Automated Lead Follow Up Campaign

Please Note! We recommend using the online Strategy Guide to source your campaigns. The Strategy Guide is kept up-to-date with the latest campaigns. This campaign may contain legacy content (e.g, legacy emails, legacy landing pages, etc...)

This article provides instructions for launching the Automated Lead Follow-Up campaign that you can download for free from the Infusionsoft Marketplace.

This campaign is triggered when a new lead fills out the contact request web form, which creates a follow up task. The new lead is then automatically nurtured via email until the follow up task is marked as completed.

1. Download the Automated Lead Follow-Up campaign from the Marketplace

2. Assign an Owner and Configure Task to Call

   The only thing to configure for this campaign is who will be tasked with calling a new lead.

   1. Double click on the Task to Call & New Lead Nurturing sequence.
   2. Double click on the Assign to Rep owner step.
   3. Select the user that will contact the new lead via the dropdown and click on the green Save button.
   4. Double click on the New Lead Call task.
   5. Select the same user from the Assign to (backup) dropdown as did in the previous steps.
   6. In the upper right of the page, click Draft to change the task to the Ready status.
   7. Click on Back to Sequence in the upper left of the page.
   8. In the upper right of the page, click Draft to mark the sequence itself as Ready!
   9. Click Back to Campaign in the upper left of the page.

3. Publish the Campaign

   All items on this campaign by now should look light green/greyed out (like the Task to Contact Completed goal). This means we can safely Publish.

    1. Click the blue Publish button in the upper right; this will display a list of all items to be published.
    2. Click the green Publish button at the bottom of this list to publish the campaign.

4. Put Request Form on Your Site

   Your request form is now is ready to go! You just need to grab the form's web code and put it on your site.