Sales Process Automation Cheat Sheet

by ⋽ Flowla

Use this cheat sheet to quickly identify automation opportunities, build workflows, and boost efficiency without sacrificing personalization.

Why automate?

- Save time by automating routine tasks like follow-ups and lead scoring.
- Reduce human errors by ensuring consistent workflows and data handling.
- Scale without hiring by automating playbooks to support team growth.
- Close deals faster by keeping deals moving with automated reminders and tasks.

Key sales pocesses to automate

Lead scoring & qualification

Example: Use CRM triggers to auto-prioritize hot leads based on behavior and demographic data.

Email follow-ups & nurturing

Example: Automate follow-ups after demos or trials to keep deals moving forward.

Appointment scheduling

Example: Use tools like Calendly to auto-book meetings with prospects and sync calendars.

Proposal & contract generation

Example: Auto-generate personalized proposals when deals reach the negotiation stage.
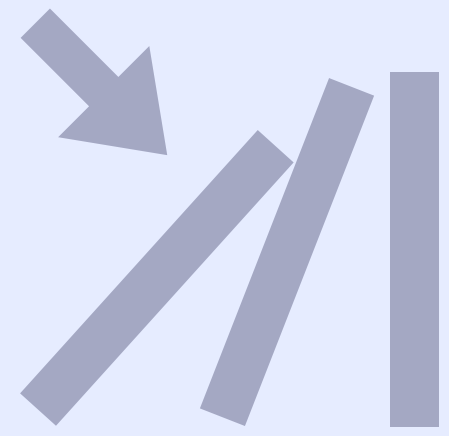
Customer onboarding

Example: Trigger onboarding flows immediately when deals are marked "Closed Won."

Automation workflow templates to implement

01 Lead scoring & qualification workflow

Trigger: Instead of overwhelming buyers with data, create a vivid image that resonates emotionally.

1. Automatically assign a lead score based on behaviour (e.g., website visits, downloads).
2. If the score exceeds a threshold (e.g., 80), notify the assigned sales rep on Slack.
3. If the score is low, place the lead in a nurture sequence (automated emails over two weeks).

Example: Lead viewed 3 blog posts ➔ Score = 85 ➔ Assign to rep.

02 Inactive deal re-engagement worfklow

Trigger: No activity on a deal for 14 days.

1. Automatically send a "Just checking in" email to the buyer.
2. Create a task in the CRM for the sales rep to follow up if there is no response after three days.
3. If the buyer engages with the email, escalate the deal's priority.

Example: Reminder email sent ➔ No reply in 3 days ➔ Task assigned to rep.

## 03 Proposal & contract workflow

Trigger: Proposal requested or deal enters "Negotiation" stage.

1. Auto-generate a proposal with dynamic fields (client name, pricing, etc.).
2. Send proposal via Flowla, tracking when the document is opened.
3. If not viewed within three days, send a gentle reminder to the buyer.
4. Once the contract is signed, update the deal status to "Closed Won" and create onboarding tasks.

Example: Proposal sent ➔ Not viewed in 3 days ➔ Reminder triggered

04 Post-demo follow-up workflow
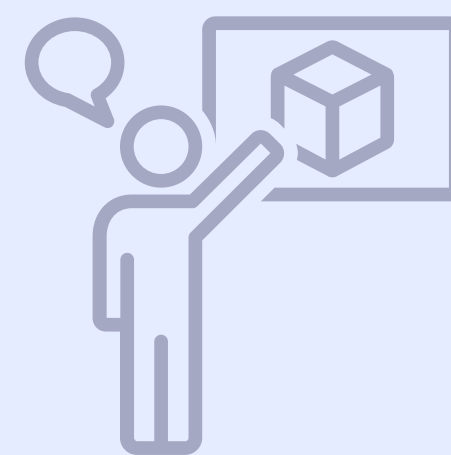
Trigger: Demo meeting completed.

1. Automatically send a personalized thank-you email to attendees.
2. Attach a flow with the next steps and additional resources discussed during the demo.
3. If the email isn't opened within 48 hours, create a task for the rep to follow up.

Example: Demo held → Email sent with resources → No response → Task assigned

05 Customer onboarding workflow

Trigger: Deal status changes to "Closed Won".

1. Automatically generate and send an onboarding flow to the new customer, including setup instructions.
2. Schedule automated reminders for key milestones (e.g., first check-in, product training).
3. Notify the Customer Success Manager (CSM) if a client hasn't completed onboarding within 14 days.

Example: Contract signed → Flow sent with onboarding steps → Reminder after 7 days

06 Multithreading with key stakeholders workflow

Trigger: A new decision-maker (e.g., CRO) is identified on the buyer's side.

1. Automatically create a CRM task for the sales rep to connect with the new stakeholder on LinkedIn.
2. Send a personalized introduction email from the rep's inbox.
3. Assign a follow-up task to discuss their specific needs.

Example: CRO identified → Task created → Rep connects on LinkedIn

07 Churn prevention workflow

Trigger: Client engagement drops below a set threshold.

1. Automatically send a personalized email offering help or requesting feedback.
2. Notify the Customer Success Manager if the client doesn't respond within a week.
3. If engagement improves, send a follow-up message thanking the client for reconnecting.

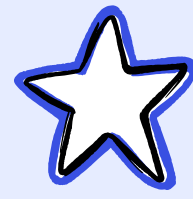Example: Low engagement detected → Email sent → No response → CSM notified

Steps to implement sales process automation

Follow these key steps for a seamless start to automating your sales process.

⭐ **Audit your current sales process**

Identify manual tasks and bottlenecks. Ask yourself: What's repetitive? Where are the delays? Where do errors occur most often?

⭐ **Choose the right tols**

There are multiple tools you can use, e.g. CRM, lead generation, customer relations, or workflow automation software. Ensure tools align with your team's workflows and work well together.

⭐ **Build automation workflows**

Set up sequences to automate repetitive steps (e.g., lead follow-ups). Align workflows with sales playbooks and buyer journeys.

⭐ **Train your team**

Provide training on new tools and workflows to ensure smooth adoption.

Sample implementation timeline

Week 1
Audit sales processes and map automation opportunities.

Week 2
Identify tools and set up basic automations (e.g., follow-ups).

Week 3
Test workflows and get feedback from early users.

Week 4+
Launch full workflows, track performance, and optimize.

Automate your playbooks with Flowla Autopilot

Use Flowla AutoPilot to automate sales workflows seamlessly:

- Auto-create flows when a demo or onboarding call is booked on Calendly.
- Send follow-ups based on contact engagement (e.g., multiple link views).
- Trigger CRM tasks to connect with new contacts on LinkedIn.
- Auto-update deal priority when flows are viewed frequently.
- Send reminders to clients before scheduled meetings.

See Flowla AutoPilot in action

Streamline your sales process with digital sales rooms designed to move your deals forward.

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