10 Key CRM Automations

Consider these options when deciding where to start with CRM automation.

Automate…	How…?
The lead lifecycle	Set up automated actions based on a leads progress through the sales funnel, e.g. assigning sales reps, sending welcome emails, and moving leads to the next stage when criteria is met.
Lead scoring	Assign scores to leads based on their activity and demographics, helping sales teams prioritize and focus on promising leads.
Communication with leads	Setting up automated email sequences and social media outreach to engage leads and keep them informed.
Reporting	Generate reports on key metrics, such as sales pipelines, lead conversion rates, and marketing campaign performance.
Workflows	Automate tasks within your CRM system workflow e.g. updating contact information, scheduling meetings and sending reminders.
Email marketing, welcome campaigns, nurture flows, onboarding etc.	Set up email campaigns to nurture leads, announce new products or promotions and help customers become familiar with your brand and products.
Social media	Schedule content and track social media mentions to engage with leads and build brand awareness.
Tasks and task assignments	Streamline workflows by triggering new tasks to be created when certain criteria have been met.
Invoice and payment reminders	Send polite, timely reminders for overdue invoices or upcoming deadlines.
Upsell and cross-sell campaigns	Show customers relevant products to complement their purchases.

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