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Sales Follow-Up Automation Playbook

How to make sure no lead goes more than a few minutes without a response — in four phases, from instant acknowledgment to full multi-touch nurture.

A free playbook from The Nexa Solutions · thanexasolutions.com

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SECTION 1

Why Speed-to-Lead Matters This Much

Response time is one of the few sales variables with a well-documented, dramatic effect on outcomes: contact and qualification rates drop sharply once a lead waits more than a few minutes, and continue dropping the longer they wait. A great sales process built on top of a slow first response is still a slow sales process.

This playbook isn't about replacing salespeople with bots — it's about removing the gap between “a lead showed interest” and “a human engaged with them,” so your team's actual selling skill isn't wasted on leads that went cold waiting.

A useful target

A mature setup acknowledges every lead within seconds, gets a real human response within minutes during business hours, and runs a defined, automatic follow-up sequence for every lead that doesn't convert on first contact — so nothing depends on someone remembering.

SECTION 2

Before You Start: Prerequisites

- **A CRM or lead tracking system already in use** — even a well-maintained spreadsheet works for Phase 1–2, though a real CRM is needed by Phase 3–4.
- **A clear definition of who owns which leads** — by territory, product line, or round-robin — so routing has a rule to follow.
- **At least a rough sense of your current average response time**, so you have a baseline to improve on.
- **A named owner** for this project who reviews lead response performance regularly.

If leads currently land in a shared inbox with no routing rule

Start there. Automating speed on top of an undefined ownership structure just means everyone gets notified instantly and no one still takes responsibility.

PHASE 1

Instant Acknowledgment

The lead receives an immediate confirmation the moment they submit an inquiry — before any human has done anything.

1	CAPTURE	Connect your website form, landing pages, and any other lead source directly to your CRM or automation tool.
2	ACKNOWLEDGE	Trigger an immediate automated email confirming receipt and setting a specific expectation (e.g. “a specialist will call within one business hour”).
3	LOG	Automatically create the lead record in your CRM the moment the form is submitted — no manual entry.
4	VERIFY	Test the full path with a real submission weekly to confirm nothing has silently broken.

Goal before moving to the next phase: Every new lead receives an acknowledgment within seconds of submitting, with zero exceptions.

PHASE 2

Speed-to-Lead Routing & Alerting

The right salesperson is notified instantly through a channel they actually check — not left to discover the lead by checking a dashboard.

1	ROUTE	Apply your ownership rule (territory, product, round-robin) to automatically assign each new lead.
2	ALERT	Send an instant notification to the assigned rep via Slack, SMS, or a push notification — not just an email.
3	ESCALATE	If the lead isn't claimed or contacted within a set window (e.g. 15 minutes), automatically alert a manager or reassign it.
4	CONFIRM	Log the time-to-first-contact for every lead automatically, so response time is measured, not assumed.

Goal before moving to the next phase: Median time from lead submission to a rep viewing/claiming the lead is under 5 minutes during business hours.

PHASE 3

AI-Qualified, Personalized Follow-Up

AI assists reps by pre-qualifying leads and drafting a genuinely personalized first outreach, so reps spend their time selling, not writing from scratch.

1	ENRICH	Automatically pull additional context on the lead (company size, industry, form responses) before the rep's first contact.
2	SCORE	Apply a simple AI or rules-based qualification score so reps can prioritize the highest-fit leads first.
3	DRAFT	Have AI draft a personalized first outreach email referencing the lead's specific inquiry, for the rep to review and send.
4	REVIEW	Keep every AI draft in a rep's outbox for review, not auto-sent, until the team trusts the tone and accuracy.

Goal before moving to the next phase: Reps report AI-drafted outreach saves meaningful time and requires only light editing before sending.

PHASE 4

Full Multi-Touch Nurture Automation

Every lead that doesn't convert on first contact automatically enters a structured, multi-touch follow-up sequence — so no lead is only followed up with once.

1	SEQUENCE	Enroll non-responsive leads into a structured multi-touch sequence (see our CRM Follow-Up Automation Template for a ready-to-use 7-touch structure).
2	BRANCH	Automatically exit the sequence the moment a lead replies, books a meeting, or explicitly opts out.
3	REACTIVATE	Route leads that don't convert after the full sequence into a longer-term, low-frequency nurture list instead of deleting them.
4	REPORT	Automatically surface sequence performance (response rate, conversion rate) to the sales lead weekly.

Goal before moving to the next phase: Every non-converted lead is in an active, defined follow-up sequence — none rely on a rep remembering to follow up manually.

SECTION 7

Roles & Responsibilities

Project Owner	Owns the rollout end-to-end, decides when to advance to the next phase, reviews response-time metrics weekly.
Sales Manager	Defines routing and ownership rules; monitors rep responsiveness to alerts.
Sales Reps	Respond promptly to alerts; review and personalize AI-drafted outreach in Phase 3.
Technical Owner (internal or external)	Builds and maintains the routing, alerting, and sequence automations.
Leadership / Sponsor	Reviews the metrics in Section 9 monthly and approves any expansion of scope.

SECTION 8

Recommended Tooling Stack

- **CRM** (HubSpot, Pipedrive, Salesforce, or similar) — most support native routing and sequence automation covering Phases 1–2 and Phase 4 without custom development.
- **Alerting channel** (Slack, SMS via Twilio, or your CRM's mobile push notifications) — for Phase 2's instant rep notifications.
- **AI model provider** (OpenAI, Anthropic, or your CRM's built-in AI features) — for lead scoring and personalized draft outreach in Phase 3.
- **Automation layer** (n8n, Zapier, Make, or native CRM workflows) — to connect your website, CRM, and alerting channel together.

Start with what you already have

Most modern CRMs already include workflow automation covering Phases 1, 2, and 4 — check your existing plan's features before building anything custom.

SECTION 9

Metrics to Track at Each Phase

Phase 1	% of leads receiving an acknowledgment within 1 minute
Phase 2	Median time from lead submission to first human contact
Phase 3	Rep time saved on drafting; outreach reply rate
Phase 4	% of non-converted leads actively in a follow-up sequence; sequence conversion rate
All phases	Lead-to-opportunity conversion rate; overall pipeline velocity

Common Pitfalls

X Instant acknowledgment without a real fast follow-up behind it

An automated “we’ll be in touch soon” that’s followed by two days of silence is worse than no automation at all — it sets an expectation the process then breaks.

X Alerting every rep for every lead

Notification fatigue makes reps start ignoring alerts entirely — route to a specific owner, not a broadcast to the whole team.

X Auto-sending AI outreach without review, too early

Personalization mistakes in an unreviewed first outreach message damage trust before a conversation even starts.

X No clear exit condition from the nurture sequence

A lead who’s already replied or bought still receiving automated follow-up emails is a common, avoidable embarrassment.

X Measuring activity instead of outcomes

A fast response time that doesn’t improve conversion rate over time means something in the follow-up content, not the speed, needs attention.

SECTION 11

A Realistic 90-Day Timeline

1–2	Prerequisites: define ownership rules, confirm baseline response time, assign an owner.
3–4	Phase 1: launch instant acknowledgment for all lead sources.
5–6	Phase 2: build routing rules and instant rep alerting.
7–10	Phase 3: introduce AI-drafted, personalized first outreach for reps to review.
11–12+	Phase 4: launch the full multi-touch nurture sequence for non-converted leads.

How The Nexa Solutions can help

We design and build exactly this kind of phased sales response automation — including CRM routing, AI-assisted outreach, and multi-touch nurture sequences. Visit thanexasolutions.com/contact to book a free consultation.