GUIDE

Sales Automation to Scale Your Sales Team

(and Close More Deals)

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TABLE OF CONTENTS

Keeping track of your leads and sales pipeline manually can be tricky and time-consuming — especially when you're working to scale your sales team. Sales automation takes lead prioritization and contact management off your plate, so you can spend your time doing what you do best: closing deals. But... what exactly can you automate?

Using sales automation with your customer relationship management (CRM) system can help you:

- ✓ Keep your team on the same page so nothing slips through the cracks
- ✓ Avoid hours of manual data entry
- ✓ Shorten your sales cycle so you can sell more in less time
- ✓ Stops tasks from piling up for your sales reps (A Nucleus Research study found that marketing automation software increased sales productivity by 14.5%)
- ✓ Know which leads to prioritize — and which need to warm up with an automated nurture campaign
- ✓ Close more deals (4 in 5 users increased their leads using marketing automation software, and 70% saw an increase in conversions)

In this guide, we'll cover 5 parts of your sales process that you can automate — plus 21 automation recipes you can import and use right away.

1. **Track and manage all of your contacts in one place**
2. **Find your most qualified leads with lead scoring**
3. **Create and update deals automatically**
4. **Nurture leads throughout the sales funnel**
5. **Assign tasks and leads to your sales team**

1 Track and manage all of your contacts in one place

When you can see your whole sales process at a glance, your sales team is always on the same page. Automation lets you track every interaction and pick up where your teammates left off. A sales automation CRM keeps your entire sales process moving smoothly.

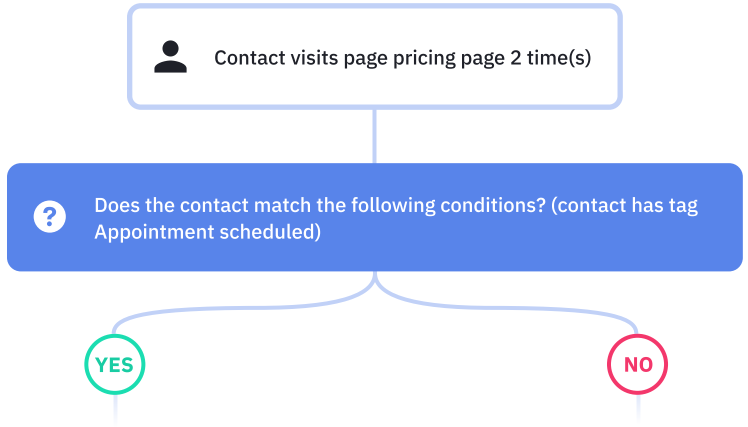
Process automation also means that your sales processes will unfold the same way every time. No rogue sales reps, no missed steps, no customer service issues falling through the cracks.

If you automate your CRM, you can see exactly where your contacts:

- Engage with your marketing campaigns
- Connect in the sales cycle
- Show interest in certain products or services
- Convert into customers
- Need support and additional service

How to respond to (and act on) customer feedback

Segmentation (grouping contacts based on what they have in common) is one of the key ingredients in marketing and sales automation.



Automatically send a meeting request email to begin a sales conversation with contacts who repeatedly visit your pricing page. Get the [Engage Prospects Interested In Pricing Automation Recipe here](#).

When you segment your leads, you can learn more about what they want from your business — then highlight and promote exactly what they want to see. Segmentation lets you provide a more personalized sales experience, even when you use automation to reach out to new leads.

You can segment your leads based on almost anything you can imagine, including:

- Visits to your website
- Contact with your sales team
- Information in custom fields
- Industry
- Job function
- Organization type
- Date subscribed
- Geographic location
- Content viewed
- Products purchased
- Time since last purchase

You can segment your contacts with lists, tags, and custom fields.

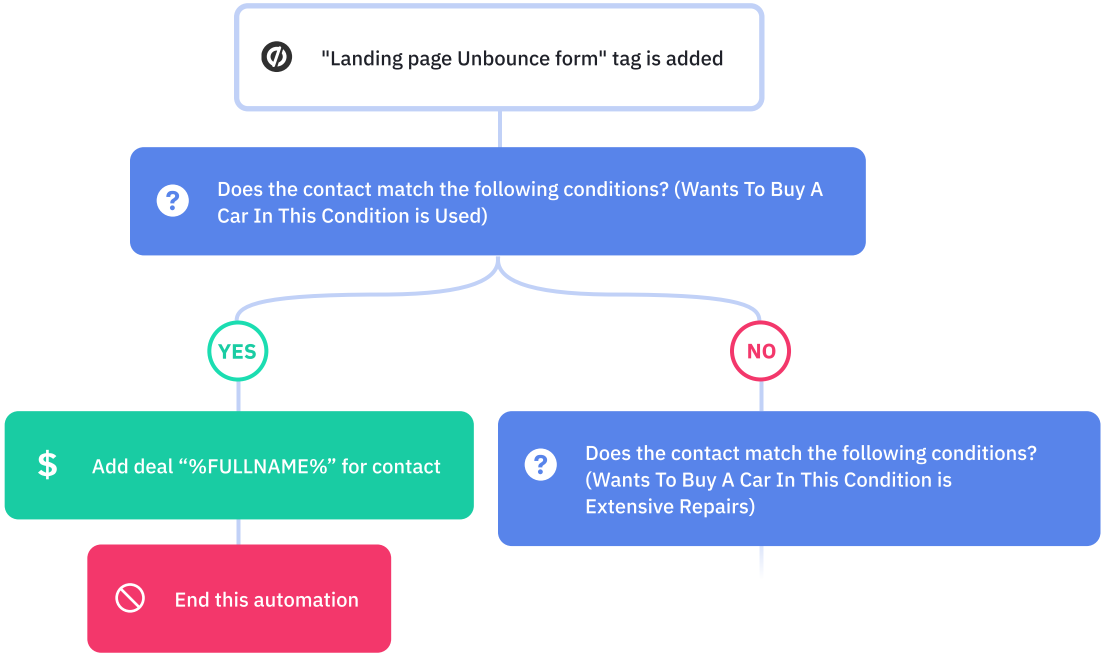
Lists are a broad form of segmentation and usually indicate a contact's status: active, open vs. closed deal, customer vs. non-customer, etc.

A **tag** indicates contact attributes that are time-sensitive or subject to change; things like having downloaded a certain lead magnet, attended an event, or signed up for a demo.

Custom fields are the most targeted and personalized level of segmentation. A custom field is a specific data point within a contact's profile. Examples of custom fields are Twitter handle, birthday, type of pet, business size... pretty much any data point you want to collect about a lead can be stored in a custom field.

Here are a few ways you can use segmentation in your sales automations:

- When a contact downloads a lead magnet, automatically tag the lead source so that you can track where your most valuable leads come from.
- Send targeted content to different contacts based on a tag. For example, if a contact is tagged as interested in a certain service, enter them into a lead nurture flow focused on that service.
- Use custom fields to fill in contact details in your emails, like business location or industry. This lets you personalize your sales emails while still automating your outreach.
- When a contact repeatedly views your pricing page, automatically invite them to book a sales call with your team



When a contact submits an integrated form, create and segment a deal based on the information they submit. You can segment your contacts based on any information they submit via your form. Get the Add a Segmented Deal Automation Recipe here.

2 Find your most qualified leads with lead scoring

Some people are almost ready to buy from you — and some are in danger of not becoming customers at all. How can you tell who is who?

Lead scoring lets you measure how engaged and qualified each lead is — without manually counting how many times they've answered your calls or replied to your emails. With automation, you can update scores based on calls, email engagement, and site activity, so you always know which leads are ready to talk to your team.

Lead scoring helps you focus on your most qualified leads. A good lead scoring model helps you prioritize leads based on:

- How likely they are to close
- How much they're likely to spend
- How quickly they're likely to close

To set up a lead scoring system, you have to figure out what behaviors and characteristics matter. When a lead takes an action, what does that tell you about what they want? Based on those criteria, each lead gets a numerical score.

You can adjust a lead score based on almost any action a lead takes, including:

- Any contact field (including custom fields)
- Email behavior (opens, clicks, forwards, replies, unsubscribes, etc.)
- Website behavior (pages visited, time on page, etc.)
- Form submissions

If you offer more than one product or service, you can set up multiple lead scoring systems, so that you can track interest for each of your offerings individually.

You can use automations to:

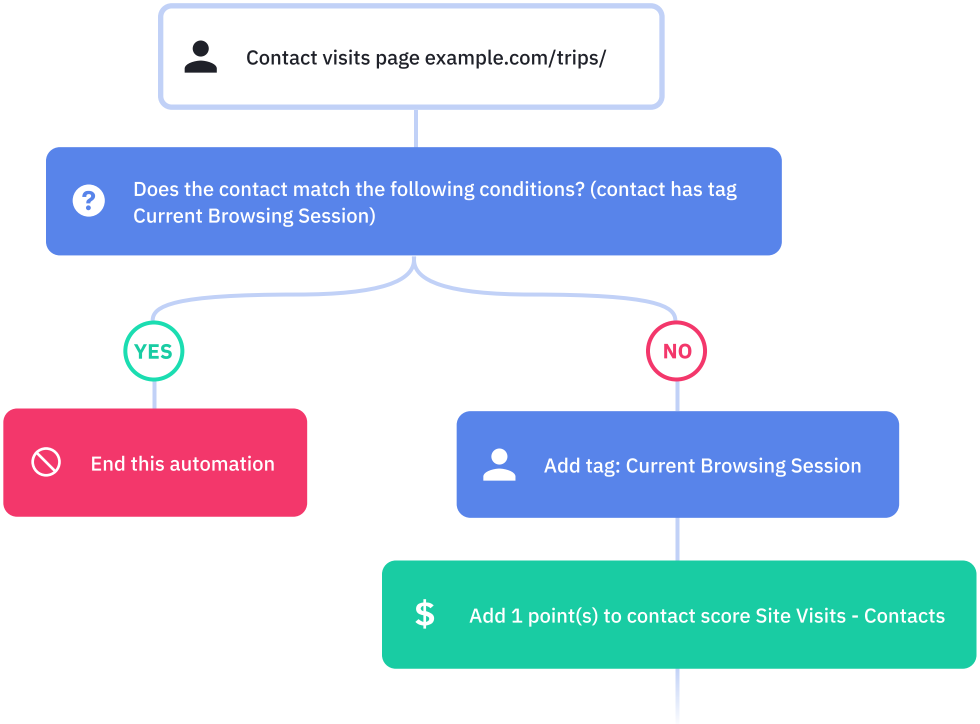
- Adjust a contact's lead score when they take a certain action
- Notify a salesperson and assign them a task when a contact reaches a certain lead score
- Enter a contact into an email series once they reach a certain lead score

...so your sales team can spend time on the leads that matter most.

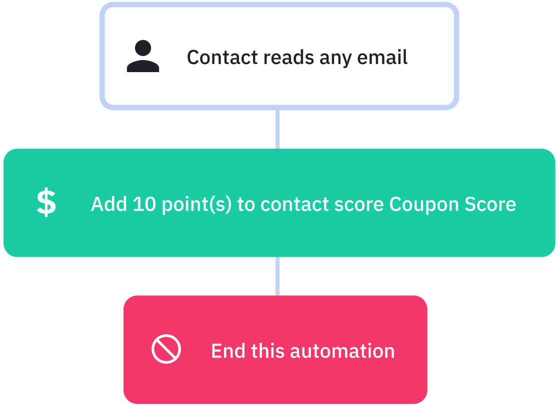
How to use automations to adjust lead scores

You can set up automations to adjust lead scores when a contact:

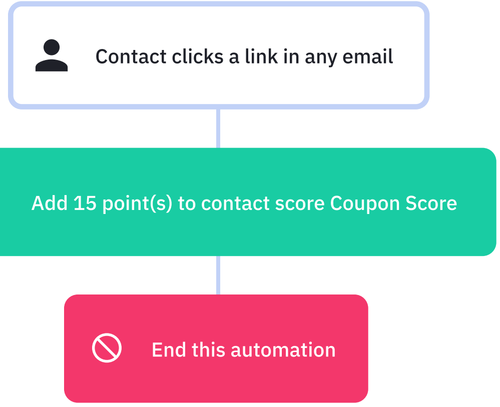
- Opens an email
- Visits your pricing page
- Achieves a goal
- Clicks a link in an email
- Purchases a product
- Schedules a meeting
- Replies to your email
- Completes an automation
- Downloads a lead magnet
- Visits a product page
- Abandons a cart
- Registers for a webinar
- Unsubscribes from a list
- Attends an event



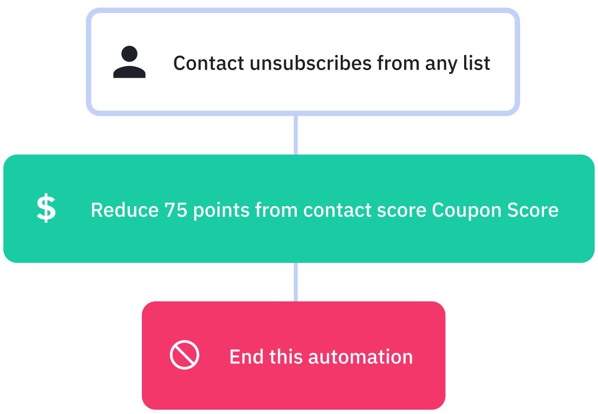
When a contact visits a specific page (or pages) on your website within a specific date range, automatically add points to their lead score. Get the Contact Scoring for Site Visits Automation Recipe here.



Automatically add points to a contact's lead score each time they open an email from you. Get the Add Points for Email Opens Automation Recipe here.



When a lead clicks on a link in an email, they're even more engaged than if they opened the email without clicking. Automatically add (more) points to a contact's lead score when they click on a link in an email. Get the [Add Points for Campaign Link Clicks Automation Recipe here.]



If a contact unsubscribes from one of your lists, they're just not that into you. Deduct points from a contact's lead score when they unsubscribe from one of your email lists. Get the Deduct Points for List Unsubscribe Automation Recipe here.

Automated lead scoring in action

Screensharing platform Airtame uses automated lead scoring to make their sales pipeline more efficient. By automating lead nurture, only the most qualified leads reach the sales team.

Airtame tracks two separate lead scores to improve their conversion rate:

1. Customer Fit score: How closely does the lead's profile match Airtame's ideal customer?

2. Engagement score: How often is the lead interacting with Airtame's emails?

Customer Fit and Engagement lead scores are automatically updated based on activity and contact information.

The two lead scores are added together. If the combined score is high enough, the sales team gets tagged in to help.

Airtame updates its lead scores based on:

- Which lead magnet the lead came through
- What information contacts provide
- The lead's level of website interaction

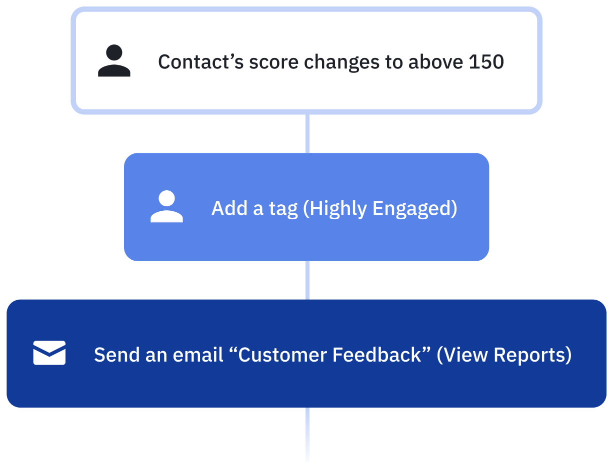
You can update a lead score based on almost anything you can track in ActiveCampaign. Airtame chose these criteria because they found that certain types of contacts are more likely to become customers.

How to use lead scoring to trigger automations

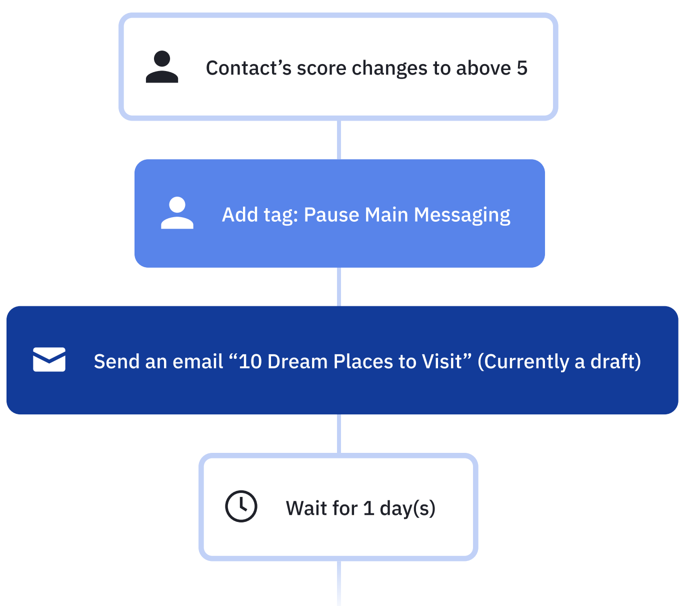
When a contact hits a certain score, you can automatically:

- Enter them into a targeted email drip series
- Assign a task for your sales team to reach out
- Send them a coupon or other special offer

Send your most engaged contacts the information they need, then make an offer that's a no-brainer. Lead scoring + marketing automation = a match made in sales automation heaven.



Your most engaged customers are also the most likely to respond to requests for feedback. When a contact reaches a certain lead score, automatically reach out to request customer feedback. Get the *Email Highly Engaged Customers for Feedback Automation Recipe here.*



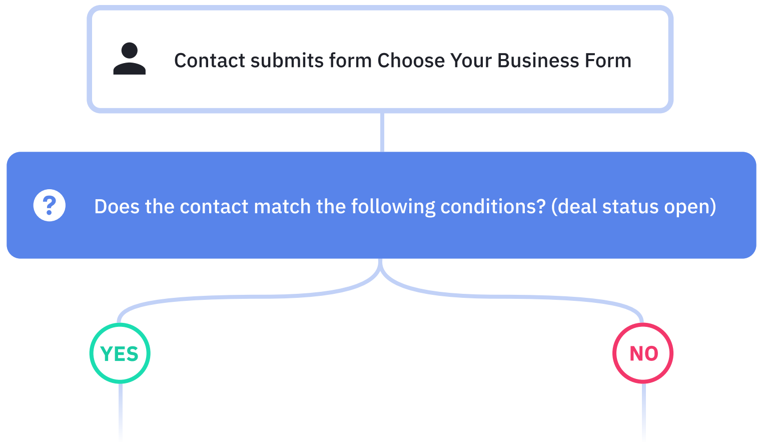
When a lead reaches a certain score, automatically pause your main marketing campaign and enter them into a focused sales drip email campaign. Get the *Focused Sales Drip Automation Recipe here.*

3 Create and update deals automatically

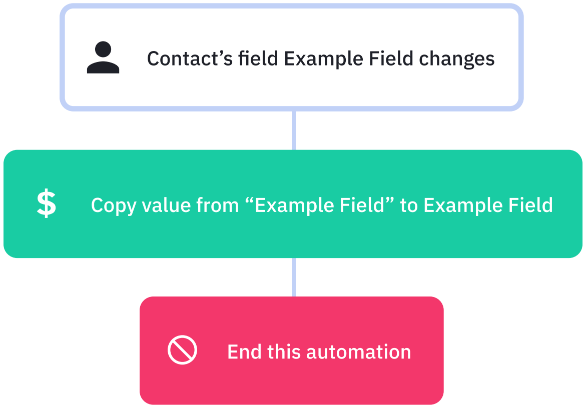
Automating the flow of data into and out of your CRM can save you hours per week.

With sales automation, you can automatically:

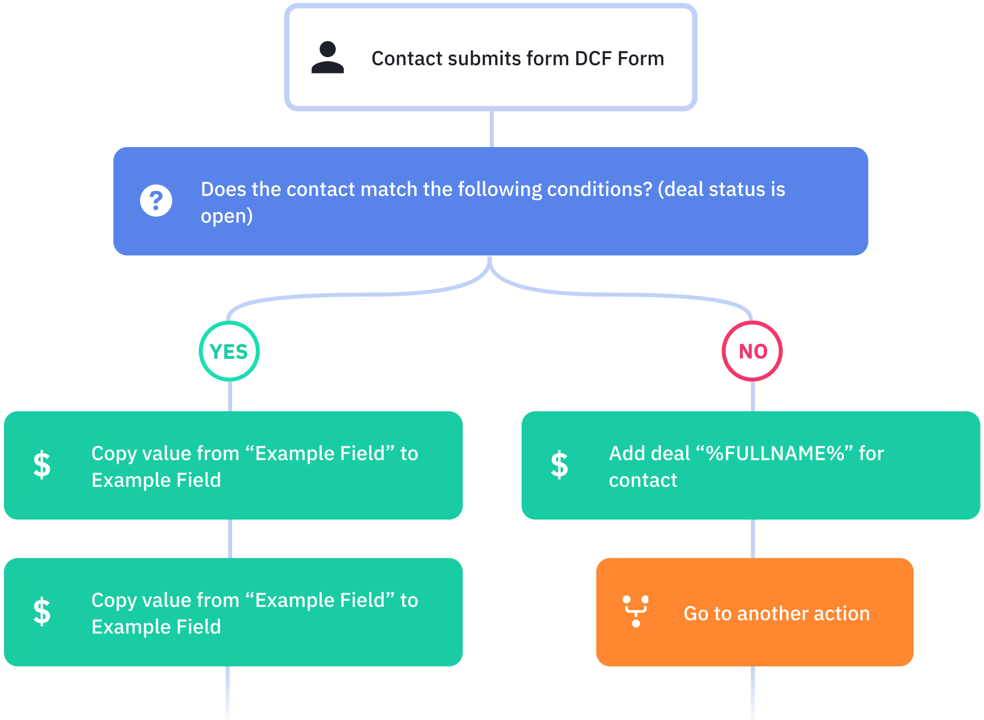
- Create a new deal when a lead fills out a form, downloads a lead magnet, or requests a demo
- Update deal owners based on a lead's actions
- Update a contact's custom fields
- Move deals to a new stage
- Mark a deal as won or lost
- Update a deal's value



When a contact submits a form on your website, create a new deal and import your contact's information from the form to your CRM with the [Create Deal from a Form Automation Recipe.]



When an existing contact submits a form with updated information, automatically update their deal record accordingly. Get the [Sync Deal Fields From Contact Custom Fields Automation Recipe here.]



When a lead submits a form on your website, automatically update each field in their contact record accordingly — no manual data entry required. Get the [Sync Deal Fields From Form Submission Automation Recipe here.]

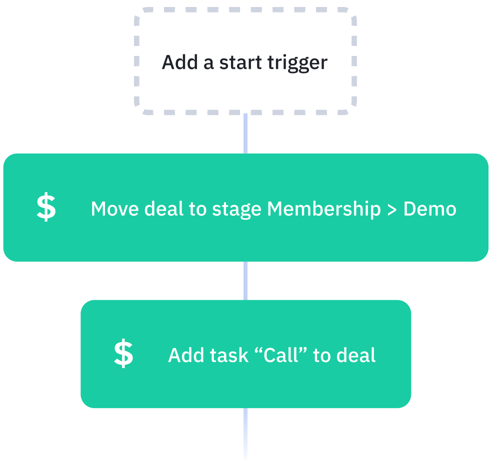
How to use automation to move deals through the sales pipeline

Each pipeline stage is a bucket you place leads in until they move forward in your sales process. When a lead moves to a new stage in the pipeline, there's probably a notable event that took place — a meeting scheduled, contract signed, demo given, etc.

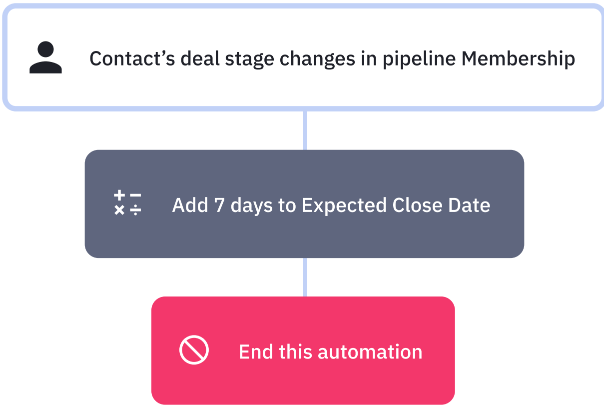
With sales automation, you can automatically move the deal to the next stage of the pipeline when a significant event takes place. This makes sure that your deals are always exactly where they should be in your CRM — without you manually updating each deal.

Sales automation lets you move deals through pipeline stages:

- When a task is marked as completed, move a deal to the next stage in the pipeline
- When a deal moves to a new pipeline stage, adjust the expected close date
- When a lead schedules a call or fills out a form, update the pipeline stage



Automatically move deals through your sales pipeline. As soon as a task is marked complete in your CRM, this automation moves a deal to the next stage of your pipeline and assigns a new task to the deal owner. Get the [Move Deal to the Next Stage When Task Is Completed Automaton Recipe here.]



When a prospect moves to new CRM pipeline stages, automatically add or subtract days to their expected close date. Get the [Adjust Expected Close Date on a Deal Automation Recipe here.]

How to use integrations to automate your pipeline

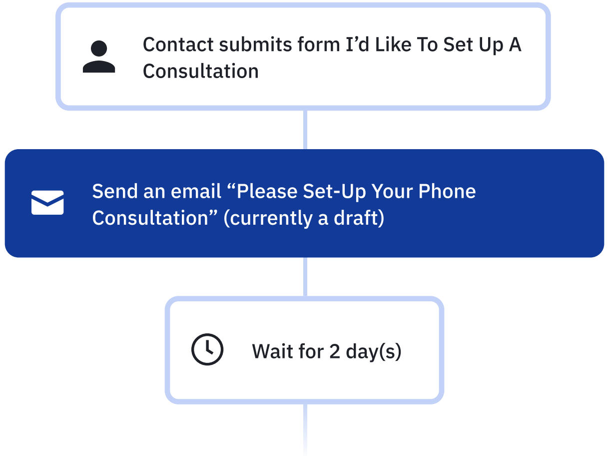
If you have third-party tools that integrate with your CRM and marketing automation platform, you can use those integrations to automatically create deals and move them through pipeline stages:

- **Appointment scheduling** solutions such as Calendly can move deals when demos, consultations, and calls are scheduled
- **Document signing platforms** like DocuSign and ApproveMe can move deals when documents are read, signed, and returned
- **Payment solutions** like Paypal, Stripe, Shopify, and Woocommerce can move deals when payments are made.
- **Zapier's "Update deal" action** can help you move deals through stages with events from 700+ apps

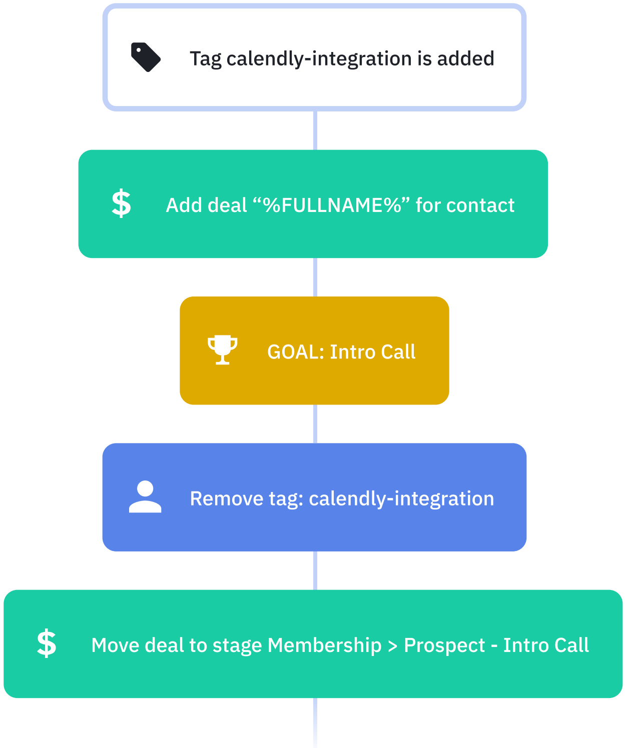
Website, scheduling, and ecommerce integrations pull and display valuable information about the customer experience, so you know exactly when a contact:

- Makes a purchase
- Books an appointment
- Submits a form
- Visits a product detail page more than once
- Downloads gated content
- Uses a promo code
- Engages with your website or blog
- Signs up for an event

...and update their contact info or move their deal record accordingly.



When a lead requests a consultation, automatically share your calendar (from Calendly or another online scheduling tool) so that the contact can easily schedule a consultation call or consultation session. Get the [Set up Consultation Call with Calendar Integration Automation Recipe here.]



When a lead books a meeting through Calendly, update their deal stage and move them through your sales pipeline accordingly. This automation makes it easy to move contacts through those deal stages based on the type of appointment they book. Get the [Calendly: Update Deal Stage Automation Recipe here.]

4 Nurture leads throughout the sales funnel

In a perfect world, you would have time to personally reach out to every lead who enters your pipeline.

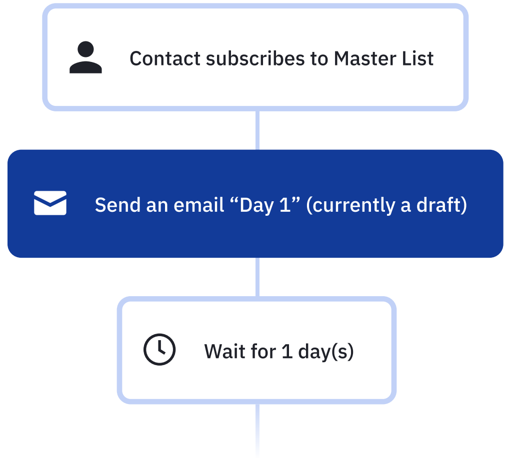
For most sales teams — especially if you're trying to scale up quickly — that's not realistic.

You have to carefully balance the efficiency of automation with the knowledge that your leads probably prefer 1-to-1 communication. One strategy is to reach out personally to a new lead, and if they don't reply, enter them into an automated lead nurture email series.

As soon as the lead responds, you can automatically remove them from the automated sequence and get them in touch with a salesperson for a more personalized experience. This lets your sales team focus on engaged leads and rely on automation to warm up cold leads until they're sales-ready.

Building lead nurture campaigns for through your marketing automation platform helps you:

- Warm up cold leads
- Shorten the sales cycle
- Share different information depending on how familiar they are with your brand
- Customize the content based on what they've clicked, downloaded, or shared
- Create a personalized experience throughout the sales funnel



Nurture new leads and increase engagement with this 7-day drip email automation. [Get the 7-Day Drip Series Automation Recipe Here.]

Add personalization to your event invites. If a contact is part of an open deal, automatically assign a task for deal owners to personally invite your prospects. If the deal status isn't "open," automatically enter the contact into an event drip email series. Get the [Event: Email or Personal Invite Automation Recipe here.]

You can automate the customer experience beyond lead nurture, too. When a deal is marked as "Won," begin the customer onboarding process by automatically:

- Entering the contact into an onboarding email series
- Notifying your onboarding team and assigning a task to set up an onboarding call
- Sending webhooks to other apps

Automation can also help you bring back lost deals. When a deal is marked as "Lost," automatically enter the contact into a drip series of win-back emails to keep your company top-of-mind if the lead needs your services in the future.

5 Assign tasks and leads to your sales team

Automation can help keep your sales team organized and aligned, so they can focus on doing what they do best: Closing deals.

With automation, you can:

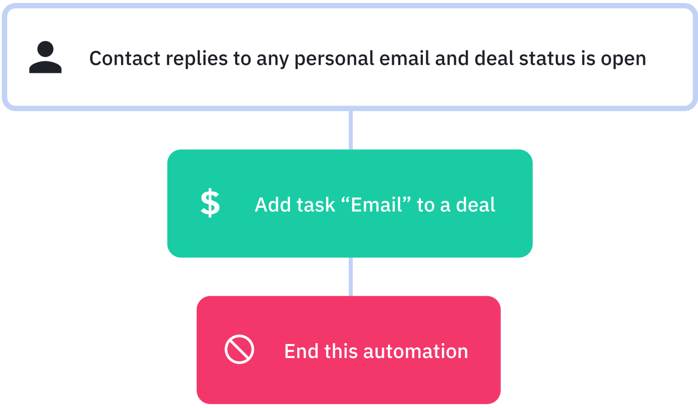
- Notify a sales rep when their lead takes action. If a lead browses specific pages or puts in a pricing request, send an automatic notification so that your salesperson can follow up directly.
- Let salespeople know which leads are heating up. Automatically trigger email notifications and assign tasks based on lead score changes, so you can always follow up with the deals most likely to close.
- Distribute new leads across your sales team — no round-robin spreadsheet or random number generator required
- Assign tasks to individual salespeople, then trigger new automations once a task is marked as completed

How to use automations to assign tasks to your sales team

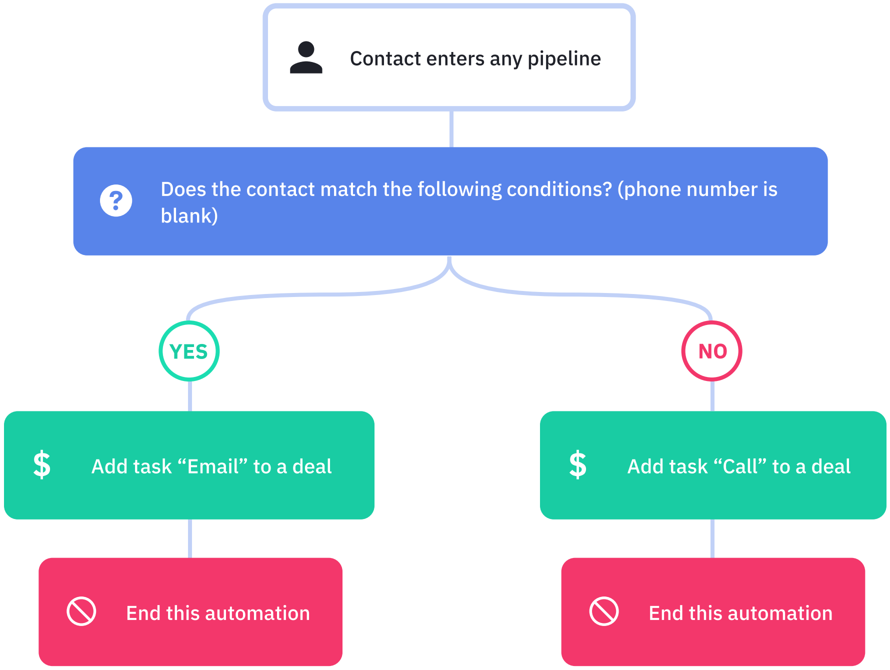
Stop sales tasks from getting forgotten or piling up. Use sales automations to assign tasks to your sales team when a contact completes a certain action or reaches a certain lead score. You can also add notifications from within sales automations and nurture campaigns to remind your team to follow up with their leads.

You can automatically assign a task:

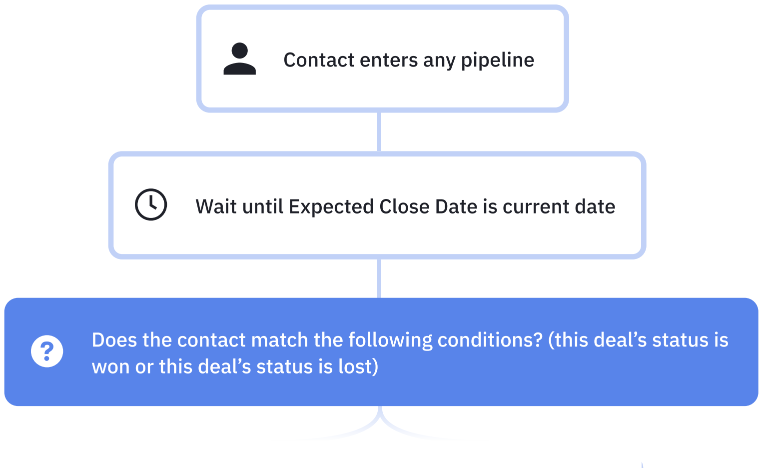
- When a lead replies to an email you've sent
- When you complete other tasks, so you have perpetual next-actions driving things forward
- When a contact completes a target behavior (Goal)
- When a lead reaches a certain contact score



When you get an email from an open-deal contact that requires a follow-up, automatically create a task for the deal owner to reply. Get the [Email Follow-up Reminder Automaton Recipe here.]



When a new deal enters your pipeline, how does the deal owner know whether to call or email them? Do they have to scour the contact profile for an email address or phone number? What if there's no phone number listed? If a contact does not have a phone number listed, the automation creates and assigns a task to email the contact instead. Create Task to Call or Email New Deal Automation Recipe here.



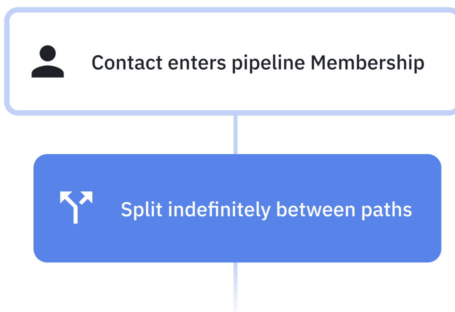
Automatically notify a deal owner when a deal hasn't closed by the expected close date. This lets the deal owner know that they need to mark the deal as a cold lead, mark the deal as lost, or double down on their efforts to win the deal. Get the Notify When a Sales Deal Has Not Closed Automation Recipe here.

How to automate lead distribution

You can also use sales automation to automate lead distribution. ActiveCampaign lets you automatically assign leads to different sales team members.

You can distribute leads based on:

- A round-robin format
- Lead score
- Win probability
- Territory
- Deal value



This automation evenly distributes sales leads to each deal owner. Send leads to each deal owner working on a sales pipeline in sequential order — even if a new deal owner is added to or removed from the automation. Get the Evenly Assign Leads to Deal Owners Automation Recipe here.

To make the most of automation for your sales team, make sure to connect your marketing automation platform to your CRM. This keeps your sales team up-to-date on everything your leads have done so far:

- Lead source
- Lead score
- Website activity
- What content they've looked at
- Which emails they've received
- Segmentation

Having this info on-hand helps balance personalization and automation to provide the best experience to each lead — and close more deals.