



# 42

## Salesforce Automations

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**Every B2B Tech Company  
Should Be Running**

The complete automation playbook for operations managers scaling from \$3M to \$100M ARR.

Includes 42 ready-to-implement workflow diagrams across your entire revenue engine.

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# Revenue Pipeline

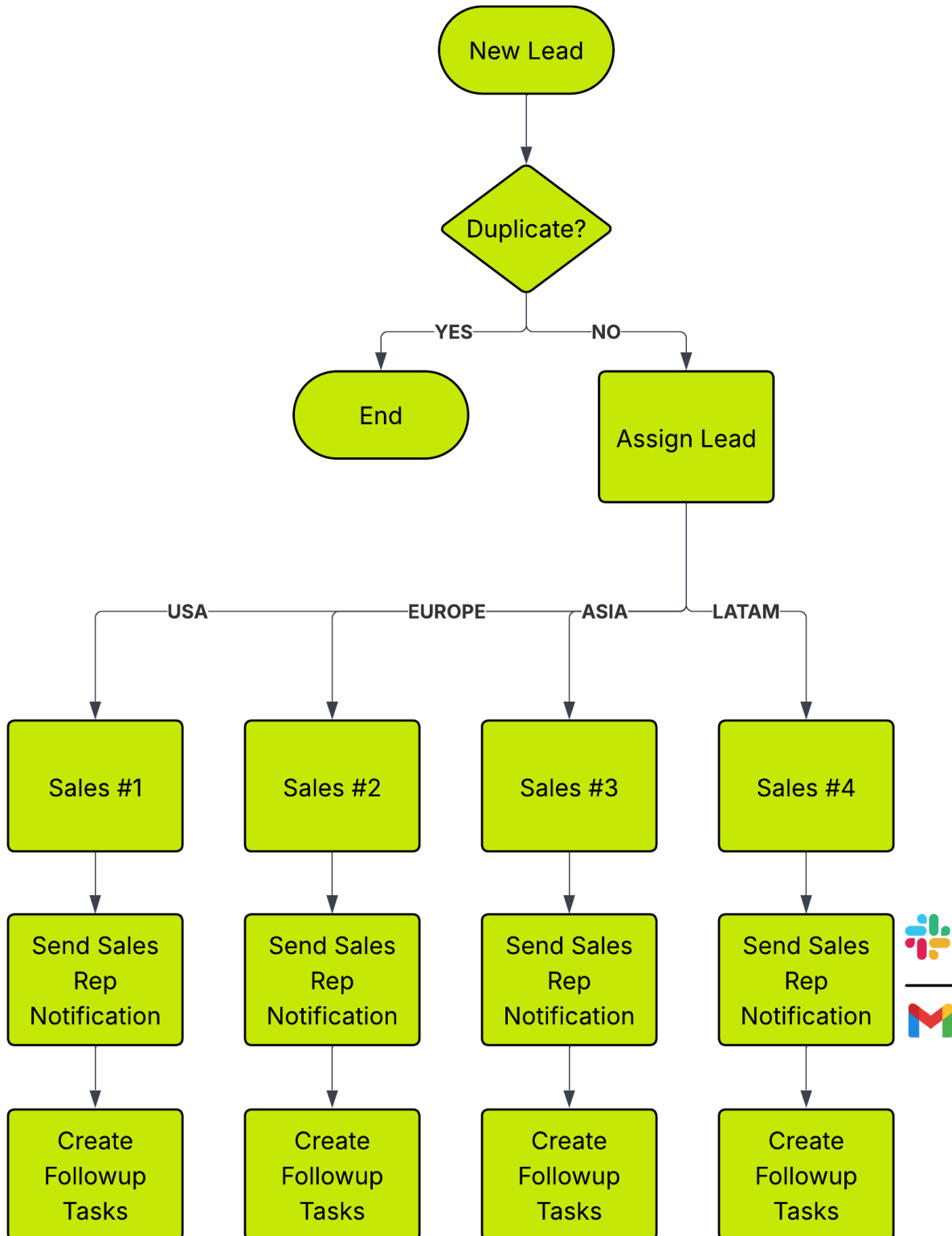
17 automations

Lead assignment through closed deals and renewals.

# 1. Auto Lead Assignment

Revenue Pipeline

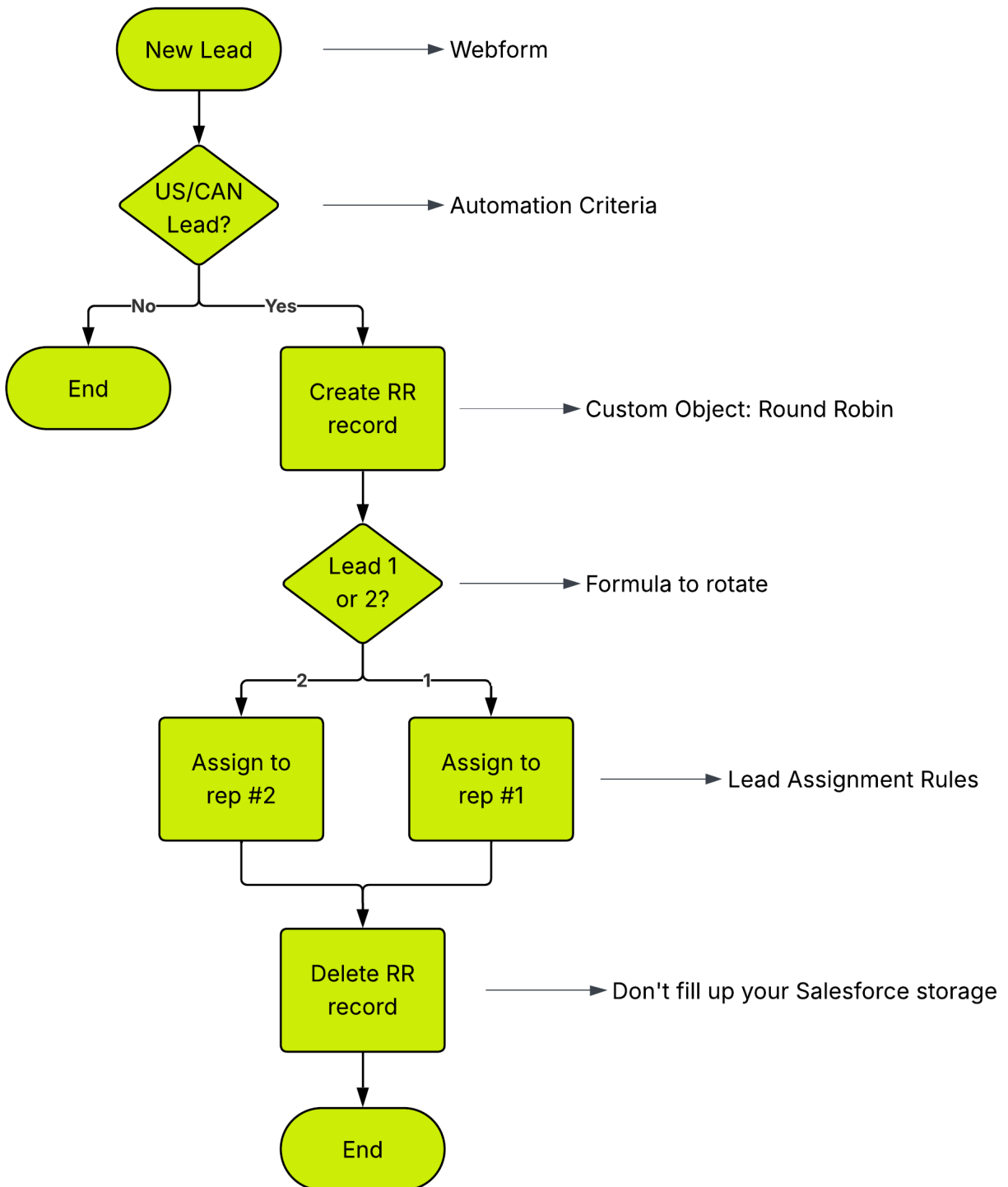
Send new leads to the right sales rep automatically so nothing slips through the cracks.



## 2. Custom Round Robin Assignment

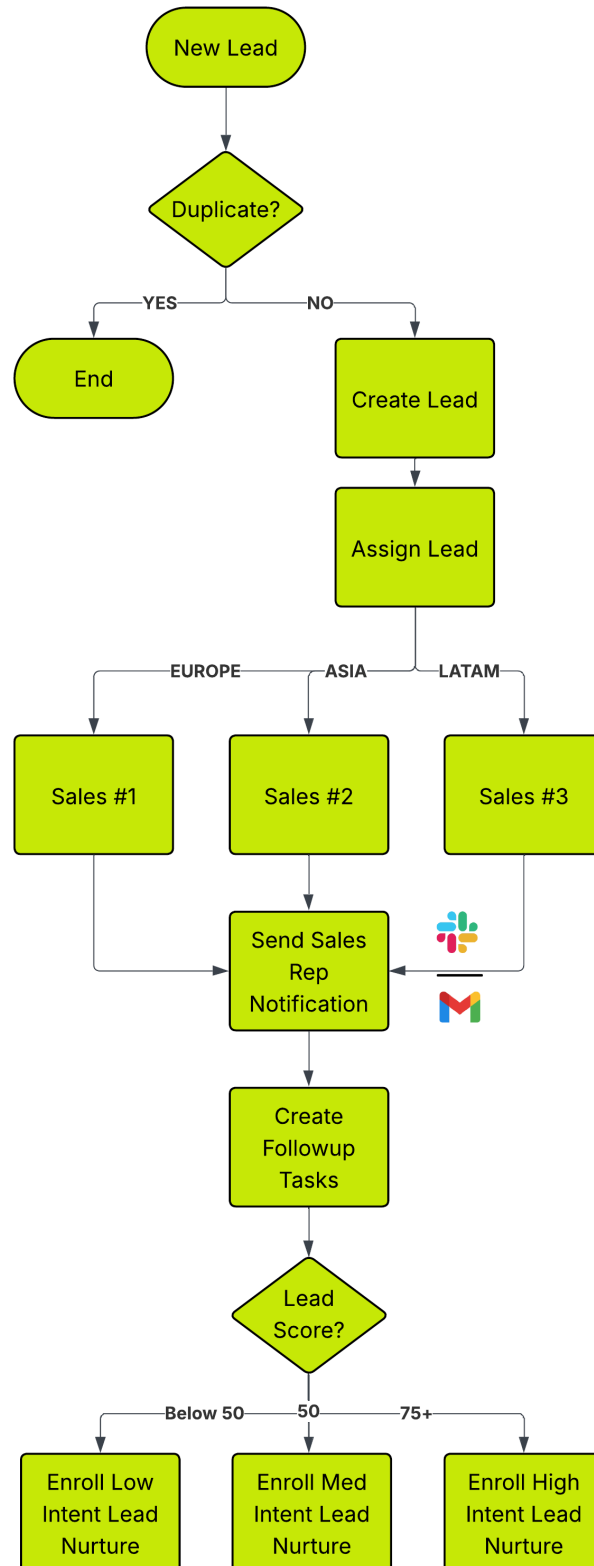
Revenue Pipeline

Split new leads evenly across your sales team so everyone gets a fair share.



### 3. Lead Qualification & Auto Assignment

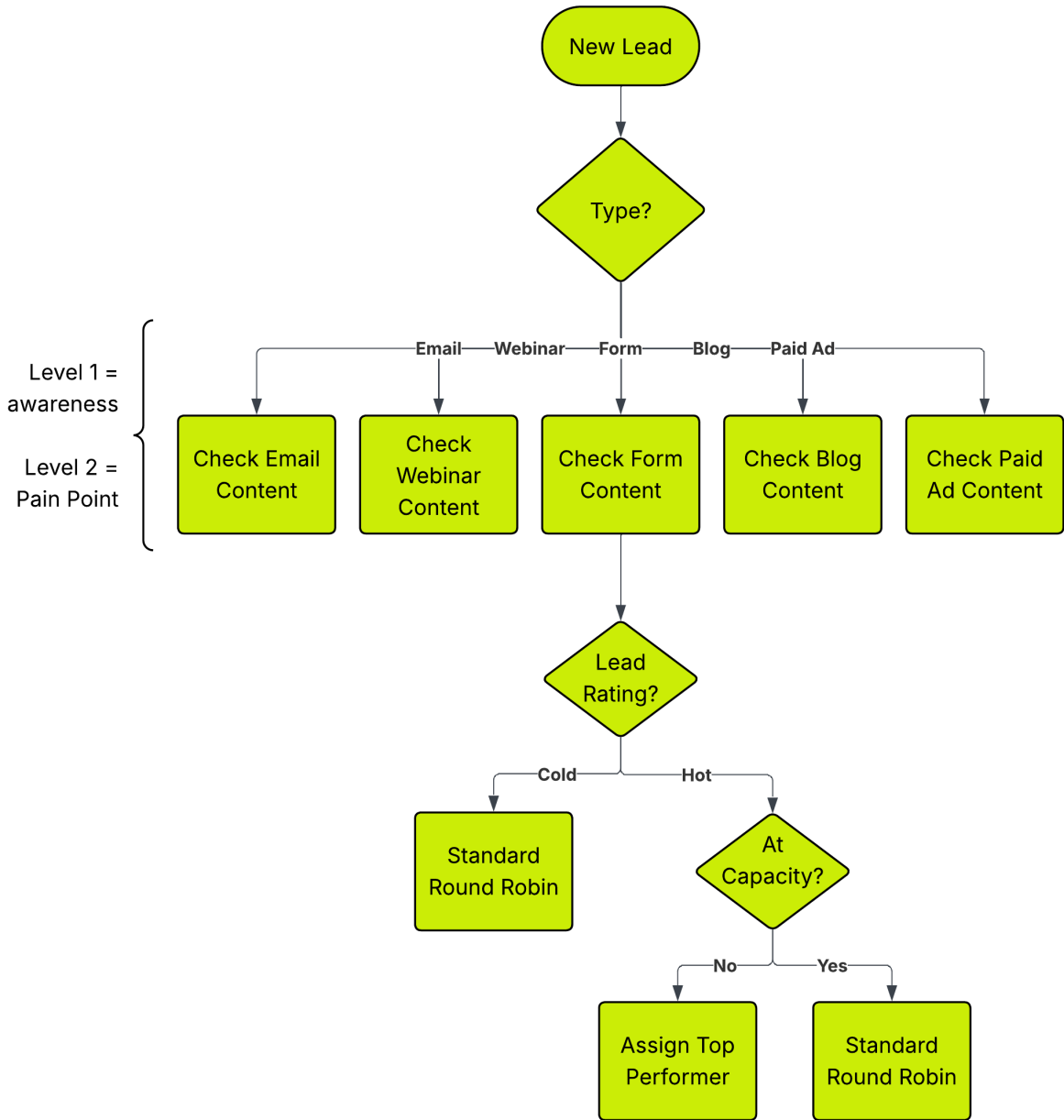
Score each lead and send them to the best rep based on how engaged they are.



# 4. Performance-Based Lead Routing

Revenue Pipeline

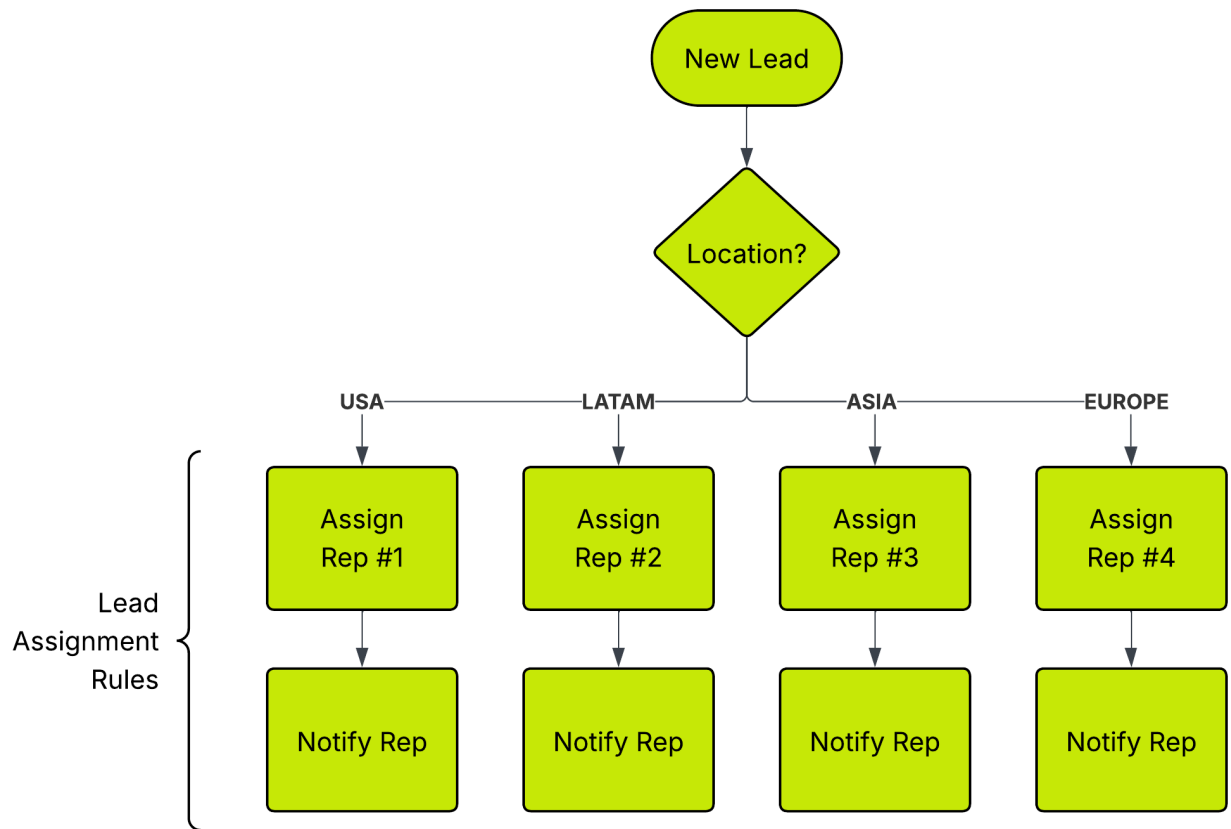
Give your best leads to your best reps so you close more deals.



# 5. Territory-Based Lead Assignment

Revenue Pipeline

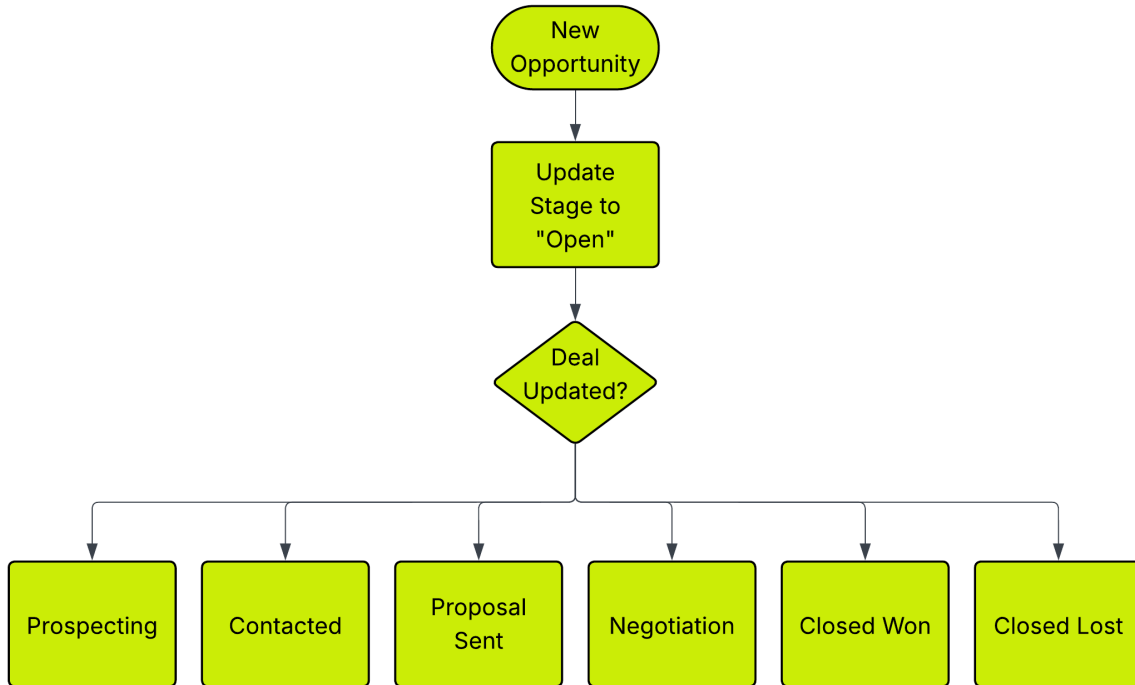
Send leads to the right rep based on where the lead is located.



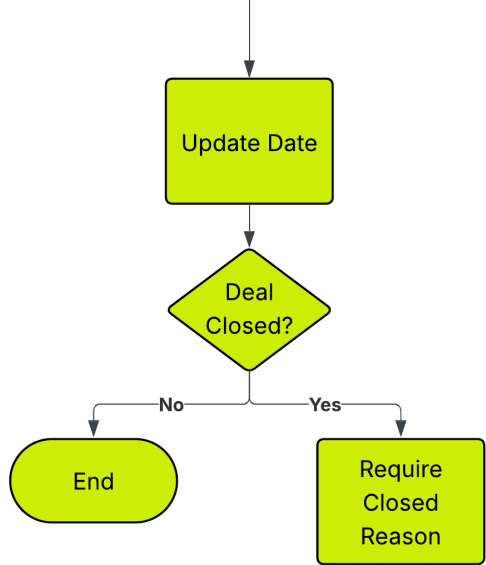
# 6. Sales Stage Process

Revenue Pipeline

Move deals forward in your pipeline automatically when key actions happen.



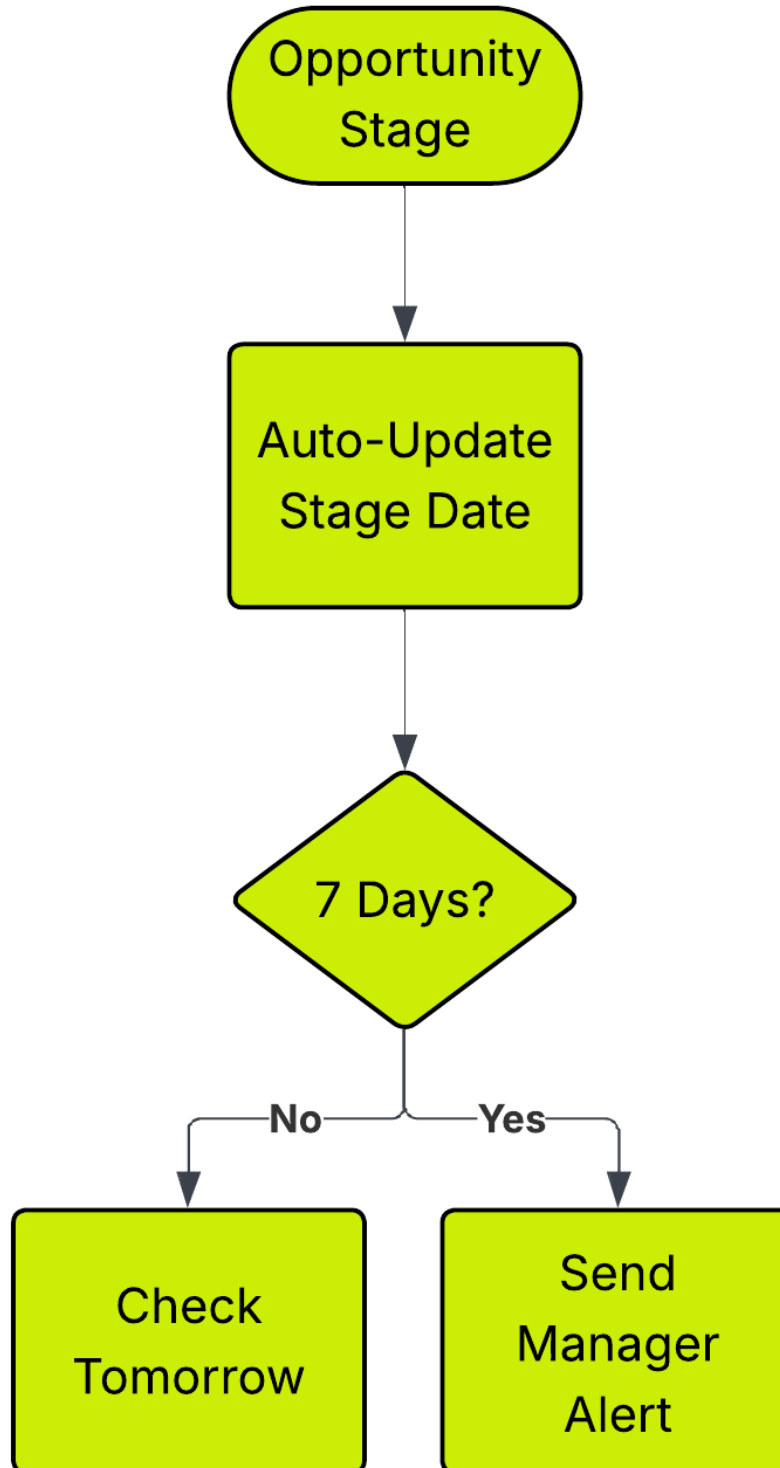
- Triggers:
- Prospecting = Rep manually starts researching opportunity
  - Contacted = Rep speaks to opportunity (email or call)
  - Proposal Sent = Rep sent proposal
  - Negotiation = Rep is actively negotiating terms
  - Closed Won = Contract has been signed & invoice received
  - Closed Lost = Opportunity refused to work with company



## 7. Deal Stage Management

Revenue Pipeline

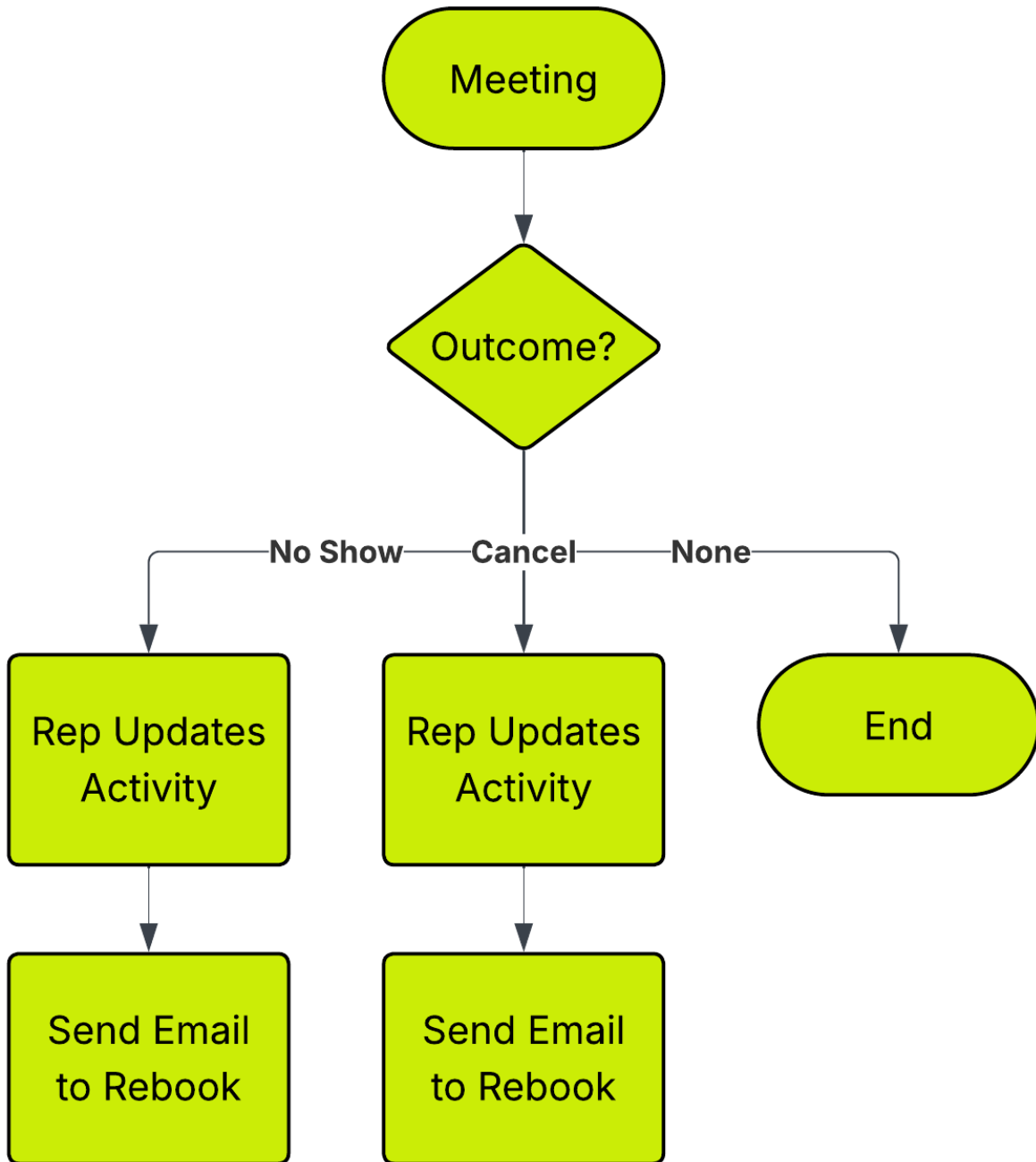
Get alerts when a deal sits too long in one stage so nothing goes stale.



## 8. Demo No-Shows

Revenue Pipeline

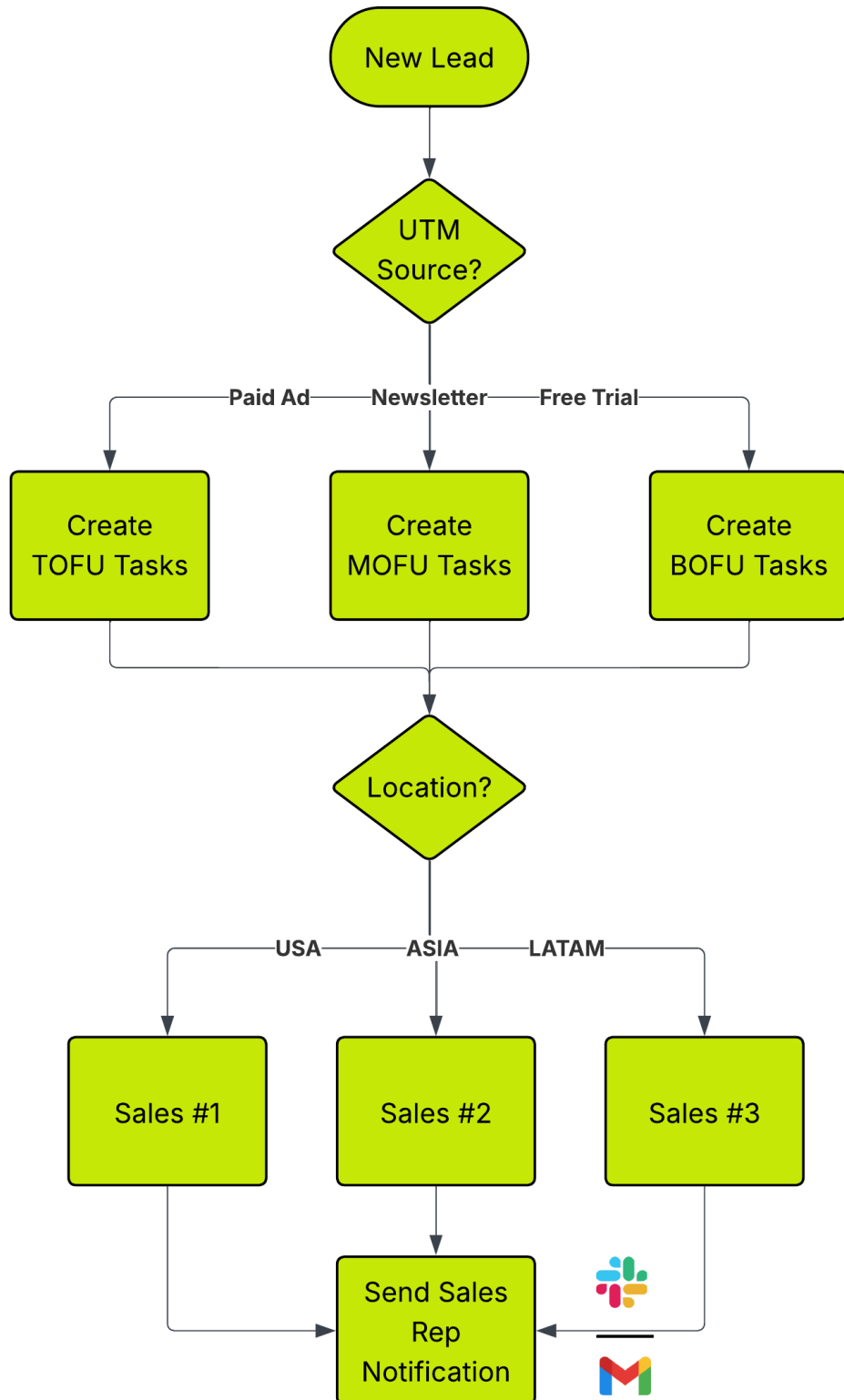
Send a re-booking email automatically when someone misses their demo.



# 9. Follow-Up Task Automation

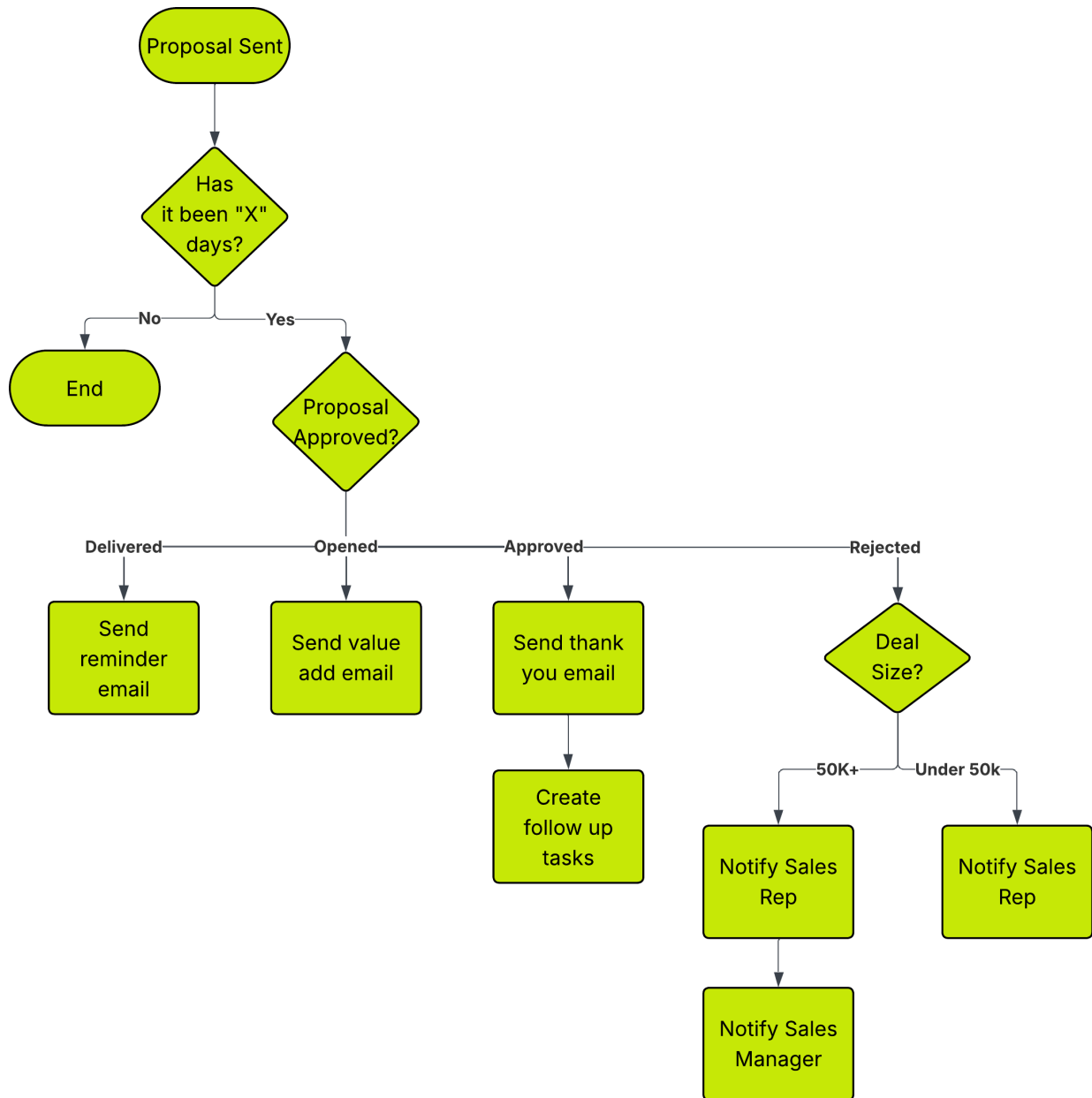
Revenue Pipeline

Create follow-up tasks for your reps when a lead takes a high-interest action.



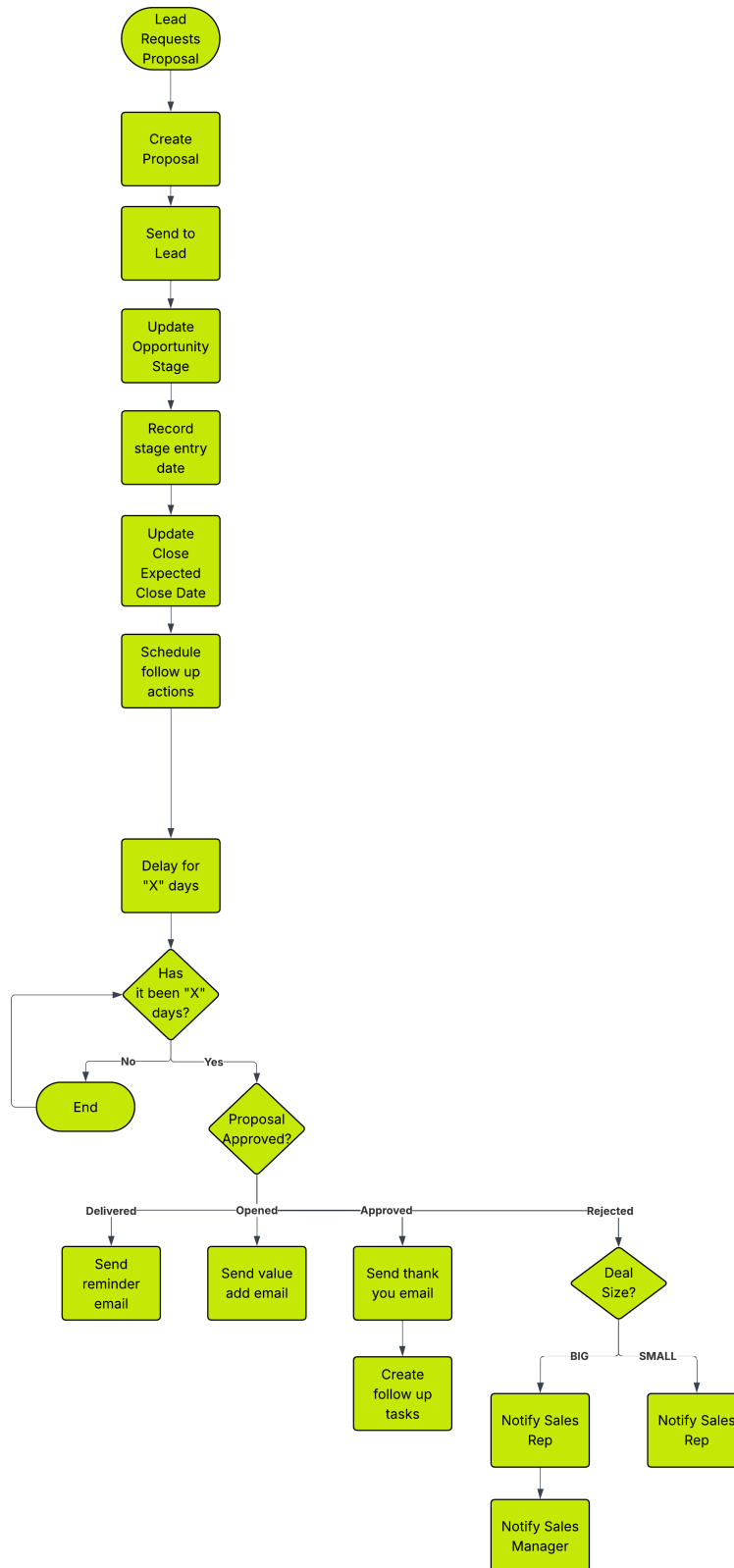
# 10. Proposal Follow-Up

Send reminders after a proposal is sent and notify your team of status changes.



# 11. Proposal to Signature

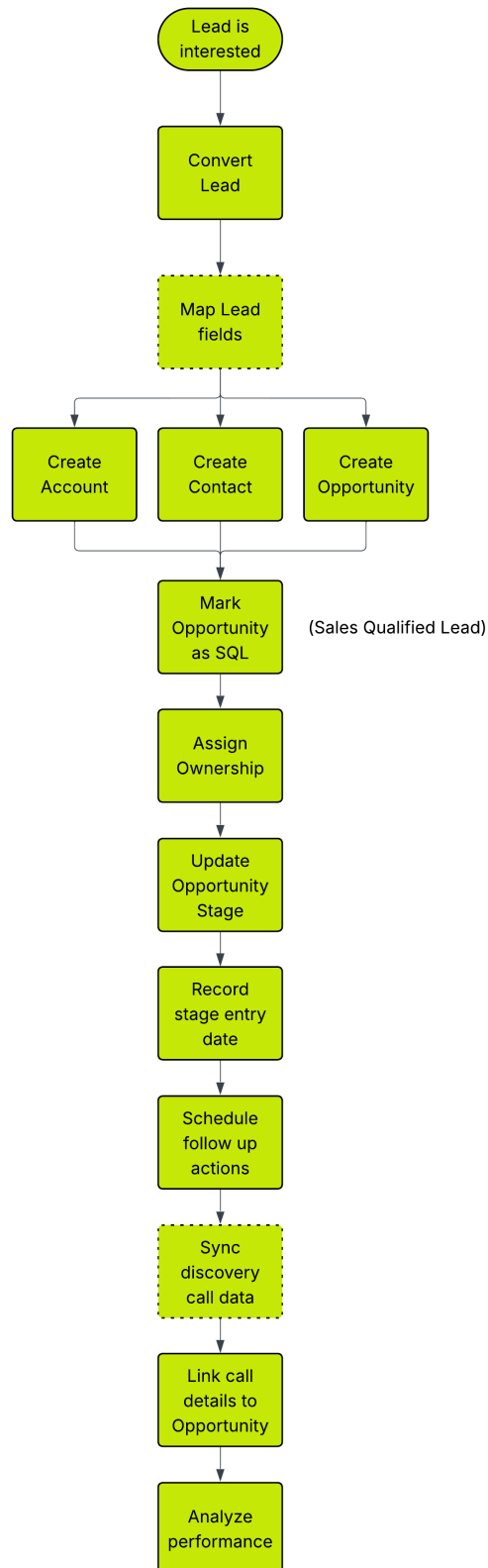
Track proposals from sent to signed and flag ones that take too long.



## 12. Lead to Discovery Opportunity

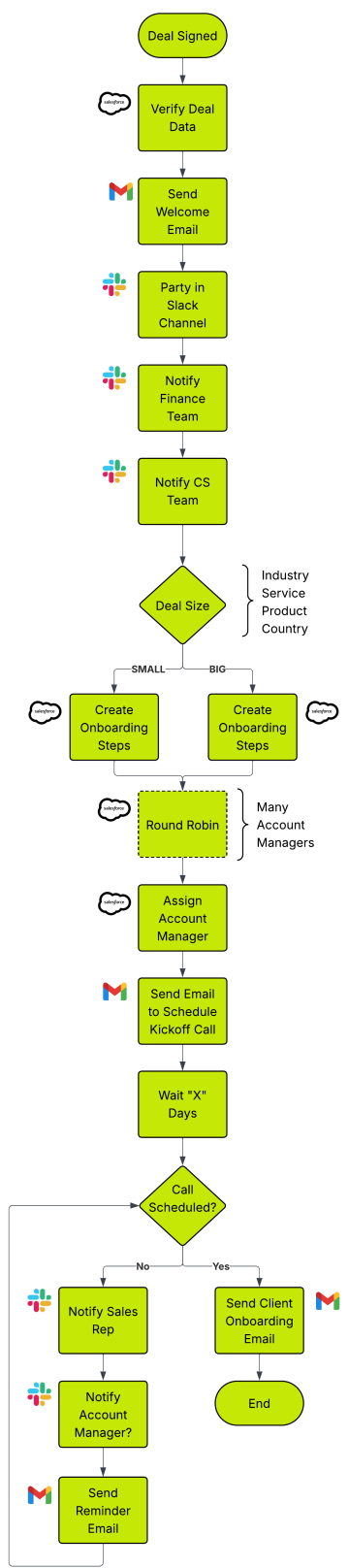
Revenue Pipeline

Move leads into your sales pipeline with automatic status and stage updates.



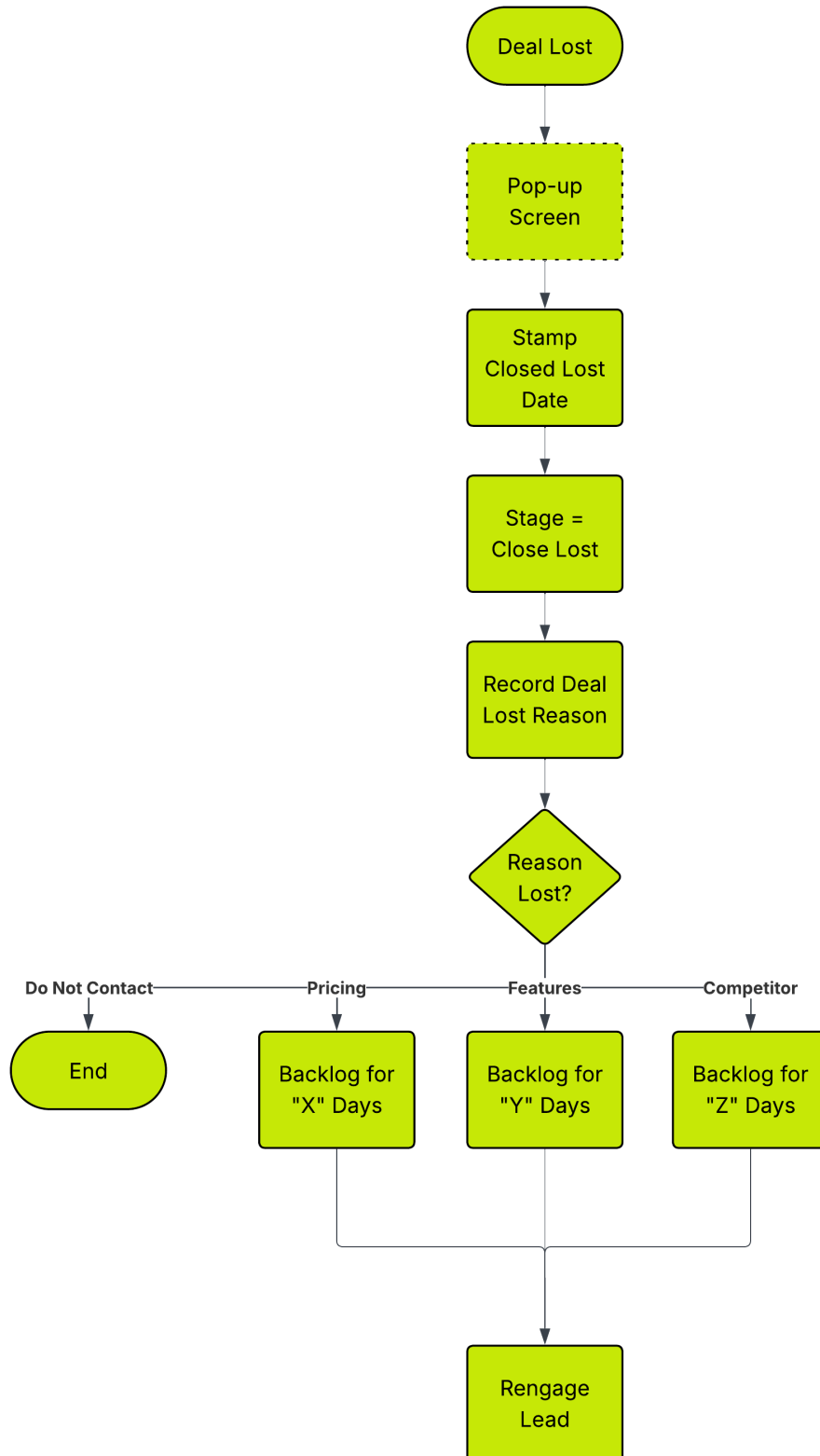
# 13. Closed Won Process

Kick off onboarding, notify your team, and sync records when a deal closes.



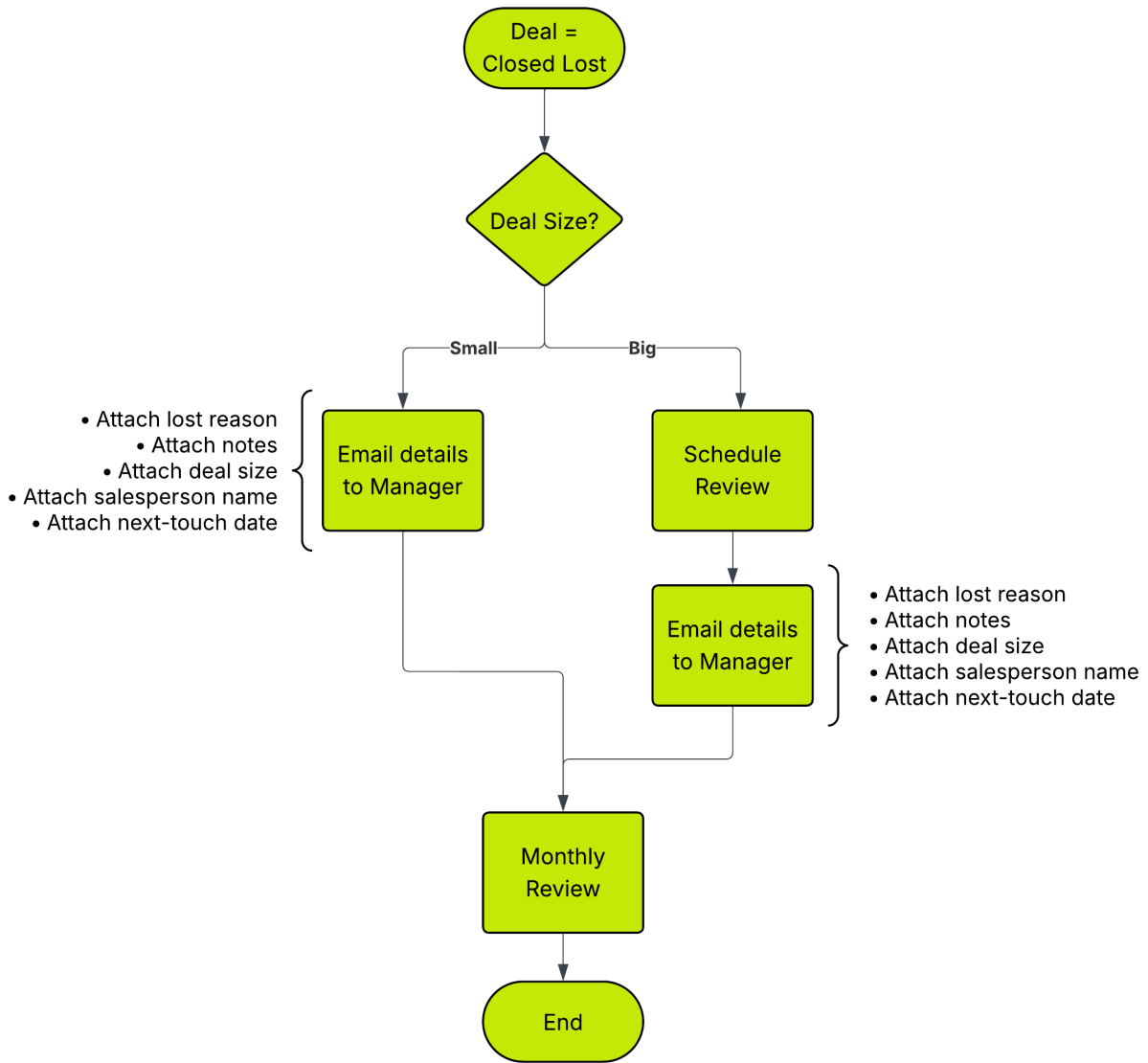
# 14. Closed Lost Process

Update records and organize lost deals so you can re-engage them later.



# 15. Closed Lost Review

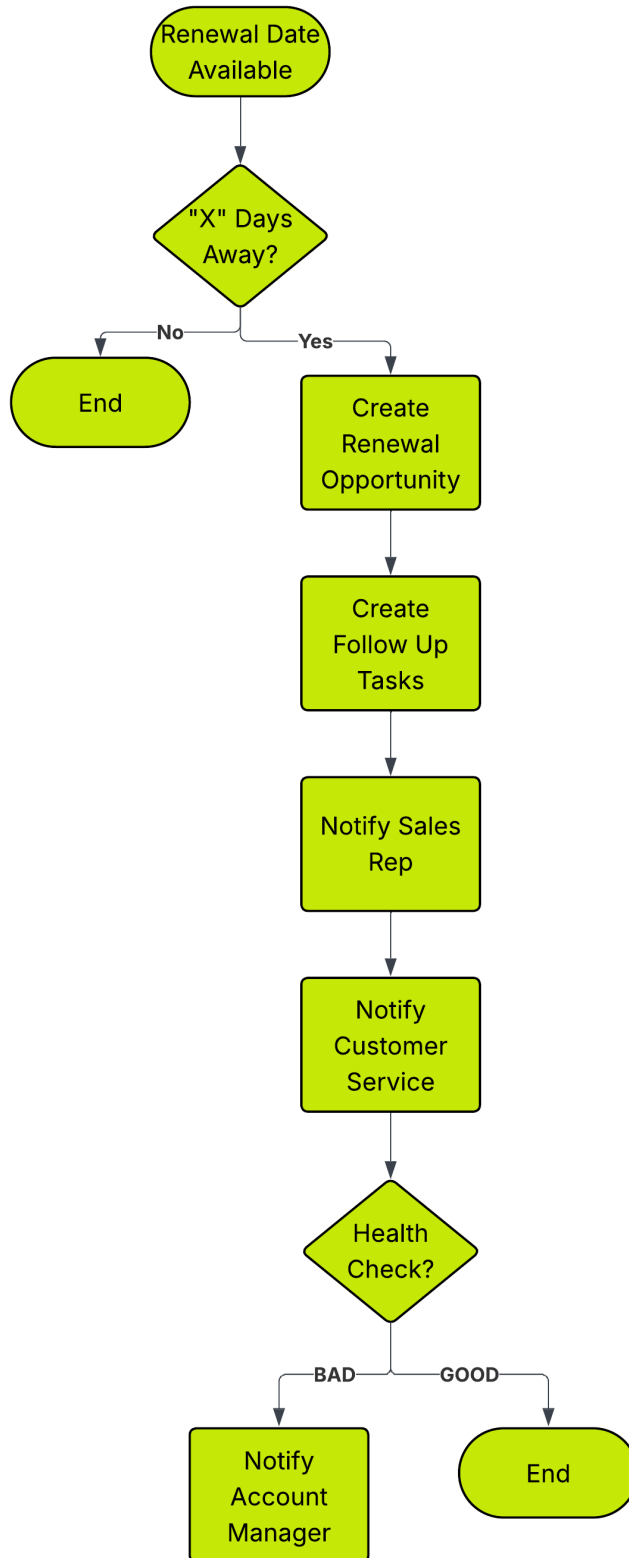
Collect feedback on why deals were lost and schedule review sessions.



# 16. Renewal Management

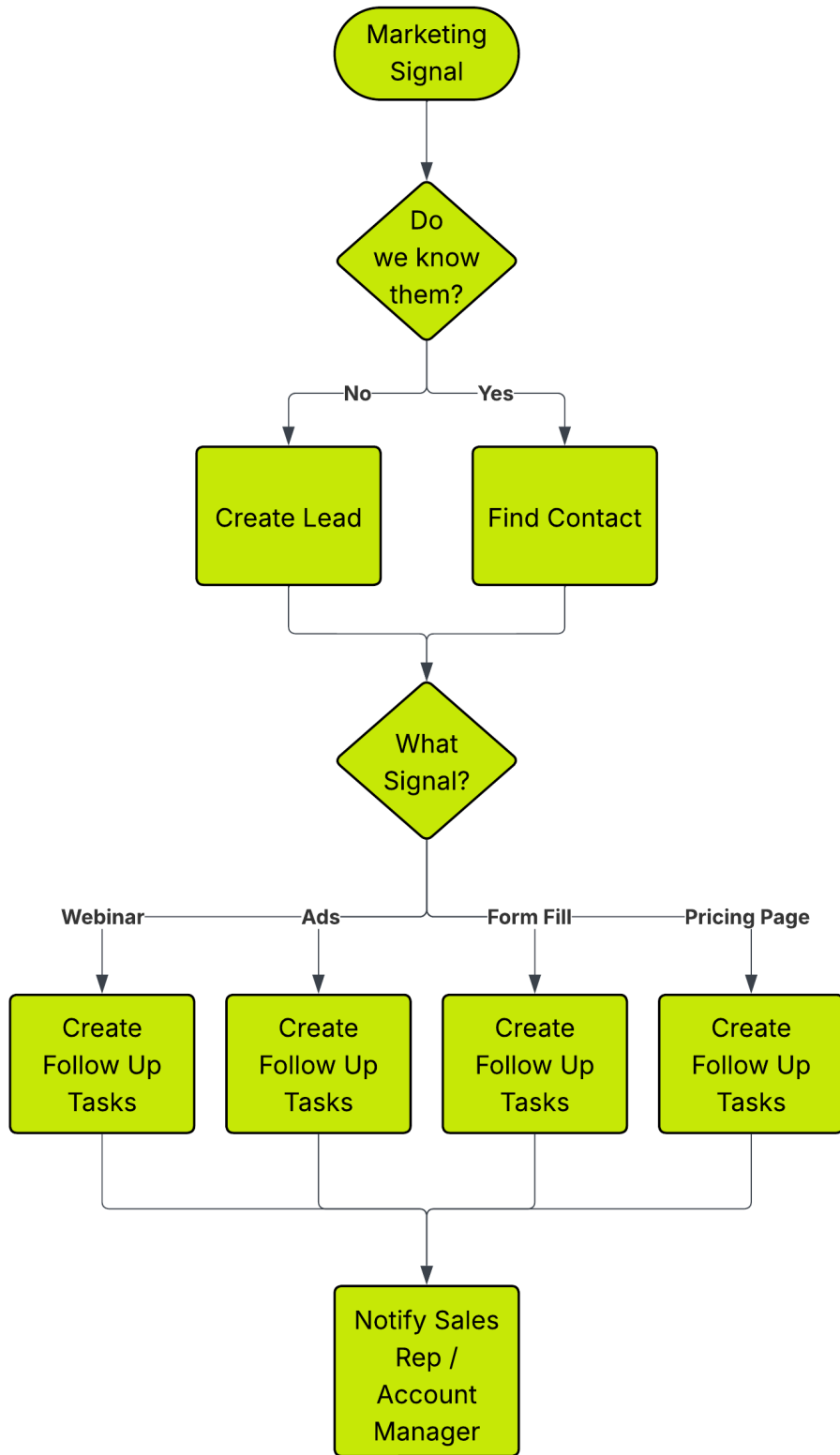
Revenue Pipeline

Track upcoming renewals and move them through a dedicated pipeline.



# 17. Upsell Management

Spot upsell opportunities based on customer behavior and assign follow-ups.



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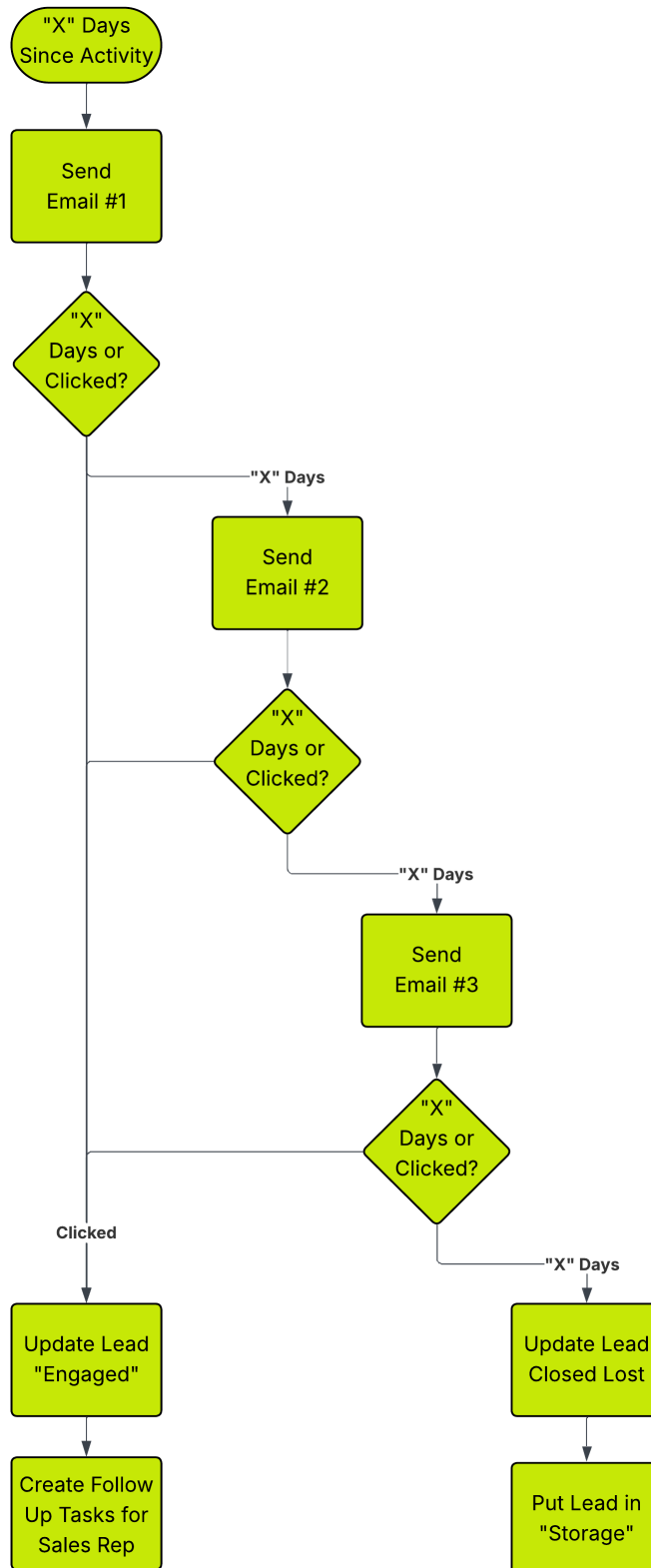
# Marketing & Demand Ops

9 automations

Nurture, scoring, events, and the marketing-to-sales handoff.

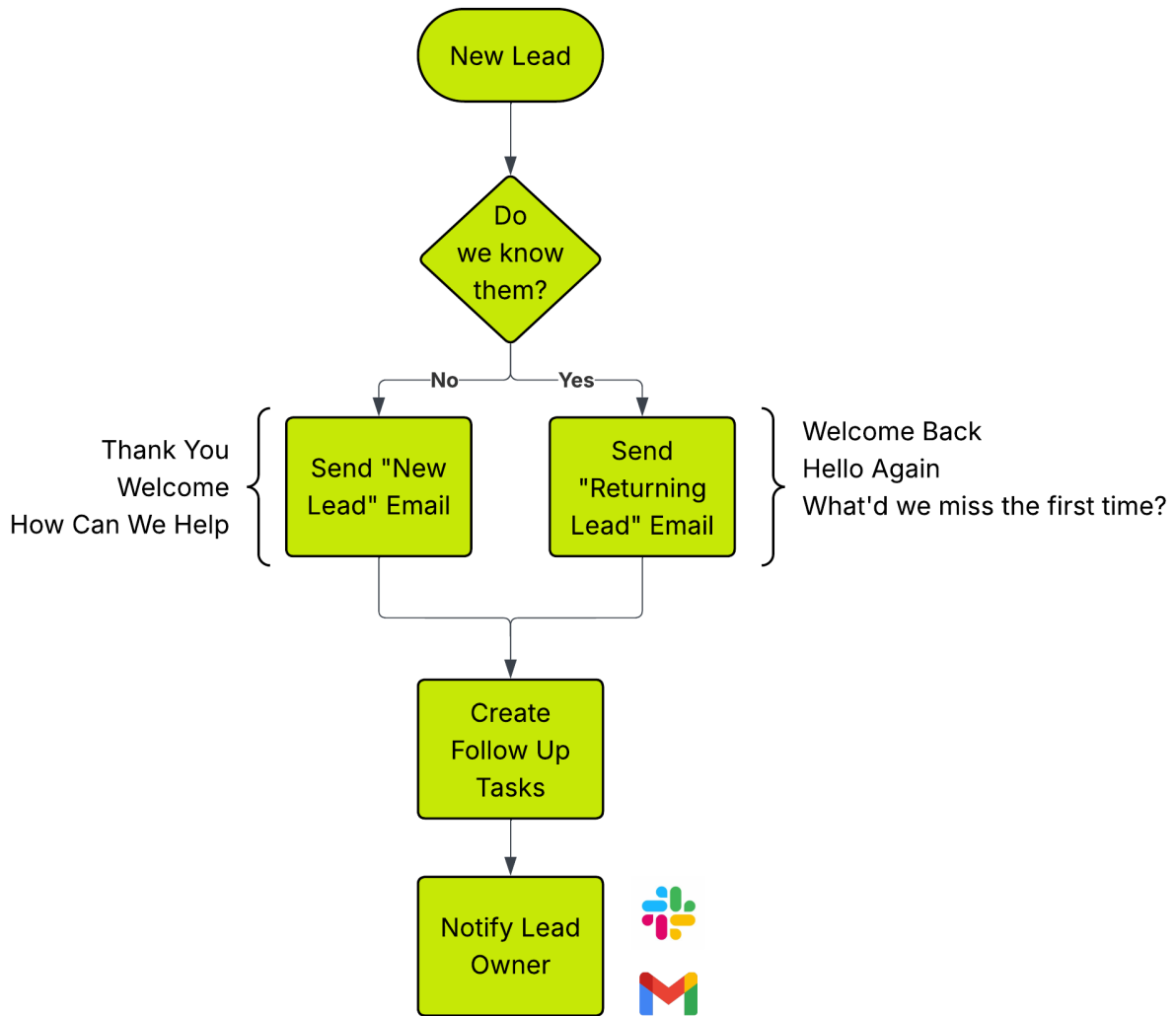
# 18. Lead Re-Engagement

Wake up cold leads with a timed email series that adapts to their responses.



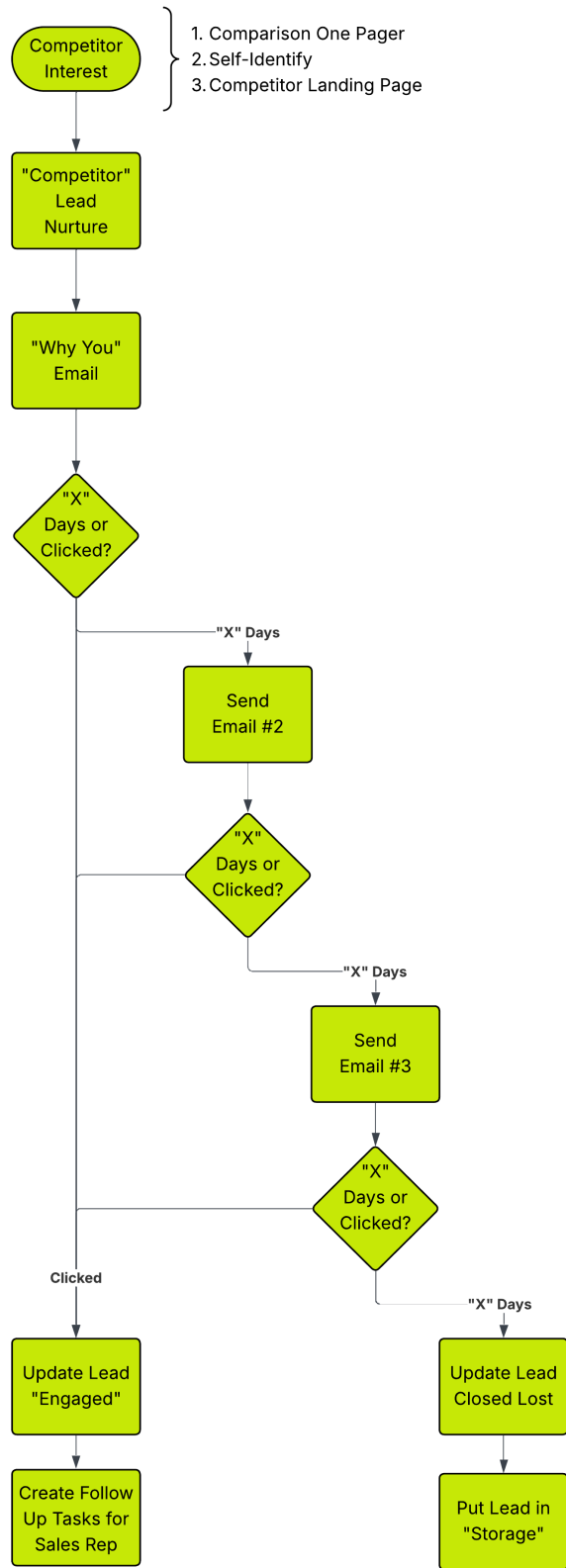
# 19. Lead Auto-Responder

Send an instant reply to new leads the moment they come in.



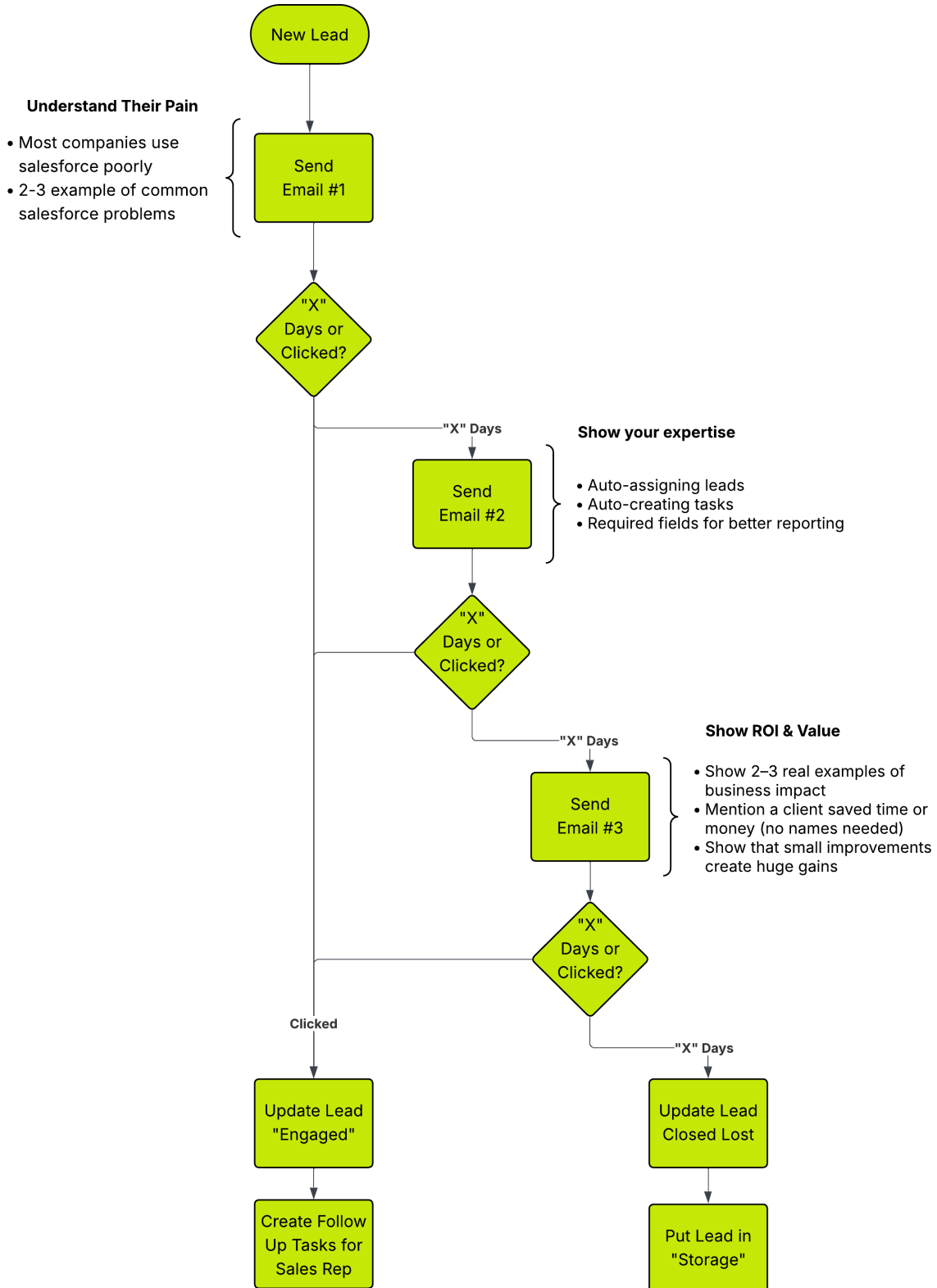
# 20. Competitor Lead Nurture

Reach out to leads interested in competitors with a targeted email campaign.



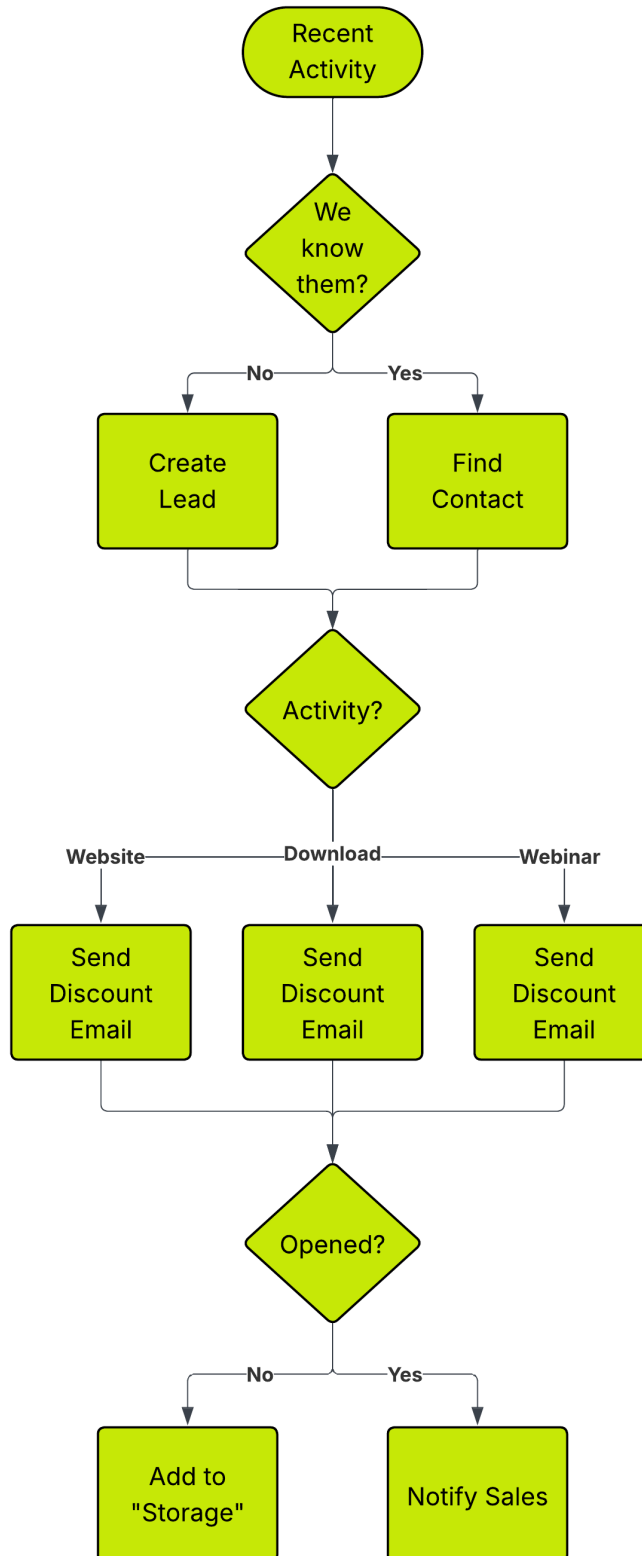
# 21. Lead Nurture Sequence

Warm up cold leads over time with a series of emails that build trust.



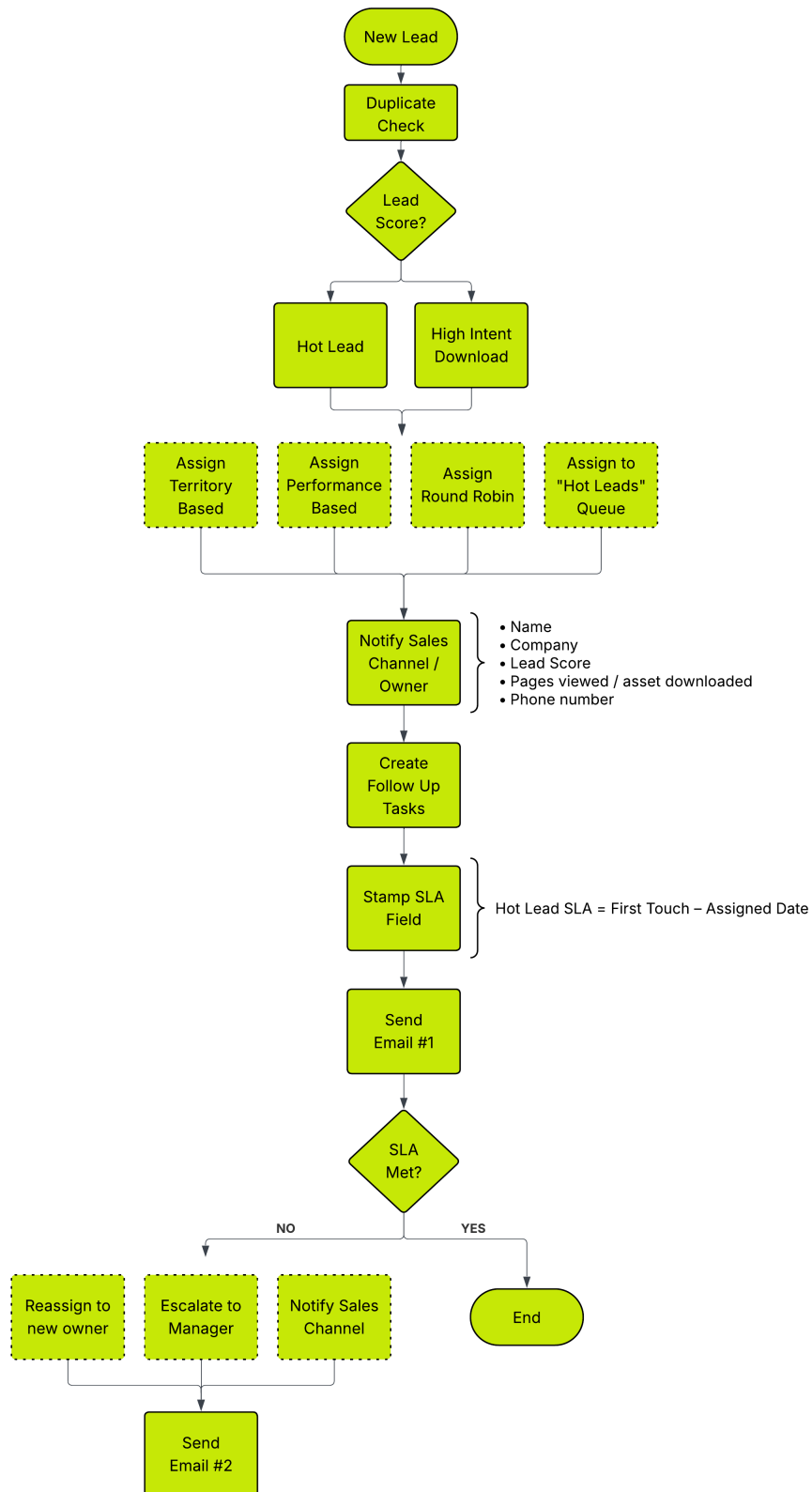
## 22. Discount Offer Campaigns

Send targeted offers to the right audience and track who engages.



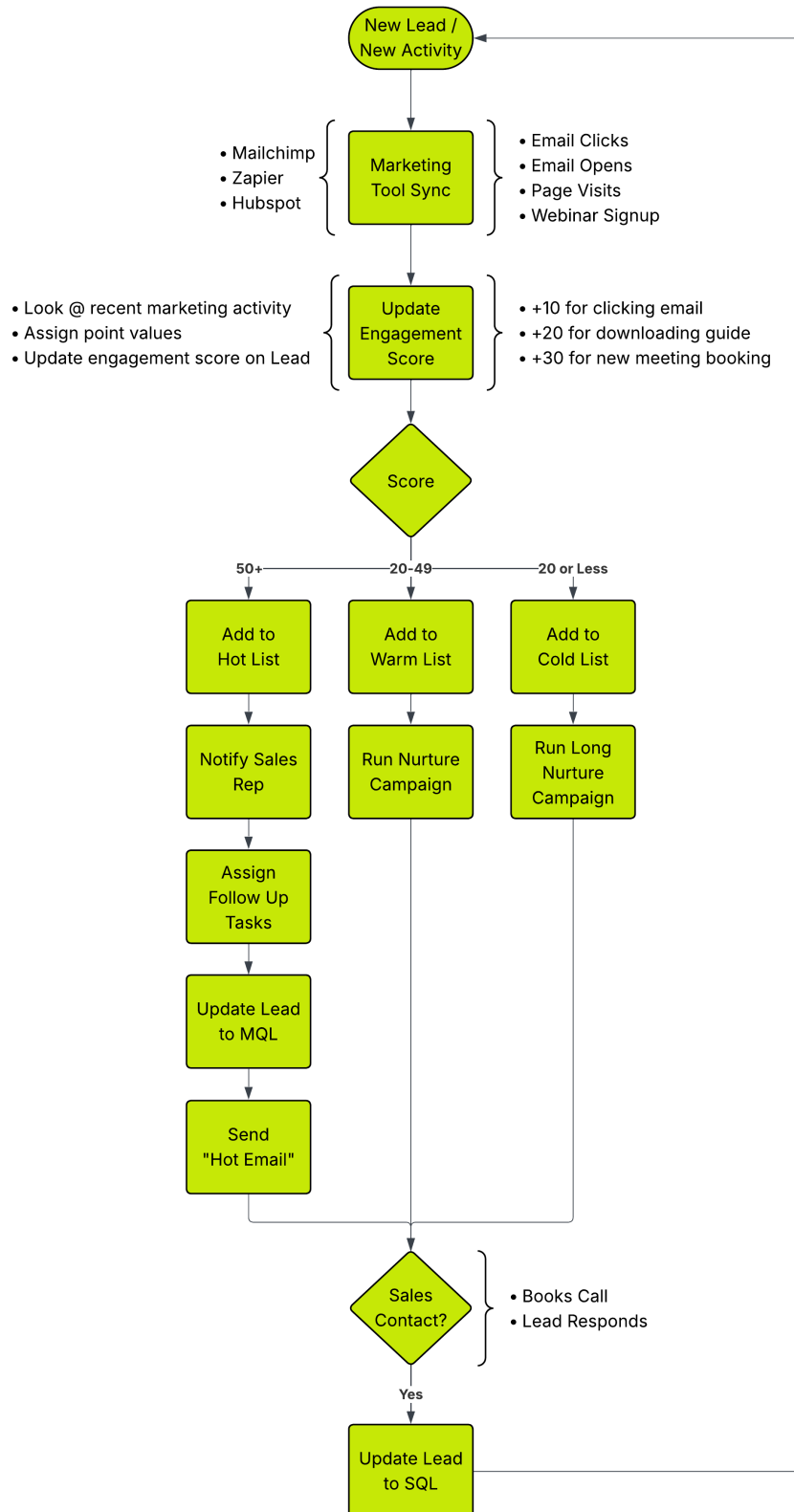
# 23. Hot Lead Management

Flag your hottest leads and get them to sales instantly with full context.



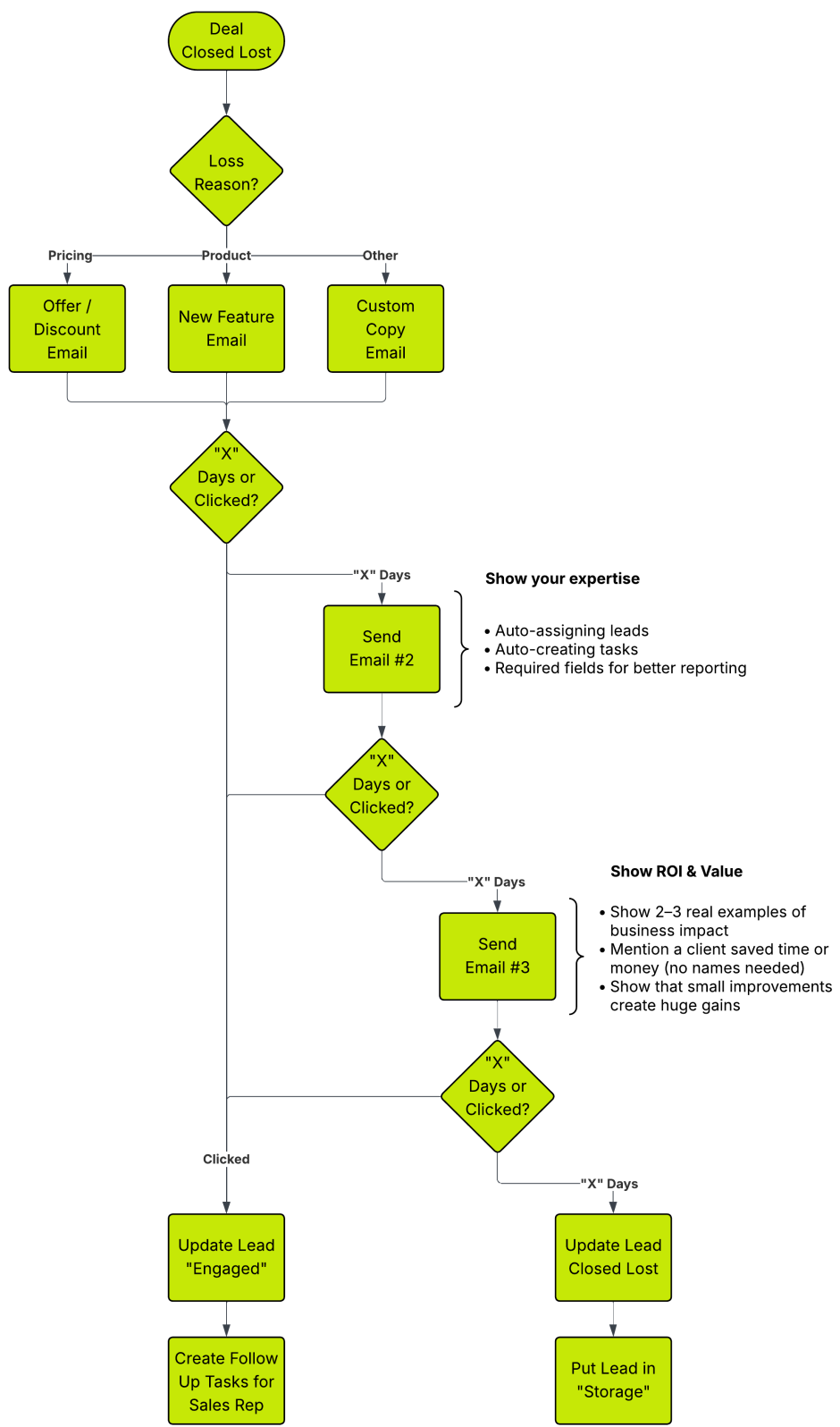
# 24. Marketing Engagement Score

Sort leads by how engaged they are and follow up based on their score.



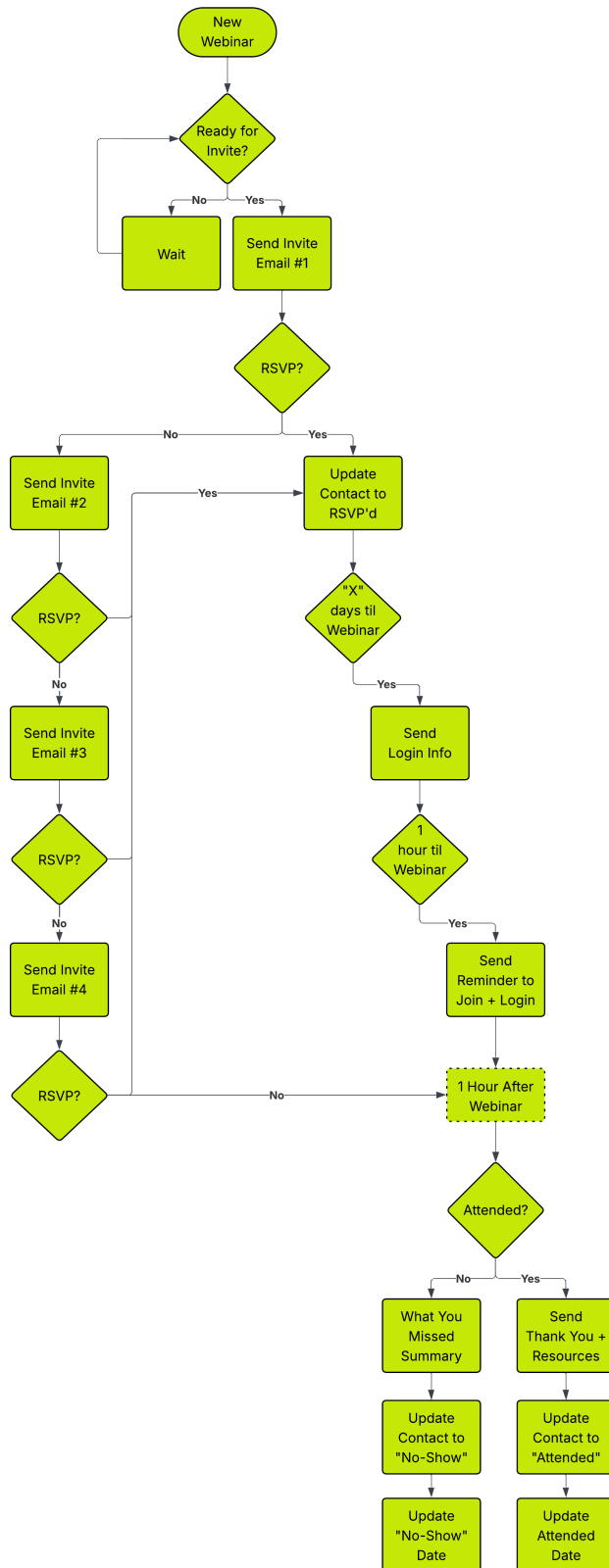
# 25. Win-Back Campaigns

Re-engage lost deals with emails tailored to why they said no.



# 26. Webinar Event Management

Handle the full webinar process from invite to follow-up automatically.



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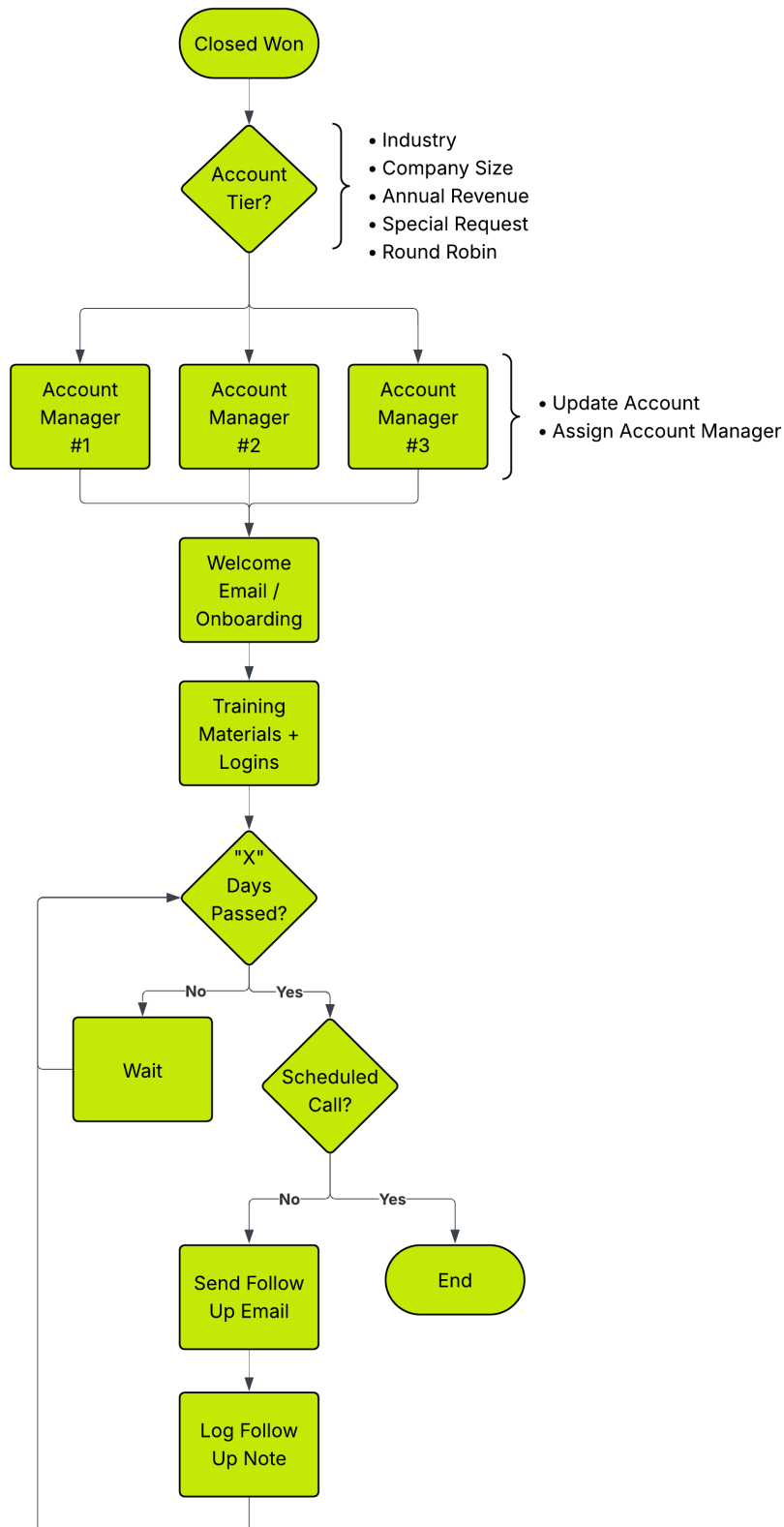
# Customer Success & Support

10 automations

Onboarding, health scores, surveys, and retention workflows.

# 27. New Client Onboarding

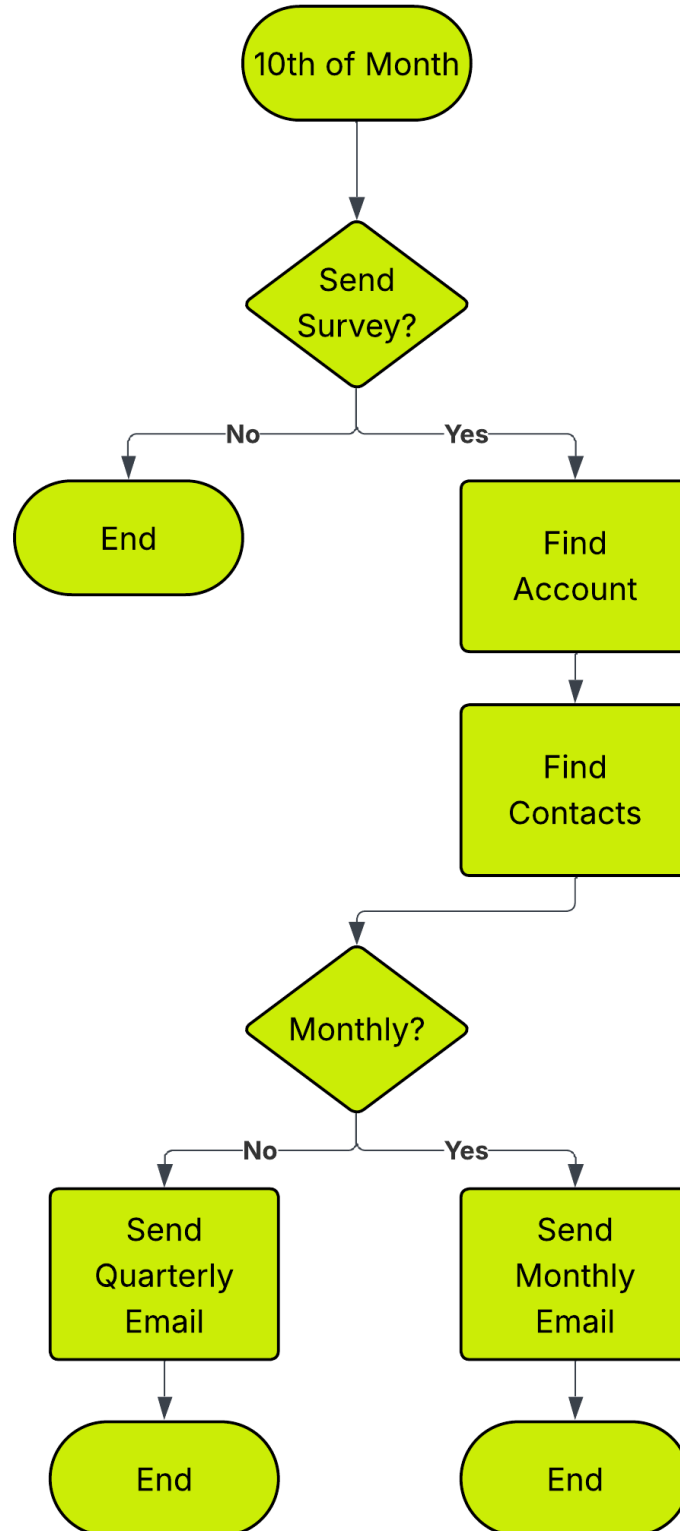
Start a structured welcome sequence the moment a new client signs on.



## 28. CSAT Surveys

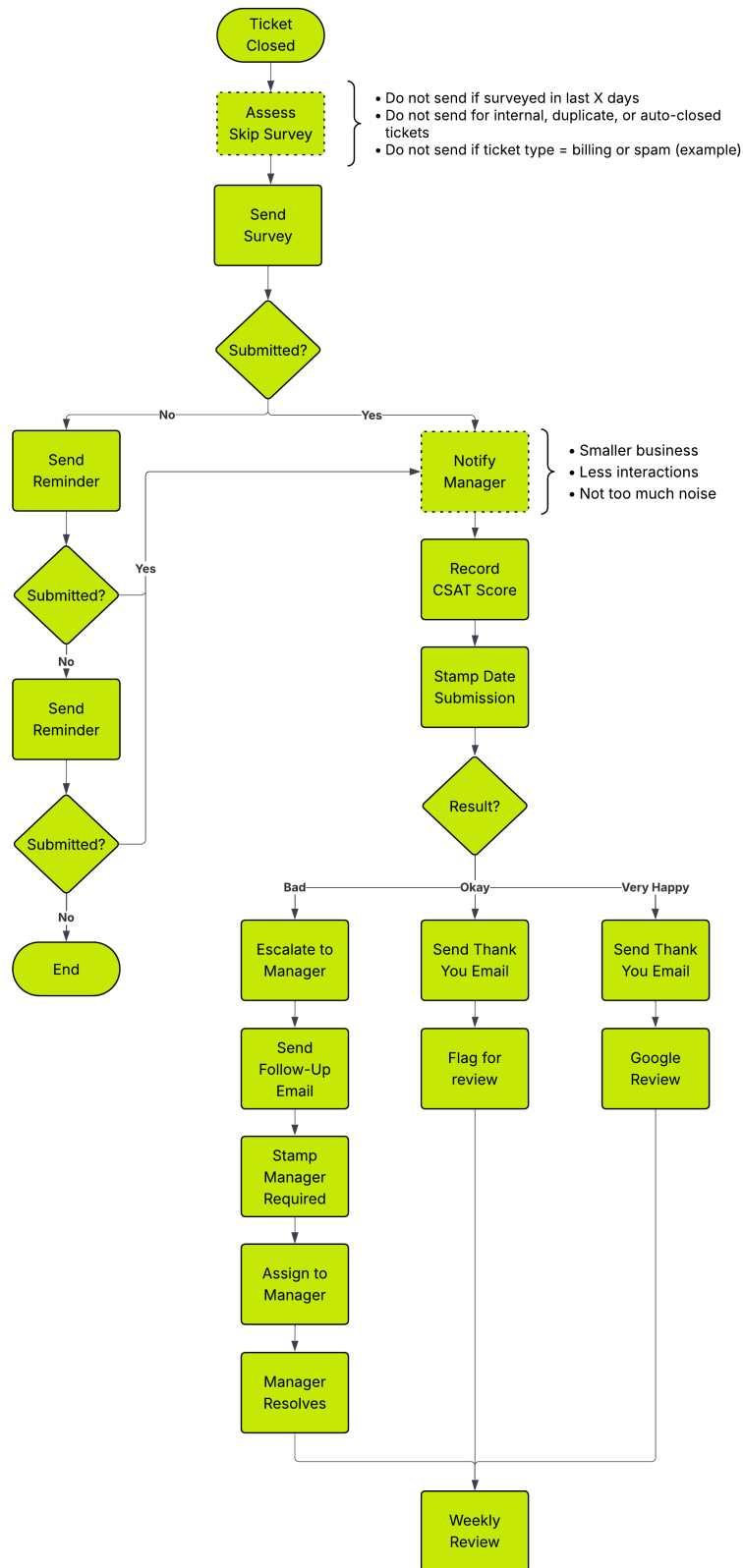
Customer Success & Support

Send satisfaction surveys after the sale and route feedback to the right team.



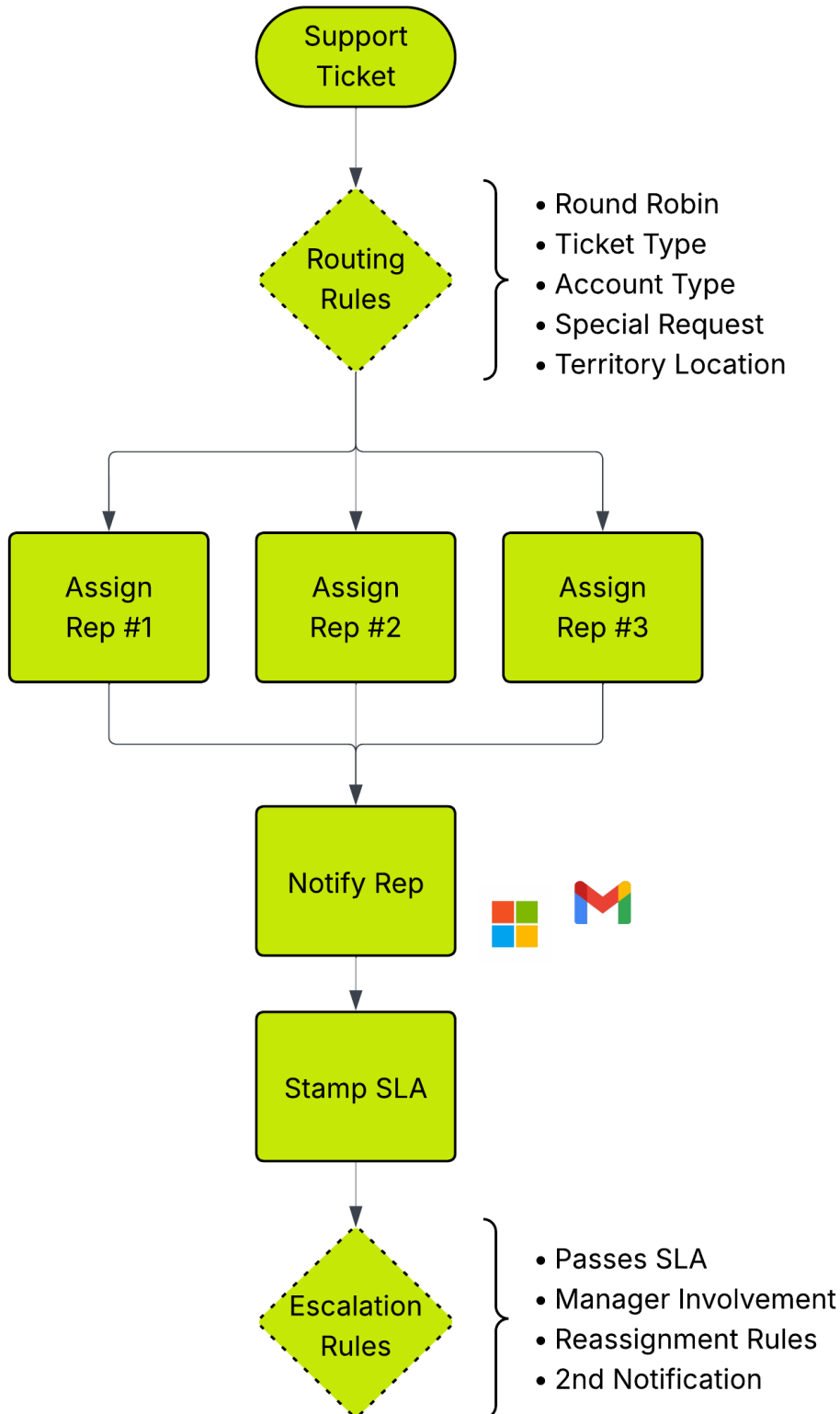
# 29. Support Satisfaction Surveys

Ask customers how support went and route good or bad feedback accordingly.



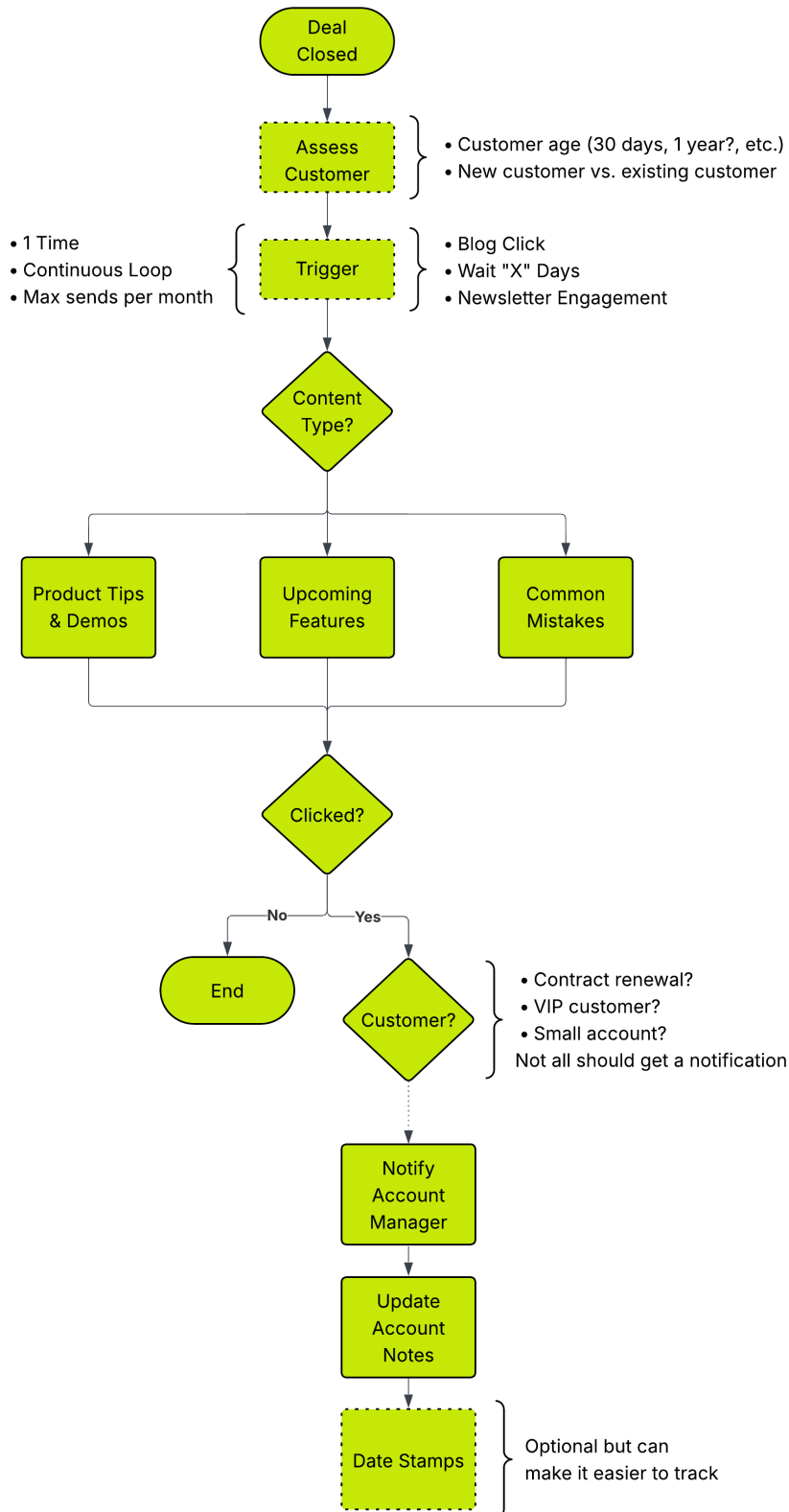
# 30. Support Ticket Routing

Send new support tickets to the right team based on the issue type.



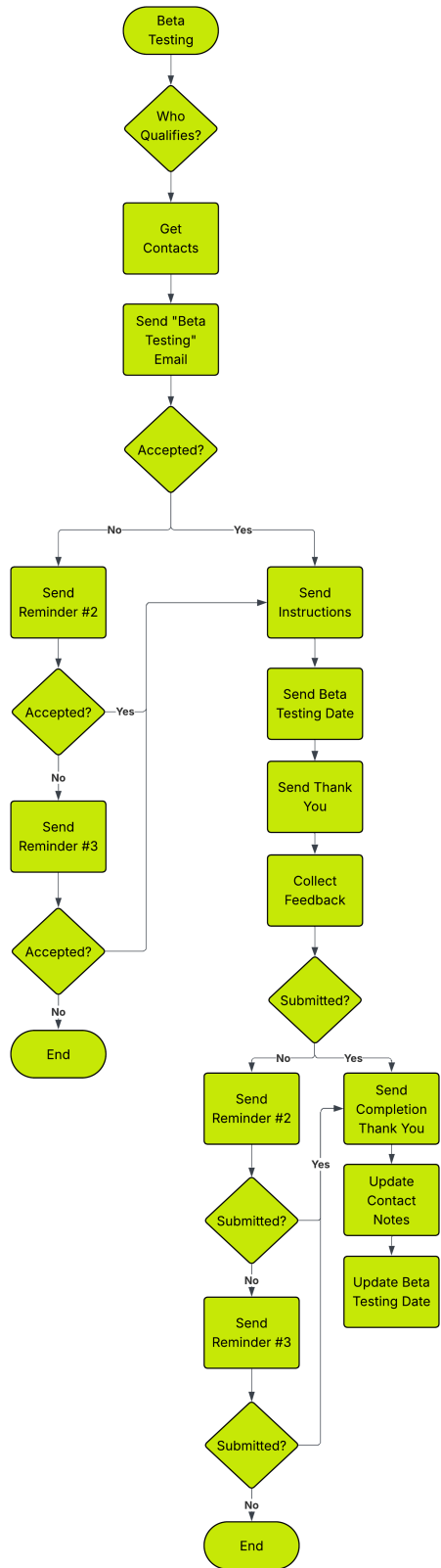
# 31. Educational Content Delivery

Send helpful product tips matched to how much each customer uses your tool.



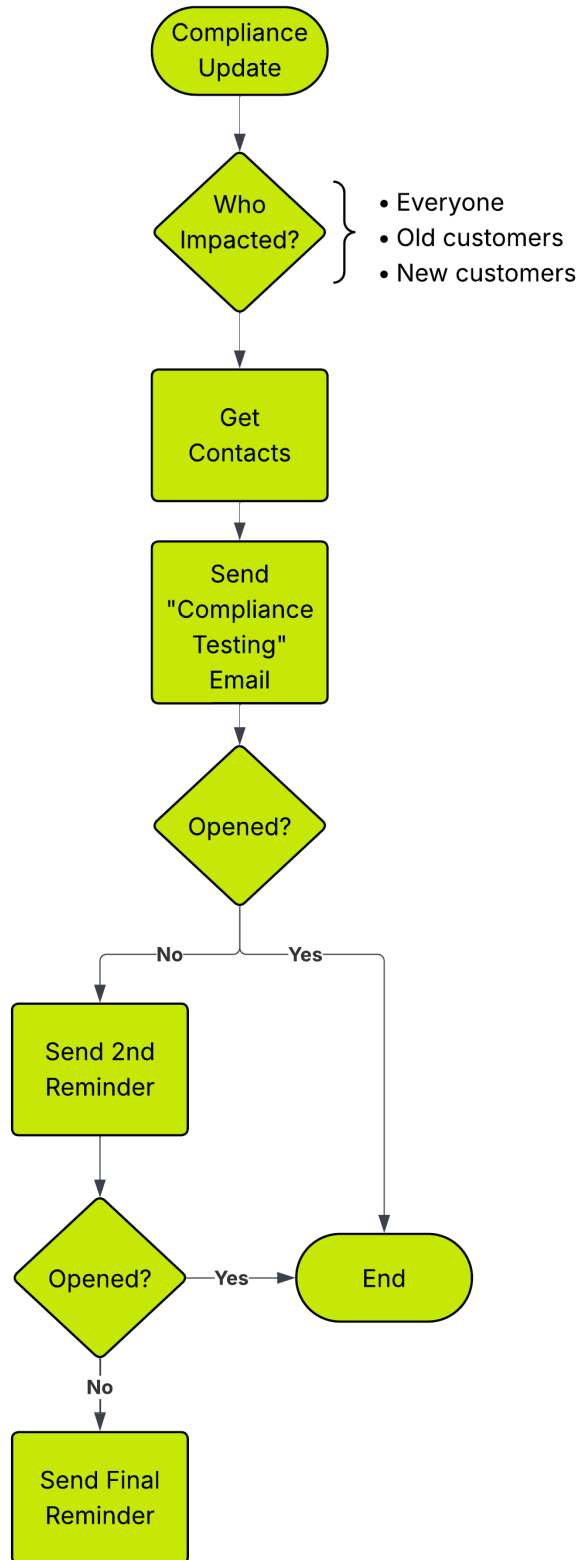
# 32. Beta Testing Management

Recruit testers from your best customers, give access, and collect feedback.



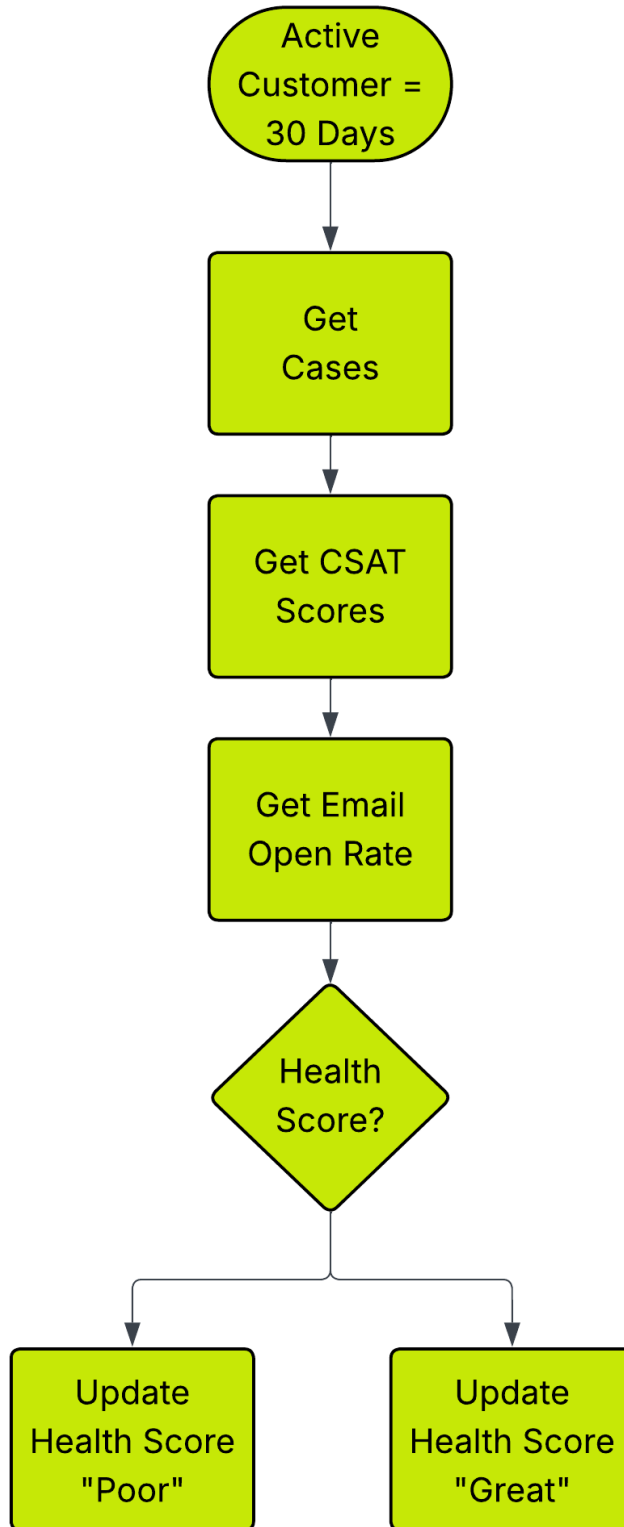
# 33. Compliance Updates

Notify customers about compliance changes and track who has responded.



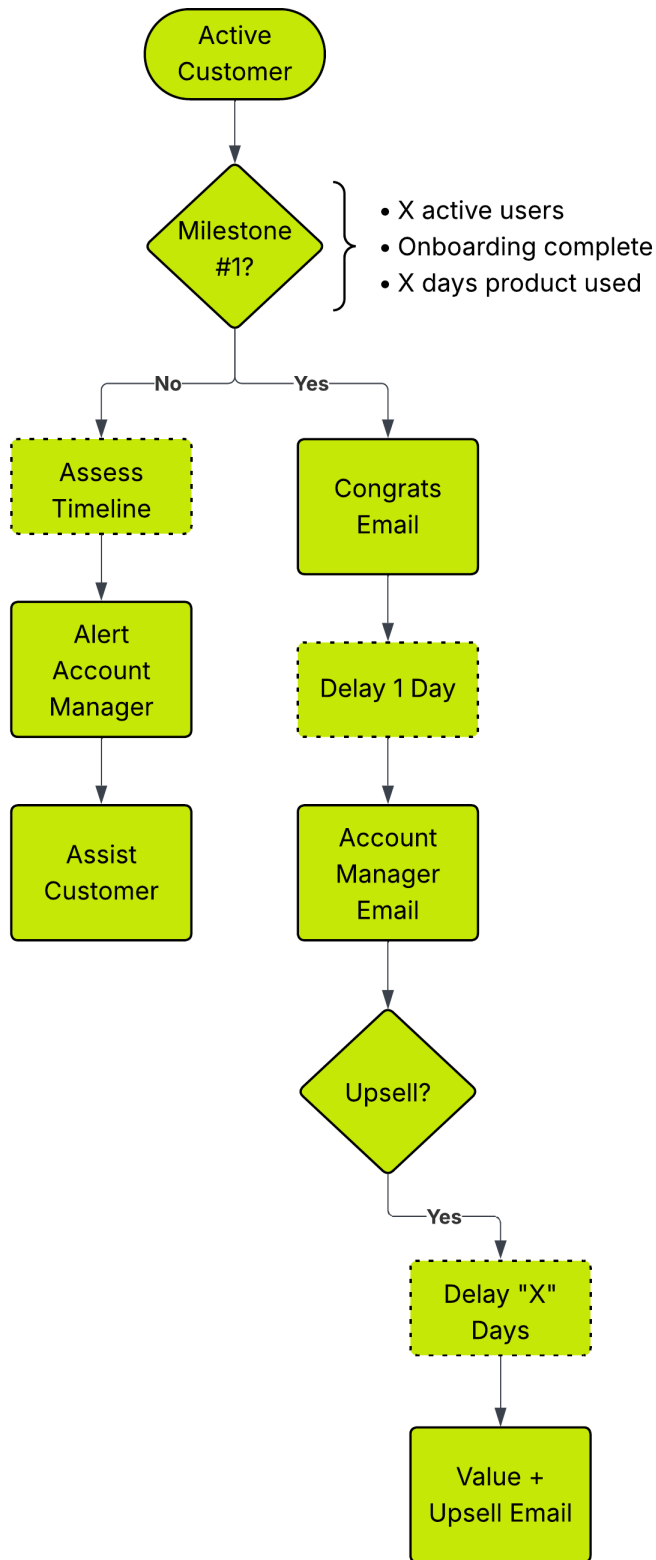
## 34. Account Health Score

Monitor account health and flag at-risk customers before they churn.



# 35. Milestone Celebrations

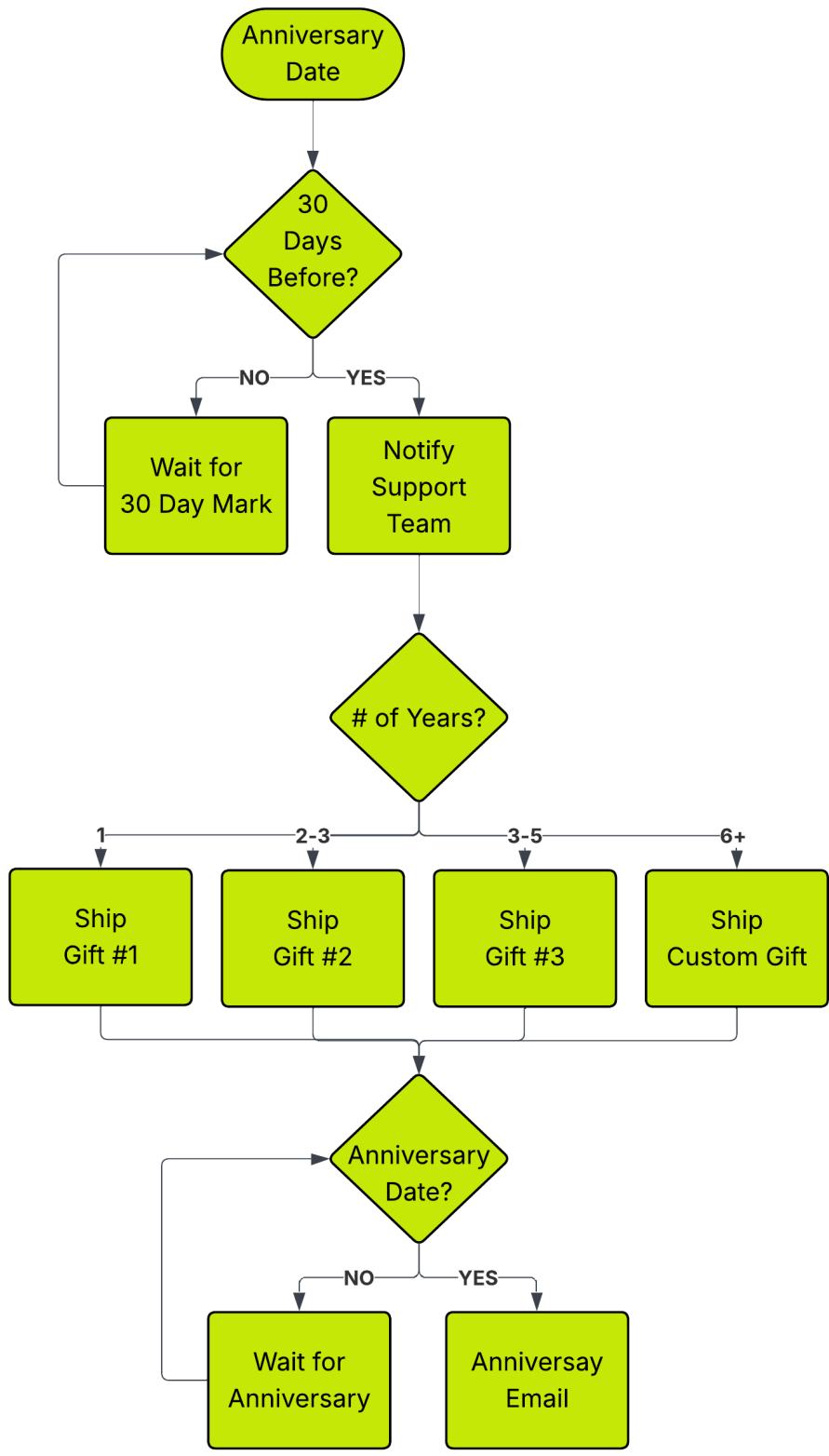
Celebrate when customers hit product milestones with a personalized message.



# 36. Anniversary Celebrations

Customer Success & Support

Send a thank-you message to customers on their yearly signup anniversary.



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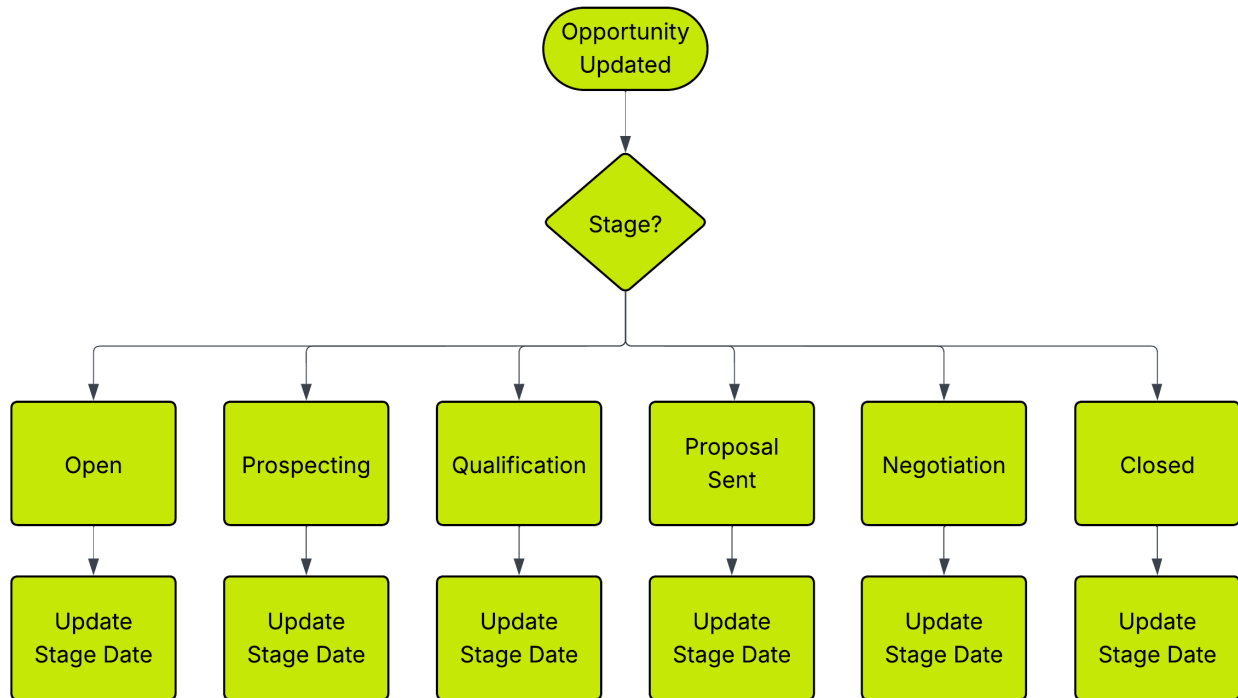
# RevOps & Data Integrity

6 automations

Date stamps, record hygiene, and internal team processes.

# 37. Opportunity Stage Date Stamps

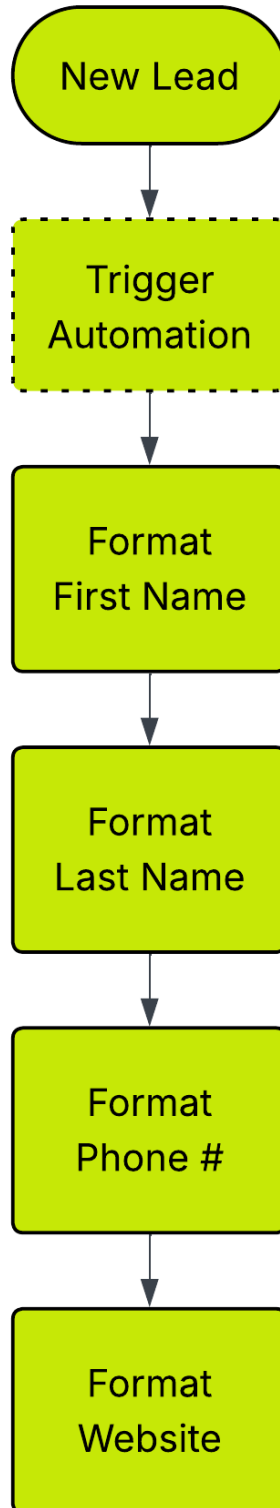
Track exactly when deals move between stages so you can spot bottlenecks.



## 38. Record Formatting

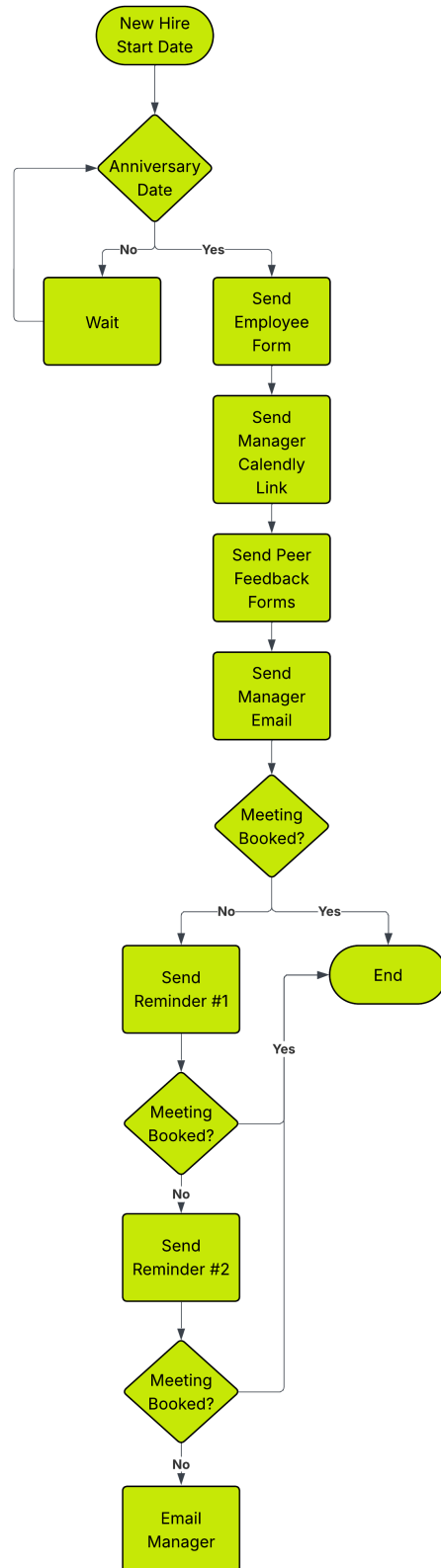
RevOps & Data Integrity

Clean up names and formatting on new records automatically.



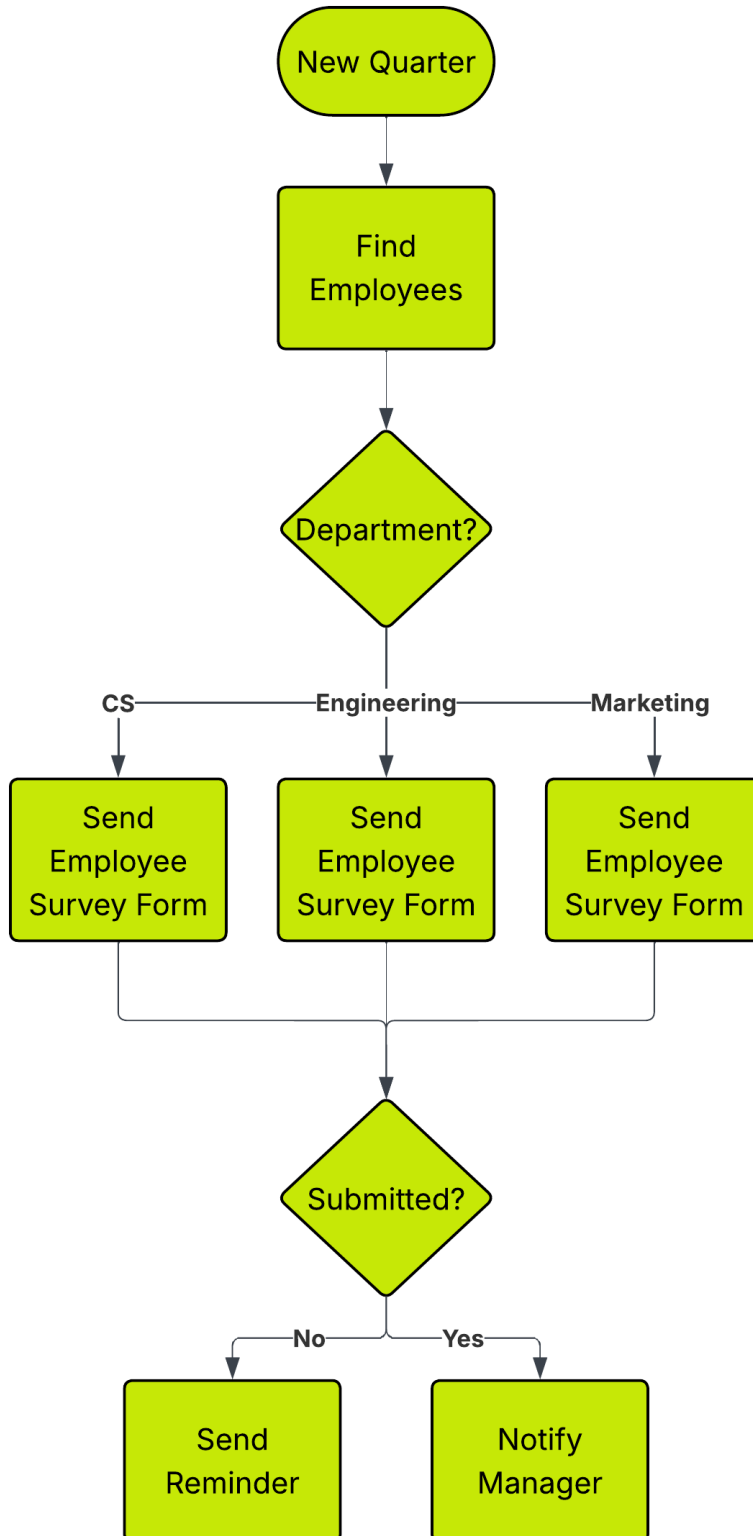
# 39. Employee Annual Reviews

Automate the review cycle from self-assessments to manager scheduling.



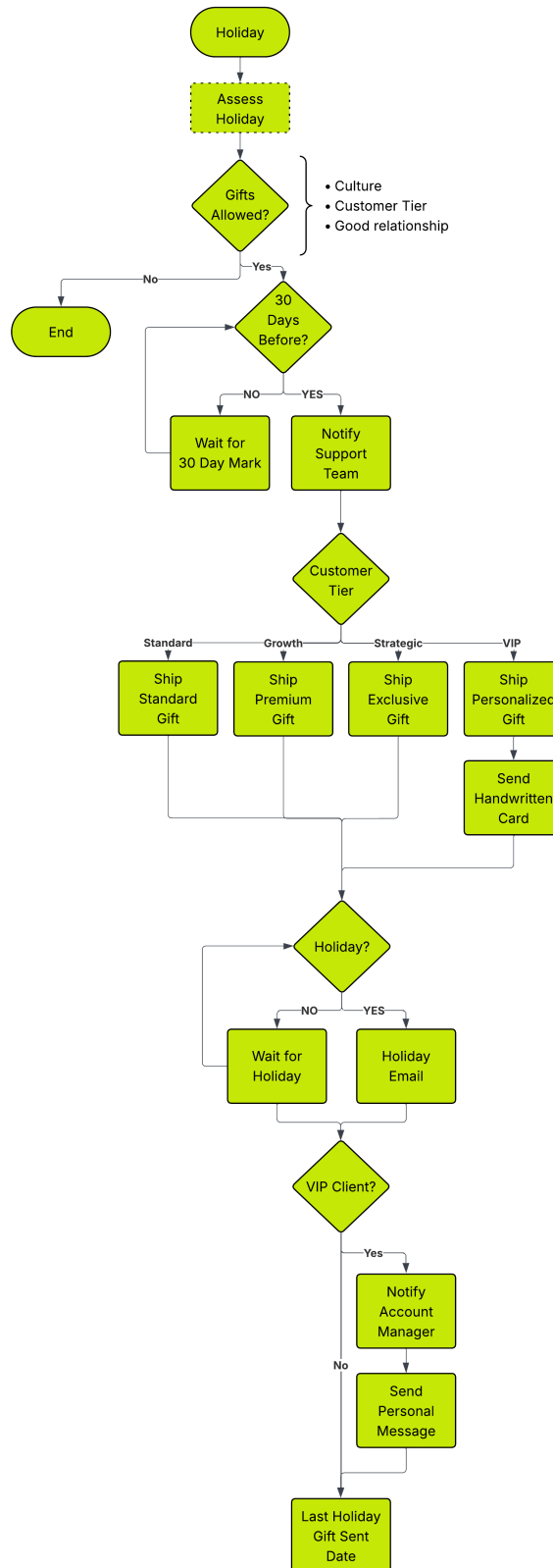
# 40. Employee Satisfaction Surveys

Send satisfaction surveys to your team and route results to managers.



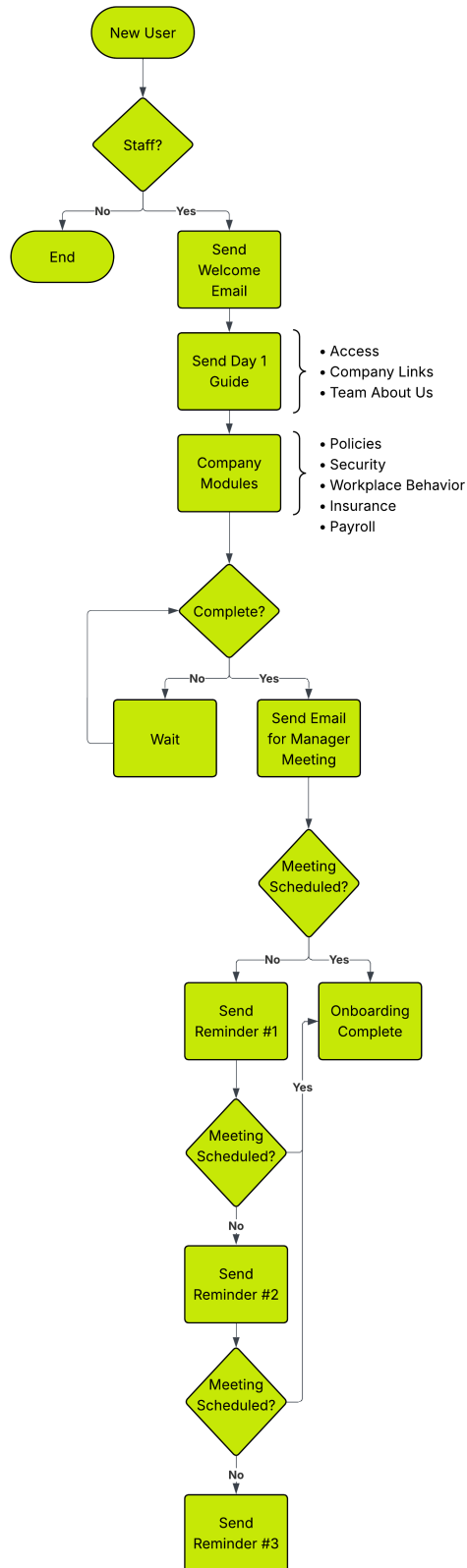
# 41. Holiday & Birthday Celebrations

Send celebration messages to team members for birthdays and milestones.



# 42. Staff Onboarding

Walk new hires through onboarding with a timed series of emails and tasks.





# Who is Simply Scale?

You were hired to drive strategy. To optimize revenue operations. To make the business run smarter. But somewhere along the way, you became the accidental Salesforce admin — buried in flow configs, field mapping, and broken automations instead of the work that actually moves the needle.

**Simply Scale is the Salesforce consulting partner built for B2B tech companies scaling from \$3M to \$100M in ARR.**

We take the Salesforce work off your plate so you can get back to strategy.

## Built exclusively for B2B tech

We only work with tech companies in your stage and size. We the know playbook.

## Strategy + execution

Not just admin work. We architect systems that scale with your revenue engine.

## Proven with high-growth teams

We've built Salesforce for 4 unicorn-stage tech companies. We and know what scales what doesn't.

## Ongoing partnership

Not a one-and-done project. Continuous support as your evolves. Salesforce

## Fast, flexible delivery

We move at startup speed. No 6-month SOWs. Scale up or down as you need.



*Simply Scale has been incredible to work with - they have played a major role in building the foundations of our Salesforce GTM engine, both on the Marketing and CS sides, and the impact they have made has been significant. Their Salesforce experience runs deep and their knowledgeable, patient, and communicative style has enabled us to move fast with high quality.*



**Carol Jiang**

VP of Operations, Overjet

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