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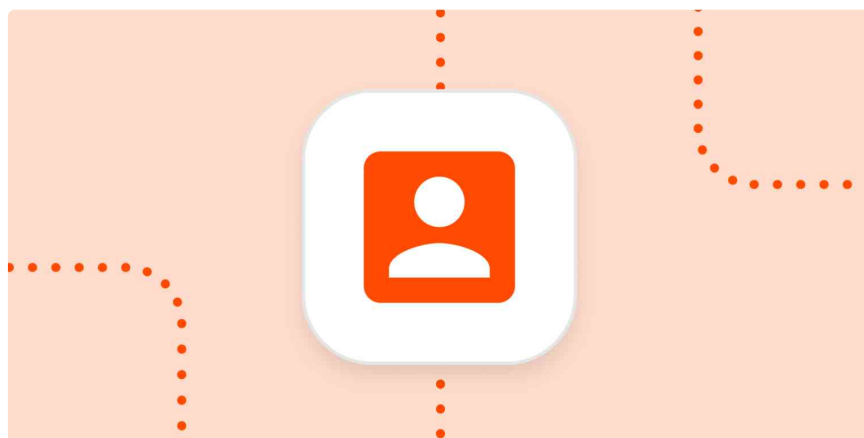Home ❯ Automation with Zapier ❯ Automation inspiration

Automation inspiration 5 min read

6 ways automation can help you nurture and manage leads

By Jack Beaudoin · January 5, 2022

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"Any sufficiently advanced technology is indistinguishable from magic," the futurist and sci-fi writer Arthur C. Clarke once wrote. He was obviously talking about lead nurturing and management— right?

The last decade has seen a ton of technological wizardry all trying to solve the same challenge: *In this hypercompetitive digital era, how can businesses attract, nurture and retain new customers?*

The buyer's journey is complex. Researchers report that leads encounter between five and ten marketing touches on their purchasing path. Encouraging your leads to progress down the sales funnel—qualifying them, converting them to prospects, and ultimately to customers—while tracking their engagement and touchpoints across different channels is a huge challenge.

Fortunately, lead management automation can supply a little magic of its own. By eliminating the need to duplicate or manually enter data into different marketing tools, automating your lead nurture can boost your productivity and keep your leads and current customers engaged with your brand.

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How automation can help you manage and nurture leads

Maintaining the flow of leads is often tedious work with lots of manual interventions. There are so many moving parts—forms, CRMs, email marketing lists, eCommerce platforms, to name only a few. And shuffling information between these apps can overwhelm even the most seasoned marketing pro. But with automation, you can simplify your lead generation workflows by connecting your lead sources to your lead management tools.

Zapier is a no-code solution that helps you automate repetitive tasks between two or more apps. For example, if a lead completes a survey on your site, you can create a Zap—our word for our automated workflows—to automatically take the captured data and send it to your CRM. Or, if a site visitor signs up for one of your events, you can use automation to automatically send a confirmation email with a link to a personalized landing page.

> Zapier lets you automatically send information from one app to another, helping you reduce manual tasks. Learn more about how Zapier works.

You can create Zaps from scratch in the editor, which guides you through the process step-by-step. Or if you're new to Zapier, you

can use a Zap template—our term for our pre-made templates. We've collected some of the most popular lead nurture workflows to get you started.
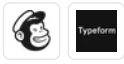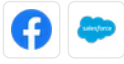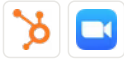
Manage leads from forms and registrations

One of the biggest challenges of lead management is dealing with the many places your leads come from. Most businesses use a combination of web forms, ads, eCommerce transactions, and events to find new prospective customers. At the same time, you probably also want to track and manage those leads in one central app, like your CRM or marketing platform.

Instead of moving those leads into your preferred app by hand— either by copying and pasting or exporting and then uploading a CSV file—you can set up Zaps to do it for you.

For example, if you use Typeform to collect information from potential customers, you can use a Zap to add it to Mailchimp so you can also add them to your mailing list. Or, if you're hosting a webinar and want to make sure your sales team follows up with registrants, you can connect a tool like Zoom with your CRM.

Here are a few Zap templates to get you started:

Create Mailchimp subscribers from new Typeform responses
Mailchimp + Typeform

Use this Zap

Add new Facebook Lead Ads leads as leads in Salesforce
Facebook Lead Ads + Salesforce

Use this Zap

Turn new Zoom registrants into HubSpot contacts
HubSpot + Zoom

**Use this Zap**

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Use surveys to nurture your leads and customers

You might get some basic demographic data using a drive-by form or registration. But that first contact point probably won't tell you why a particular lead landed on your site, their role in a purchasing decision, or the scope of the deal that's at stake. To craft a compelling customer experience, you want to understand as much as you can about your new lead.

Surveys help you take the lead generation process beyond the data gathering phase and into nurturing and real customer engagement. With apps like Typeform and SurveyMonkey, you can craft appealing conversations—leveraging videos, interactive animation, and branching logic—with existing leads to learn more about their specific needs.

And automation can help you move that rich, segmentable data anywhere you need it—whether that's adding more data to a shared spreadsheet or updating a record in a marketing automation app.

Add new SurveyMonkey responses to new Google Sheets rows Google Sheets + SurveyMonkey	**Use this Zap**

Create or update leads on Marketo from new Typeform entries Marketo + Typeform	**Use this Zap**

Create or update HubSpot contacts from new submissions on Formstack Formstack + HubSpot	**Use this Zap**

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Nurture your eCommerce customers

Once someone purchases your product or service, they become an entirely different type of lead—a customer, one you want to work

as hard as possible to retain. By taking those purchasers and automatically turning them into qualified leads in your sales app, you can easily nurture and maintain that relationship without all of the monotonous work of merging and massaging data.

	Add new Shopify customers to ActiveCampaign ActiveCampaign + Shopify	**Use this Zap**
	Add new PayPal customers to ActiveCampaign as contacts ActiveCampaign + PayPal	**Use this Zap**
	Create or update HubSpot contacts for new Bigcommerce customers BigCommerce + HubSpot	**Use this Zap**
	Create Salesforce leads from new Amazon Seller Central orders Amazon Seller Central + Salesforce	**Use this Zap**
	Add new Square customers to Mailchimp Mailchimp + Square	**Use this Zap**

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> For more tips and tricks on automating your eCommerce brand, check out our guide to how to automate your eCommerce business.

Nurture mailing list subscribers

When you *do* acquire a new lead, getting them into the proper email marketing channel is critical. You'll not only want to ensure they receive timely communications from you, but that your message matches the reasons they reached out in the first place.

But keeping systems up-to-date is tricky, especially if you track contacts, leads, and deals in a CRM, and send marketing emails through a dedicated email newsletter platform. Automation can ensure every contact added to one place is also added to the other.

You can also update or create new contacts in your CRM whenever a subscriber is added to a specific list in your email marketing software.
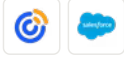
Add new HubSpot contacts to Mailchimp lists HubSpot + Mailchimp	**Use this Zap**
Add ActiveCampaign contacts from new Formstack submissions ActiveCampaign + Formstack	**Use this Zap**
Add new Salesforce leads to Constant Contact Constant Contact + Salesforce	**Use this Zap**
Create Emma subscribers from Wufoo form entries Emma + Wufoo	**Use this Zap**
Update contacts in Flodesk from new WooCommerce orders Flodesk + WooCommerce	**Use this Zap**

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Follow up with event attendees

Event management is a tough gig. The good news is, you don't need to deal with the added stress of manually adding event attendees to your CRM or email marketing app. Instead, connect your event and contact management tools.

You can automatically tag contacts that come through your event platform, ensuring they receive communication specifically for them and that every attendee is signed up for event-specific nurtures.

Add new Eventbrite attendees to a Mailchimp list Eventbrite + Mailchimp	**Use this Zap**
Create HubSpot CRM contacts from	

	new Cvent event registrations Cvent + HubSpot	**Use this Zap**

	Add new event attendees in Hopin to Hive as contacts Hive.co + Hopin	**Use this Zap**

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Automate email responses

Sometimes, you might want to follow up with a lead personally. Knowing you took the time to reach out can mean a lot to the lead. You probably don't have the time, though, to write original responses to every single person who contacts you. So—automate it. Then you can invest your time and energy into nurturing those leads as they move down your marketing funnel.

	Send an email when a new lead comes in Facebook Lead Ads + Gmail	**Use this Zap**

	Send emails or get email notifications via Gmail for new Sumo subscribers Gmail + Sumo	**Use this Zap**

	Send Microsoft Office 365 emails with new contact activity in ClickFunnels ClickFunnels + Microsoft Office 365	**Use this Zap**

	Send Microsoft Office 365 emails when HubSpot deals are in a new stage HubSpot + Microsoft Office 365	**Use this Zap**

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Scale your lead nurture with automation

Somehow you need to manage and nurture an ever-growing number of leads, from an ever-growing number of sources, in a way

that makes all your customers feel known and valued. So how do you scale yourself up to the challenge? Offload the most repetitive, manual tasks to your Zaps and stay focused on high-touch efforts.

Here's another way to think about it. If every new contact really needs ten touchpoints before completing a purchase, and you want to convert just 5,000 leads this year, that's 50,000 interactions (nearly 200 every weekday) to manage, migrate, update, log, etc., to reach your goal. Without automation, your next best hope may be a magic wand.

Related reading:

- Grow your business with marketing automation
- How to research a digital marketing plan for your small business
- 6 ways to improve pay-per-click campaigns with automation

This article was created in March 2020 with information from previous articles authored for Zapier by Alison Groves and contributions by Hannah Herman. It was most recently updated in December 2021 by Jack Beaudoin.

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Jack Beaudoin

An inveterate note-taker and journalist, Jack Beaudoin has covered healthcare IT, the environment, pro cycling, global fisheries, grandparents, high school football rivalries, and ontology. He's based in Maine, but you can find him on LinkedIn.

TAGS   Automation   Lead management

CRM (Customer Relationship Management)   Forms & surveys

MENTIONED APPS   BigCommerce   Formstack   Google Sheets

Salesforce   SurveyMonkey   Wufoo   Mailchimp