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CRM Follow-Up Automation Template

A ready-to-adapt 7-touch sequence for following up with new leads automatically — so no lead goes cold waiting on someone to remember to reach out.

A free template from The Nexa Solutions · thanexasolutions.com

How to Use This Template

This is a 21-day, 7-touch follow-up sequence for a new inbound lead — the gap between “someone showed interest” and “we’re in an active conversation” that most CRMs (HubSpot, Pipedrive, Salesforce, or a simple spreadsheet) can automate with workflow rules or a connected automation tool.

The specific wording, timing, and channels here are a starting point — adapt them to your sales cycle, average deal size, and how your leads actually behave. The structure (multiple channels, an increasing gap between touches, a clear exit point) is what matters most.

Before you automate this

This sequence assumes every touch stops immediately once the lead replies — nothing here should keep emailing someone who’s already responded. In your CRM or automation tool, this is usually a simple “if replied, exit sequence” rule applied across every step.

Lead Stages This Sequence Moves Through

New	Lead has just come in; sequence hasn't started yet.
Contacted	At least one touch has gone out; awaiting a response.
Engaged	Lead has replied, opened multiple emails, or booked a call — remove from the automated sequence.
Qualified	A human has confirmed fit and budget; moves to active sales conversation.
Closed – No Response	Sequence completed with no reply; moved to a long-term nurture list instead of being deleted.

The Sequence at a Glance

0	Email	Confirm receipt, set expectations
1	Phone Call	Personal, direct first contact
3	Email	Add value — not just “checking in”
6	Email	Social proof — relevant case study or result
9	Phone Call	Second direct attempt
14	Email	Address a likely objection directly
21	Email	Final, low-pressure breakup message

DAY 0

Confirmation & Expectation-Setting

Sent the moment a lead comes in — confirms it was received and sets a real expectation for next steps.

1	SUBJECT LINE	Thanks for reaching out, {{first_name}} — here's what happens next
2	KEY MESSAGE	Confirm the inquiry was received, name a specific timeframe for a human response, and set a light expectation (“a specialist will call you within one business day”).
3	CALL TO ACTION	Optional: a scheduling link, so an engaged lead can skip ahead and book a call themselves.
4	IF NO REPLY	No action needed — this touch's job is expectation-setting, not a response.

Channel: Email (automated)

Customize it: Automate this one fully — it should fire within minutes, every time, with zero exceptions.

DAY 1

Personal First Contact

A real call attempt — the highest-converting touch in the sequence, and the one most likely to be skipped without a system.

1	TALKING POINTS	Reference the specific thing they inquired about, ask one open question about their situation, and offer a concrete next step.
2	IF ANSWERED	Move the lead to Engaged and pause the automated sequence — the conversation continues manually from here.
3	IF NO ANSWER	Leave a short, specific voicemail (not “just checking in”) and let the sequence continue automatically.

Channel: Phone call (human)

Customize it: Log every call attempt in the CRM immediately — a skipped or unlogged call attempt is the most common way this sequence quietly breaks.

DAY 3

Add Value, Not Just “Checking In”

A useful, specific piece of content related to their inquiry — never a bare “just following up” email.

1	SUBJECT LINE	A quick resource on {{topic_they_asked_about}}
2	KEY MESSAGE	Share one genuinely useful resource, insight, or answer related to what they originally asked about — give something before asking again.
3	CALL TO ACTION	A single, low-friction next step (reply, or a scheduling link).
4	IF NO REPLY	Continue to Day 6.

Channel: Email (automated)

Customize it: Swap in a resource specific to their stated interest (from the contact form’s “service interested in” field) rather than a generic attachment.

DAY 6

Social Proof

A relevant result or case study from a similar customer — proof, not persuasion.

1	SUBJECT LINE	How {{similar_company}} solved a similar problem
2	KEY MESSAGE	One short, specific example of a similar customer’s result — a number or outcome, not a generic testimonial quote.
3	CALL TO ACTION	Ask directly: “Is this still something you’re exploring?”
4	IF NO REPLY	Continue to Day 9.

Channel: Email (automated)

Customize it: Match the case study to their industry or company size when you have more than one to choose from — relevance matters more than the strength of the result.

DAY 9

Second Direct Attempt

A second real call attempt — many leads that don't answer the first call do answer the second.

1	TALKING POINTS	Reference the content sent on Day 3 and 6 — “I sent over a couple of resources, wanted to see if you had a chance to look”.
2	IF ANSWERED	Move to Engaged, pause the sequence.
3	IF NO ANSWER	Leave a voicemail, let the sequence continue.

Channel: Phone call (human)

Customize it: If this is a lower-value lead (small deal size), this touch is the most common one to skip or replace with a text message instead.

DAY 14

Address the Likely Objection

Directly names the most common reason similar leads hesitate — pricing, timing, or complexity.

1	SUBJECT LINE	A quick note in case timing/budget is the hesitation
2	KEY MESSAGE	Name the most likely objection directly and address it briefly — this is more effective than another generic check-in.
3	CALL TO ACTION	A specific, easy yes/no question: “Is budget the main blocker right now?”
4	IF NO REPLY	Continue to Day 21.

Channel: Email (automated)

Customize it: Use your actual close-lost reasons from the CRM to pick the objection — don't guess.

DAY 21

The Breakup Email

A low-pressure final message — closes the loop honestly instead of trailing off into silence.

1	SUBJECT LINE	Should I close your file?
2	KEY MESSAGE	Acknowledge the lack of response without guilt-tripping, and explain you'll stop reaching out unless they say otherwise.
3	CALL TO ACTION	A single reply ("yes, still interested" re-opens the conversation instantly).
4	IF NO REPLY	Move to Closed – No Response and add to a long-term, low-frequency nurture list — don't delete the lead.

Channel: Email (automated)

Customize it: This email consistently gets some of the highest reply rates in the whole sequence — people respond to honesty more than persistence.

Branching Rules Summary

- **Any reply, at any point** — immediately remove the lead from the automated sequence and move to Engaged.
- **Meeting booked, at any point** — remove from the sequence and move to Qualified once the meeting happens.
- **Unsubscribe or "not interested"** — remove immediately and suppress future sequences for that contact.
- **Bounced email** — pause the sequence and flag for manual review rather than continuing to a dead address.

Customizing for Your Sales Cycle

- **Shorter sales cycle / lower deal size:** compress the whole sequence into 7–10 days and drop one of the two phone-call touches.
- **Longer sales cycle / higher deal size:** stretch the final touches further apart (Day 30, Day 45) and add a second case-study email before the breakup message.
- **High lead volume:** reserve the phone-call touches for leads above a certain deal-size or fit threshold; let lower-value leads run on email only.

How The Nexa Solutions can help

We build this exact kind of sequence directly into your CRM or connect it through an automation platform, including the branching logic and AI-drafted personalization where it adds value. Visit thanexasolutions.com/contact to book a free consultation.