1. Agenda

- **Overview**
  A quick walk through of Automations

- **Benefits**
  Why & How can automations help your business

- **Use cases**
  Examples of how we’ve implemented solutions across verticals

- **What’s new**
  Extending its functionality every day - every way!
Delivering smarter Personalization
Leads to better open rate for your campaigns overall & drive customers through sales cycles

Creating a single view of your customer

Automate Lead Qualification & Assignment
Improving your efficiency and overall productivity

78% of successful marketers say that marketing automation is most responsible for improving revenue contribution

Automation Users also have a +9.3% higher Sales Quota Achievement Rate

Automation Users have a 53% higher conversion rate from marketing response to qualified marketing leads
TYPES OF AUTOMATIONS

Lead Acquisition Automations
Lead Nurturing Automations
Prospect – Opportunity Automations
Retention Automations
Upsell – Cross Sell Automations
HOW TO ENGAGE & NURTURE LEADS TO PUSH THEM FASTER DOWN THE SALES FUNNEL

Add triggers to start your workflow
These events mark the entry of a lead into a drip campaign.
SIMPLE (GENERIC) EXAMPLE OF AN AUTOMATED WORKFLOW

Lead Created
New lead created

Send Email
Send welcome email

Wait
For one day

If Email Open/Click

Yes
Update lead
Change lead stage to warm

No
Send Email
Resend email with different subject
Triggers
- Date Based
- Task triggers
- Trigger on Email Campaigns
- Filtering out Leads & Activities

Conditions
- Control day & time
- Wait until Activity
- Context to triggered activity & tasks

Actions
- Add & Update Activity
- Lead Distribution
- LAPPS
- Custom Actions
- Saved Responses
- Send to Sub-Automation
Trigger Automations on Birthdays, Renewal Dates etc

Your Automation starts here

On a Specific Date

Event1

Update Lead

Update Lead Field(s): CRM...

UpdateLead2

If/Else

Location contains data, Vendor...

YES

Send to Sub-Auto...

Alert Case - Push to Respective ...

SubAuto4
Schedule your actions using the ‘Wait’

Set Wait Condition

Lead waits
- For 0 Days
- Specify exact time and day(s)
  - Set days: Monday, Tuesday, Wednesday, Thursday, Friday
  - Set time: 11:00 AM
- Till a specific date & time

Note: The action that follows will be carried out at 11:00 AM on Weekdays (As per your account’s timezone)
Carrying out appropriate actions
On the Status change of a Phone
Distribution Rules through Automations (IndiaNivesh)
Lapps to segregate leads based on Custom logic
Saved Responses from Lapps & Webhooks to reuse in Emails
## Insights from the Automation Email Report

### Automation Report - Email Actions

**Sending Auto responders - Demo Submission LPs [v3]**

Last Published By Dhiya B on 28 Jun 2018 08:32 PM

<table>
<thead>
<tr>
<th>Published</th>
<th>Email Action(s)</th>
<th>18/18 EMAILS DELIVERED</th>
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<tr>
<td></td>
<td>18 TOTAL EMAIL(S) SENT</td>
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</tr>
<tr>
<td></td>
<td>18 TOTAL EMAILS DELIVERED</td>
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**Email Performance - All Email Actions**

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<tr>
<th>Email Name</th>
<th>Subject</th>
<th>Leads Entered</th>
<th>Delivered</th>
<th>Opens</th>
<th>Clicks</th>
<th>Bounces</th>
<th>Unsubscribed</th>
<th>Reported Spam</th>
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<td>117</td>
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<td>8.55%</td>
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</tr>
<tr>
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<td>12</td>
<td>33.33%</td>
<td>25.00%</td>
<td>11.11%</td>
<td>0%</td>
<td>0%</td>
</tr>
</tbody>
</table>
User Automations - Automate start & ends of a user's work day

End of a Work Day
15 minute(s) before the end of the day

If/Else
- If user matches the configured...
Industry Specific

→ Education
→ Insurance
→ Loan Businesses
→ Real Estate
→ Hospitality
→ Travel
→ Healthcare
→ Business Partners
FOR INSURANCE BUSINESSES - MANAGE YOUR COMPLETE POLICY SALES LIFECYCLE

Viewed quote
- Yes
  - Lead stage changed to opportunity
    - lead shares the KYC documents
- No
  - Wait for 3 days
    - Send discounted quote
  - Lead stage changed Documents received
    - when the documents are verified
      - Lead stage changed Verification completed

FOR LOAN BUSINESSES - PUSH LEADS DOWN THE FUNNEL TILL THE LOAN IS APPROVED

Meets eligibility criteria
- Yes
  - Lead stage changed to Eligible
    - Lead shares the KYC documents
    - Lead stage changed to Documents received
      - when the documents are verified
      - Lead stage changed to Verification completed
- No
  - Lead stage changed to Not Eligible
    - Added to nurturing list
FOR REAL ESTATE BUSINESSES - SEND RELEVANT MESSAGES TO LEADS BASED ON INQUIRIES, PREFERENCES & POSITION IN THE BUYING CYCLE
For hospitality businesses - segment your leads based on their vacation preferences, locations, etc.

1. Lead enters their requirements

2. Leadsquared segments leads
   - Property Location, Budget, Preferences

3. If/Else
   - Vacancy Available

4. If Yes:
   - Send Room Options + Book Now CTA

5. If No:
   - Send Room Alternates + Book Now CTA
FOR TRAVEL BUSINESSES - AUTOMATE ALL MARKETING COMMUNICATIONS, BOOKING NOTIFICATIONS, ETC.

Summary

- Unique Leads Entered: 46
- Exit Actions Completed: 36

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FOR HEALTHCARE BUSINESSES - AUTOMATE PATIENT MANAGEMENT TASKS TO AVOID ERRORS AND INCONSISTENCIES

1. New patient inquiry
2. Lead stage changed to prospect
   - Books appointment
3. Lead stage changed to new patient
   - Appointment Concluded
4. Lead stage changed to "Confirmed Patient"
FOR BUSINESS PARTNERS - CREATE PATHS TO CONVERT & ENGAGE LEADS WITH PERSONALIZED MESSAGES
What's new?

Compare fields & Split test emails!

(Straight through the automation)

Tip: To know more about how to Split Test: https://help.leadsquared.com/lead-automation-conditions-split-test/
Thank you!

We’ll see you next session.

Tip
To access more webinars log on to: https://help.leadsquared.com/webinars/