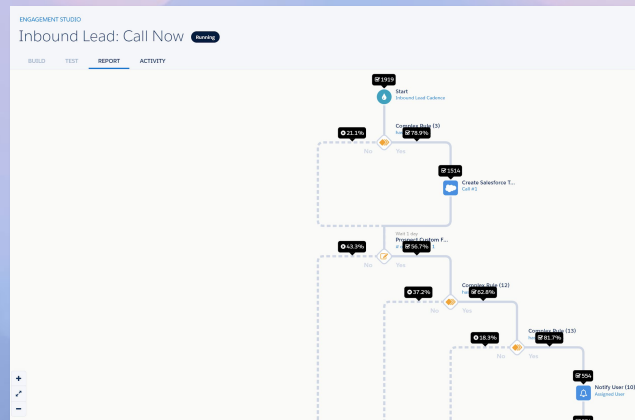
Marketing sends personalized email  
(Gmail/Outlook) introduction to their “expert” POC

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



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:

Rules

Match Type  Match all  Match any  
Automation Rules are retroactive and affect all prospects that meet the selected criteria.

+ Prospect time created days ago is less than 1

and

+ Prospect CRM status is Lead

and

+ Prospect tag is inbound-lead

and

+ Prospect assigned user isn't Mark Kulack

and

+ Prospect custom field Record Type isn't Alert Labs HVAC

and

+ Prospect list isn't member of AL - Webinars - Water - November 2024 - R Choose

+ Add new rule + Add new rule group

Actions

+ Add prospect to list Inbound Lead Cadence Choose

+ Add new action

## Dynamic Content:

Edit Variation

B I U S x x' j: Font 14 Normal

{{Sender.FirstName}}

headshot ALERT LABS

{{Sender.Name}} | Alert Labs  
 {{Sender.Title}} | Alert Labs  
 {{Sender.Email}}  
 {{Sender.Phone}}  
 alertlabs.com  
 2-132 Queen St S, Kitchener, ON N2G 1V9

Book a Meeting

in f x @

body p font span span

# Email #1

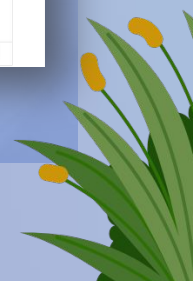
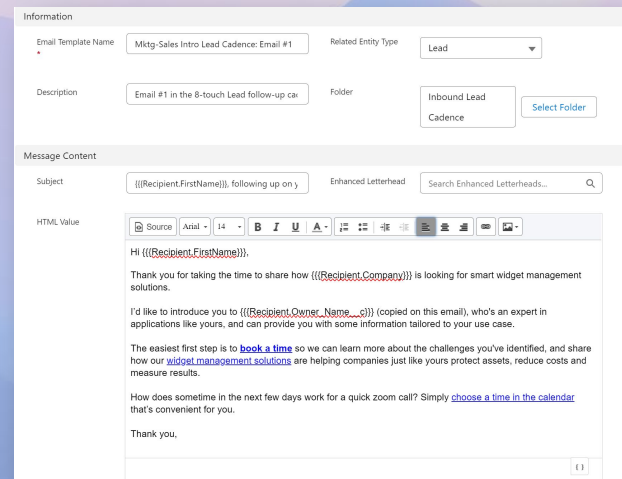
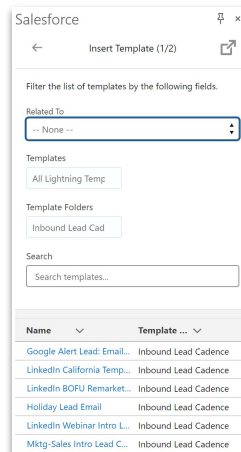
Lead intro to their “expert” POC

SF template sent via Outlook/Gmail

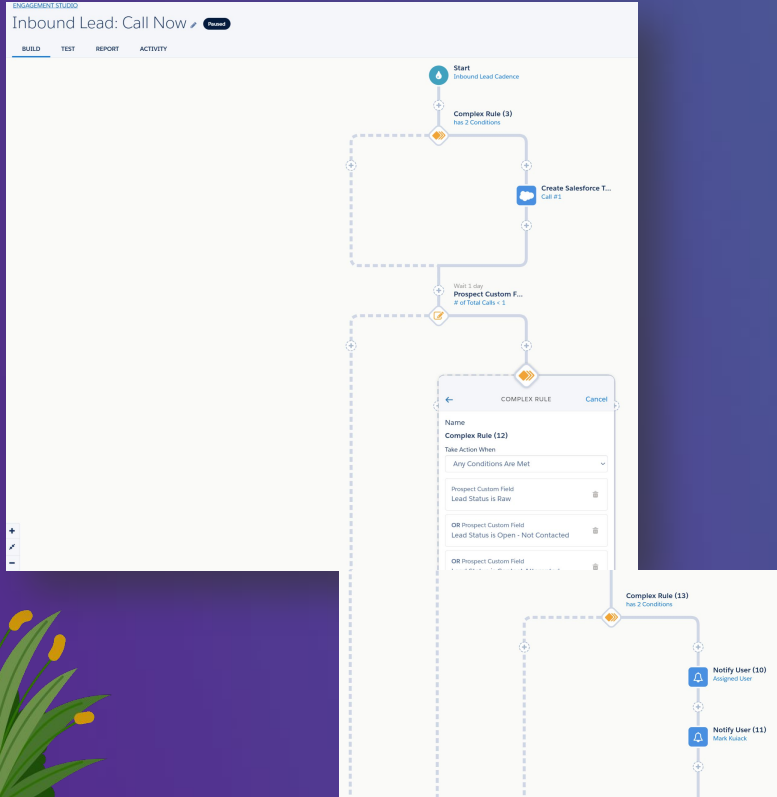
Increase chances of hitting inbox

Maximize personalization

One clear CTA: Book a 15-min Meeting



# Engagement Studio: Calls



**Activity** Chatter

Filters: All time • All activities • All types

Refresh • Expand All • View All

**Upcoming & Overdue**

- Call #1 (Tomorrow)
  - Dave MacDonnell has an upcoming task

**October - 2024** **This Month**

- Outbound answered call to Armando Gil via Dave MacDonnell ... (Today)
  - Dave MacDonnell logged a call
- Armando, following up on your inquiry with Alert Labs (Today)
  - You sent an email

**Salesforce**

**Pardot Engagement Studio Notification**

[View Prospect](#) | [View Prospect in CRM](#)

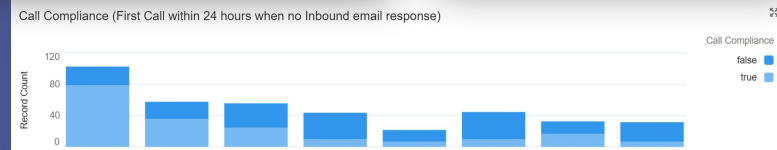
Engagement Studio Program: Inbound Lead: Call Now

Full Prospect Details

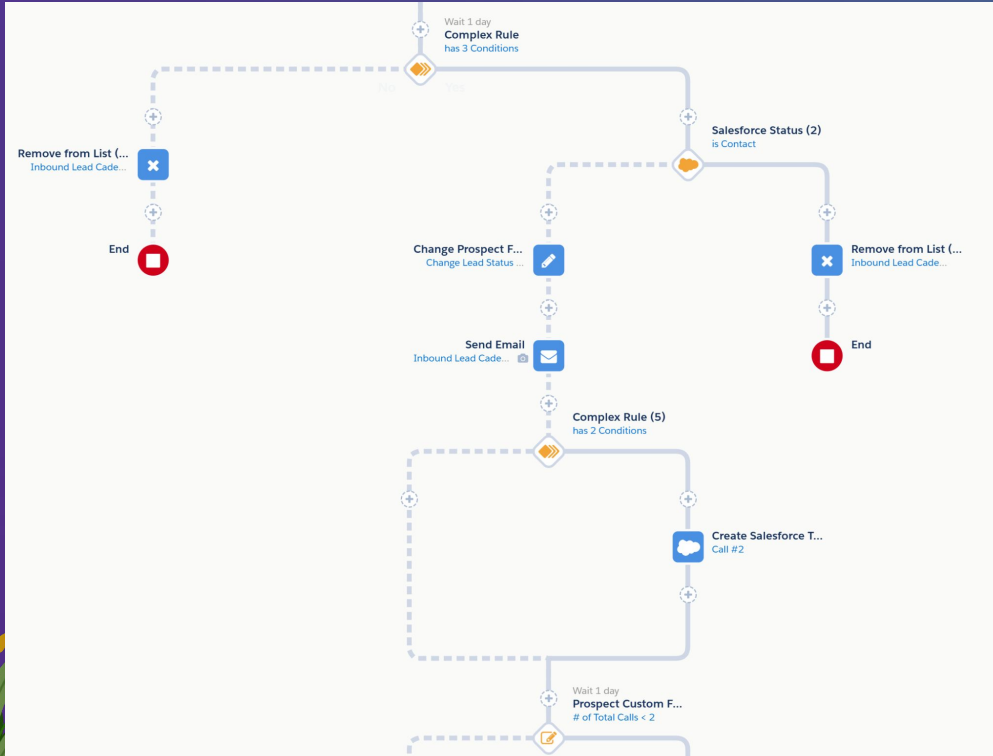
Field	Value

Call Now

Dean	68
Gene	72
Glen	30
Claude	60



# 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.

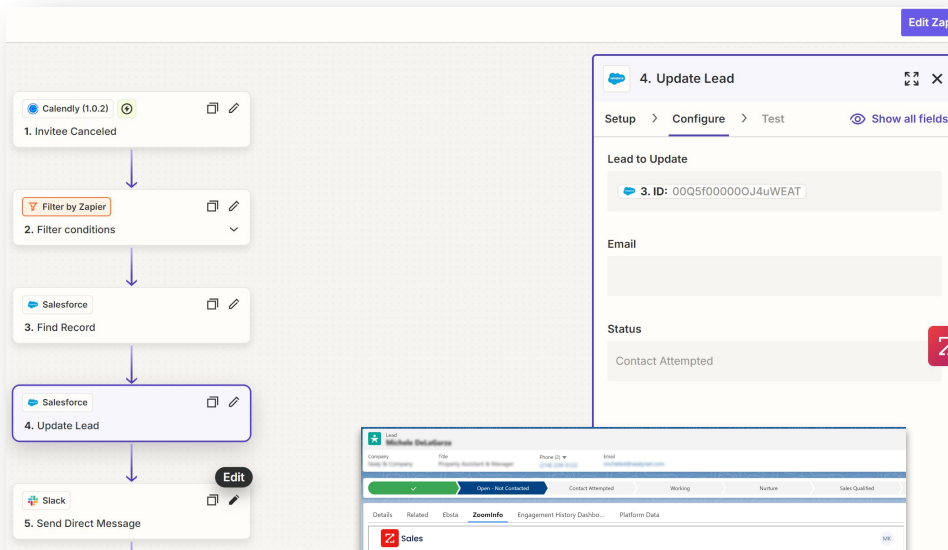
We're in the process of closing files for the month. Typically when I haven't heard back from someone it means they are either really busy or aren't interested anymore. If it's the latter, do I have your permission to close your file?

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](#).



# Integrations: Calendly, Slack, Zapier, ZoomInfo



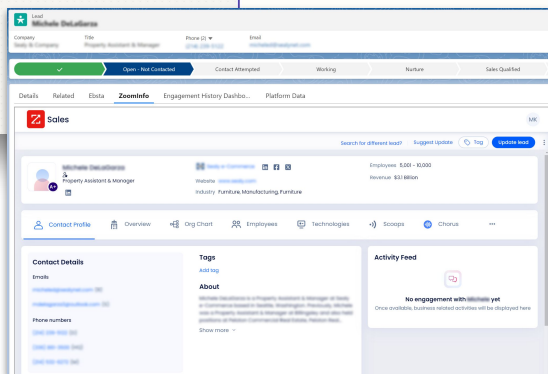
The image shows a Zapier workflow diagram on the left and a configuration screen for the '4. Update Lead' step on the right.

**Workflow Diagram:**

1. Invitee Canceled
2. Filter conditions (Filter by Zapier)
3. Find Record (Salesforce)
4. Update Lead (Salesforce)
5. Send Direct Message (Slack)

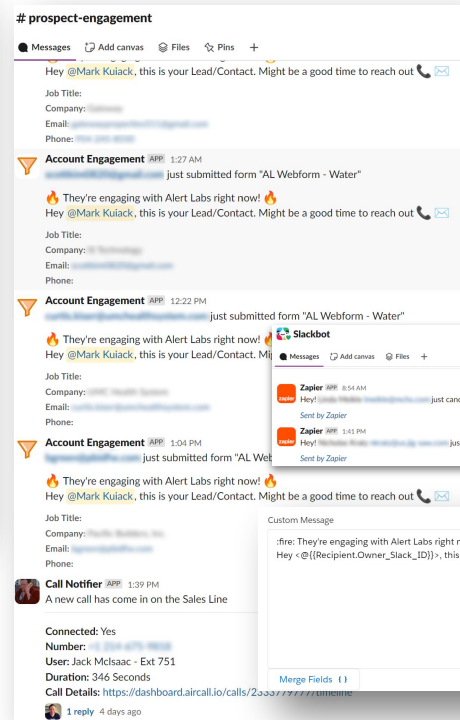
**Configuration Screen (4. Update Lead):**

- Step: 4. Update Lead
- Lead to Update: 3. ID: 00Q5F00000QJ4uWEAT
- Email: [Empty field]
- Status: Contact Attempted



ZoomInfo CRM profile for Michelle DeLafontaine:

- Company:** Microsoft Dynamics
- Title:** Primary Assistant & Manager
- Phone (2):** [Redacted]
- Email:** michelle.delafontaine@microsoft.com
- Work Status:** Working
- Industry:** Furniture, Manufacturing, Furniture
- Employee:** \$201 - \$500
- Revenue:** \$1.8B - \$2.8B
- Tags:** All tag
- Activity Feed:** No engagement with Michelle yet



Slack chat messages in the #prospect-engagement channel:

- Message 1:** Hey @Mark Kulack, this is your Lead/Contact. Might be a good time to reach out. (Job Title, Company, Email, Phone)
- Message 2:** Account Engagement APP: 1:27 AM just submitted form "AL Webform - Water"
- Message 3:** They're engaging with Alert Labs right now! Hey @Mark Kulack, this is your Lead/Contact. Might be a good time to reach out. (Job Title, Company, Email, Phone)
- Message 4:** Account Engagement APP: 12:22 PM just submitted form "AL Webform - Water"
- Message 5:** They're engaging with Alert Labs right now! Hey @Mark Kulack, this is your Lead/Contact. Might be a good time to reach out. (Job Title, Company, Email, Phone)
- Message 6:** Zapier APP: 8:54 AM just canceled their 30 Minute Meeting Calendly invite with Jessie Robinson. Please reach out to reschedule if they have
- Message 7:** Zapier APP: 3:43 PM Hey! just canceled their 15 Minutes with Alert Labs Calendly invite with Jordan Edl. Please reach out to reschedule if the
- Message 8:** Account Engagement APP: 1:04 PM just submitted form "AL Webform - Water"
- Message 9:** They're engaging with Alert Labs right now! Hey @Mark Kulack, this is your Lead/Contact. Might be a good time to reach out. (Job Title, Company, Email, Phone)
- Message 10:** Call Notifier APP: 1:39 PM A new call has come in on the Sales Line

**Custom Message:**

```
.fire: They're engaging with Alert Labs right now!.fire: Hey <@{{Recipient.Owner_Slack_ID}}>, this is your Lead/Contact. Might be a good time to reach out.telephone_receiver: email:
```

# The Gain



# Results

Leads book more meetings, faster, while still engaged.

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

# Thank You!

Questions? [mark@alertlabs.com](mailto:mark@alertlabs.com)

