

The beginner's guide to lead management

Everything you need to know about the lead lifecycle—and how automation can help you find, nurture, and win more leads.

1

Lead generation

Every customer starts as a lead. **Lead generation** is the process of gathering new leads who are interested in what your business has to offer. You can collect leads through a form on your website, a landing page, or ad tools. Most businesses collect leads from multiple sources.

The challenge

Quickly routing all your leads to the right place, like a spreadsheet, CRM, or email marketing tool—so they don't go cold and you can start nurturing them right away.

Use automation to:

- Instantly move leads into the right app
- Cut down on copy-pasting busywork
- Scale an otherwise time-consuming process as your business grows

Getting started

- Choose a **CRM** or **email marketing tool** (if you haven't already)
- Check out **the ad and conversion tools** that connect to Zapier
- Discover how you can **automatically route your leads** to the right app



Did you know?

According to a [HubSpot survey](#), the top priority for marketers is generating leads.

2

Lead qualification and nurture

Not every lead is qualified or ready to buy right away. Sometimes you need to provide more information about your business or product and its value first. This process is called **lead nurture**. You can nurture leads through different channels like email campaigns, retargeted ads, and old-fashioned human contact like demos and phone calls.

The challenge

Reaching leads with the right message, in the right channel, at the right time.

Use automation to:

- Reach out to new leads right away
- Send targeted emails at key touchpoints
- Assign leads to your sales staff for triage and outreach

Getting started

- Discover four ways to **automate your email marketing** for better communication
- Easily boost customer engagement and streamline your lead nurture with these **CRM workflows**



Did you know?

Of the people visiting your website, **96% of them** aren't ready to buy yet.

The power of automation

92%

of marketing agencies are [investing more time, resources, and budget](#) into marketing automation.

Zapier users save **10 hours** per week with automation on average.

What could you do with an extra 10 hours in your workweek?

3

Closing the deal

Yay! A lead's ready to make a purchase. But there's still work to do. Depending on what products or services your business offers, you'll need to send a contract, invoice, or receipt. You'll also want to track the sale internally.

The challenge

Making sure a new customer's first buying and billing experience goes smoothly.

Use automation to:

- Generate invoices and minimize errors
- Create, send, receive, and store digital contracts
- Track conversions across marketing channels

Getting started

- Discover three ways to **automate your Stripe payments**
- Streamline your contracting process** with automation
- Create a workflow that **tracks offline conversions**



Did you know?

The average customer uses **10 different channels** to communicate with companies.

4

Upsell, cross-sell, and brand advocacy

It's cheaper to upsell or cross-sell an existing customer than to win a new one—so it's important to keep nurturing customers even after they've made their first purchase. You can also turn satisfied clients into powerful marketing resources for your business by asking for reviews and testimonials.

The challenge

Cultivating a positive brand experience that is enjoyable and scalable—and can help you win more customers.

Use automation to:

- Seamlessly send targeted upsell emails
- Collect and share customer feedback and testimonials
- Delight customers with personalized thank yous or swag bundles

Getting started

- Discover how you can **scale your eCommerce business**
- Use automation to **publish and share content effectively**
- Learn how to **automatically collect customer feedback**



Did you know?

It costs **five times** as much to attract a new customer than to retain an existing one.



What part of the lead lifecycle will you automate first?