AUTOMATIONS

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Automation - Triggers

In LeadSquared there are trigger points which could define when the automation should be executed or initiated. Some of the common ones are:

1. Lead Triggers
2. Activity Triggers
3. User Triggers
4. Task Triggers

Automation – Lead Triggers

Under the Lead Triggers there are four different trigger points. These are:

New Lead Added	Triggers the automation when a new lead is created in LeadSquared account. **Note:** You can also trigger the automation on lead import. There's a **Trigger on Import** checkbox available in the lead create dialog box.
Lead Update	Triggers the automation when a lead field is updated. For example: Send the lead owner an email when the lead's score increases.
Lead Added to List	Triggers when a lead is added to a list. For example: Add leads with low engagement to a separate list and send them specific nurturing emails. **Note:** You can also manually trigger an automation from a static list enabling the checkbox for Allow Manual Trigger while setting up automation with Lead Added to List trigger.
On a Specific Date	Triggers on a chosen date. For example: set up a customer retention process on renewal dates.

Automation – Activity Triggers

Under the Activity Triggers there are two different trigger points. These are:

New Activity on a Lead	Triggers when a lead performs an activity or set of activities. 1. Send a thank you email when a lead submits a form. 2. Automatically add leads to a list if they open an email campaign. 3. Send a special offer email to a lead who's viewed your pricing page
Activity Update on Lead	Triggers when an activity posted on a lead gets updated. This trigger only includes custom and sales activities. 1. When a sales activity is added to a lead, update the lead stage to 'customer'. 2. When a custom activity (e.g., site visit) status is updated to 'complete', send the lead an email.

Automation – Task Trigger

Under the Task Triggers there are three different trigger points. These are:

Task Create	Triggers when a task is created. • Notify users with a personalized email with all the available mail merge fields
Task Reminder	Triggers when a task reminder is created. • Send emails to users reminding them to collect certain lead details or documents related to the task.
Task Complete	Triggers on the completion of a task. • Post an activity once a task is completed. You can then create a follow-up task for a different team. For example, once the sales team has completed a task, post an activity and then create a task for the accounts team.

Automation – User Trigger

Under the User Triggers there are three different trigger points. These are:

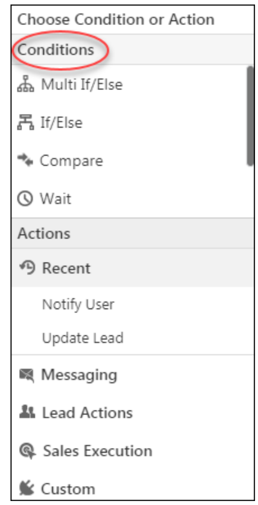
On a specific date	Use this trigger to initiate your automation on a specific date. It works best for sending greetings on special occasions like birthdays, joining dates, anniversaries etc. **Note:** You must create these dates (birthdays, joining dates, etc.) as custom fields of type date-time for your users if you want to use this trigger.
Start of a Workday	You can trigger an automation at the start of each workday. This works best for automatically checking-in your users at the start of their shifts. Note: This trigger works according to the **Workday Templates** you define.
End of a Workday	You can trigger an automation at the end of each workday. This works best for automatically checking-out your users at the end of their shifts. **Note:** This trigger works according to the Workday Templates you define..

Automation - Conditions

When a condition is met, the next step in your automation will trigger.

You can follow up a condition with an action (e.g., wait 3 days then send an email) or with more conditions (e.g., wait 3 days then check if the lead stage has changed).

The conditions you can set are ‘Multi If/Else’, ‘If/Else’, ‘Compare’, ‘Wait’, ‘Wait Until Activity’ and ‘Split Test’.



If/Else

The If/Else condition lets you setup Yes/No criteria. It allows you to set up alternative courses of action based on whether your criteria is met or not. You can set up If/Else conditions on lead, activity and task fields.

Multi If/Else

Helps you set multiple If/Else conditions at the same level. Use the Multi If/Else condition when you have many outcomes to automate. The If/Else cards here will be aligned at the same horizontal level and the performance will be faster than using many single If/Else cards.

Compare

The ‘Compare’ automation action lets you compare the values of lead and activity fields and set up different courses of action based on the results. You can also use saved responses from webhooks and Lapps in your comparisons.

Wait

The wait condition lets you delay an action or condition for a specified period. A few of the many applications of this feature are listed here –

- Delay sending emails to avoid flooding a lead's inbox.
- Wait till a lead score exceeds 'x' number and then change the lead stage.
- Wait a certain amount of time to see if a lead has performed an activity (Email opened, email link clicked, etc.) and then send a follow-up email.
- Wait till a lead's stage changes from 'Opportunity' to 'Customer' and then send 'Customer-only' discount emails.
- Send email campaigns on specific occasions (birthdays, festivals, etc.).
- Wait till a sales user has sold a product and then send a thank you email.

If you are giving an Email action, you have the option to give another condition called **Wait Until**. This condition allows you to delay until an Email activity is satisfied by the Lead in order to proceed to another action.

Wait Until Activity

The 'Wait Until Activity' condition lets you wait until activities are performed before taking an action. You can choose to wait until a single activity occurs or you can set **and/or** conditions to include multiple activities.

Note: The 'Wait Until Activity' automation card **must** be followed by an action.

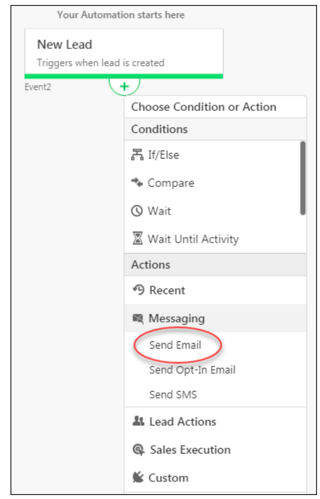
Split Test

Lets you experiment with different email content to see what your customer engage with best.

Automation Actions - Messaging

- The Messaging action of Lead Automation allows to system to send an email/SMS to the leads once when the conditions are met.

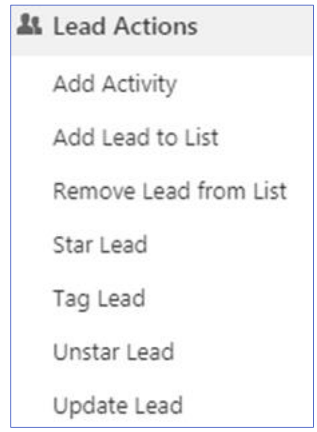
- Sending SMS through automation requires you to first install and configure an SMS connector.



Automation Actions – Lead Actions

Following are the leads actions that system can perform as and when the conditions are met:

1. Add Activity
2. Add Lead to List
3. Remove Lead from List
4. Star Lead
5. Tag Lead
6. Unstar Lead
7. Update Lead
8. Update Activity



1. **Add Activity**: Allows you to add a custom activity. Click *Add Activity* and the Add Activity pop-up box appears. **Note**: If your custom activity has any associated custom field, click *Add an Additional Field* to add and select custom activity fields to associate to the activity. You can additionally add mail merge field to the selected activity type.

2. **Add Lead to List**: Allows you to add the Lead based on the previous scenario satisfied by the Lead in the workflow. Click *Add Lead to List* and the following pop-up box appear.

3. **Remove Lead from List**: Allows you to remove a Lead from a list based on the previous scenario in the Automation workflow. Click *Remove Lead from List* and the following pop-up box appears.

4. **Star Lead**: Star Lead allows you to highlight and discover Leads easily.

5. **Tag Lead**: Allows you tag a Lead. Tagging is a quick way to add a label to a lead for easy identification of Leads.

6. **Unstar Lead:** Allows you to unstar or unmark a Lead as important.

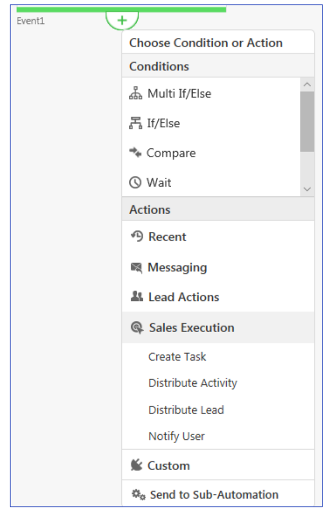
7. **Update Lead:** Allows you to update the Lead field values with new values if required. Here as an example, the Lead Stage is given as Opportunity and Notes is also updated. These Lead fields are updated with these values if the Lead satisfies the criteria you have specified.

8. **Update Activity:** If you have selected an activity based trigger (New activity on lead or Activity update on lead), you an additional lead action, *Update Activity*, will appear under the lead actions menu. This functionality lets you automatically update any field created under that activity.
   - Let’s say you triggered your automation with a ‘New Activity on Lead’ and set that new activity as a ‘Meeting’. You can now use the *Update Activity* option to automatically update any fields created under the meeting activity.
   - Say you want to update the ‘Notes’ field of the meeting to say ‘Done with Meeting’, just click the *Update Activity* option, select the ‘Notes’ field and add the value ‘Done with Meeting’. You can also add additional activity fields using the *Add Activity Fields* link

Automation Action – Sales Execution

The Actions under Sales Execution of Automation handles the following output:

- Create Task
- Distribute Activity
- Distribute Lead
- Notify User



Notify User: Allows you to send a notification Email to a LeadSquared user. By default, the notification is directed to the lead owner. You can add more LeadSquared users to the '*To*' field. You can also direct the notification to the activity owner or include the activity owner in the '*Cc*' or '*Bcc*' fields. You can also mail merge lead fields, owner fields, sender fields and activity fields into your email content using the mail merge option

Create Tasks: Allows you to create both appointment and to-do type tasks. **Note:** You can mail merge lead and activity fields in the subject and description of the task. You can also schedule the task to be created using date-time fields from an activity (only for automations with activity triggers).

Distribute Leads: The distribute lead action allows you to set conditions to distribute leads among your users. As an example, let's say you want to distribute all leads from a certain city to specific users. Click the **Distribute Lead** action to open the **Distribute Lead** pop-up window. Enter a rule name in the space provided and then click the **choose conditions(s)** link.

On the **Select Criteria** pop up, choose the lead field as **City** and then enter **Bangalore**.

Next, click **Add Condition.** Now select one of the following options from the drop-down

- **Users** – Select users to distribute the leads to.
- **Sales Groups** – Select the group you want to distribute leads to.
- **User Properties** – Perform an advanced search based on user attributes.

While distributing leads to users, You'll see an **Availability Status** section at the bottom if you've enabled the Check In and Check Out feature for user management. You can toggle the between the **All** and **Available** options to distribute leads to all users or to available users only.

You can proceed to add multiple rules by using the **New Rule** link. You can name each rule and then re-order them by simply dragging and dropping. The rules will execute in the sequence you set up.

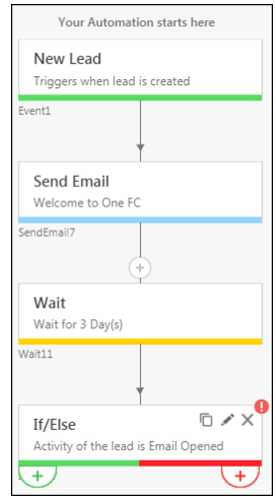
You must set a default rule that will execute when no other rules match the set criteria. The default rule will automatically distribute the lead to a user you select.

Note: If you've chosen the **Available** users option and the user is not available, the lead will be distributed to the user specified in your default rule.

Automation Action – Send to Sub-Automation

Use it to –

1. Keep your main automation brief and simple by sending additional steps to a sub-automation.
2. Re-use a standard sequence of steps across different automations.
3. Build a large network of automations without running out of automation cards/nodes (Only 50 nodes are allowed in a single automation).



Example:
You're sending out an email to all new leads. You want to follow one long course of action (Flow A) for leads that open your email and another (Flow B) for those that don't.
Before you branch out into Flow A or B, your automation may look something like the screenshot given above.
The green + icon under the If/Else automation card will branch out into Flow A, your positive flow for the leads who opened your email.
The red + icon will branch out into Flow B, the negative flow for leads who didn't open the email.
The sub-automation feature now lets you send both flows (A and B) to separate sub-automations and keep your parent automation clean. What's more, you can re-use Flow A and B across any new automations you create.

Points to Remember

- Only published sub-automations will show up in the Send to Sub-Automation pop-up. You can send your main automation to any sub-automation you published previously.
- You can create sub-automations to a maximum of three levels (Main

Automation>Sub 1>Sub 2>Sub 3).

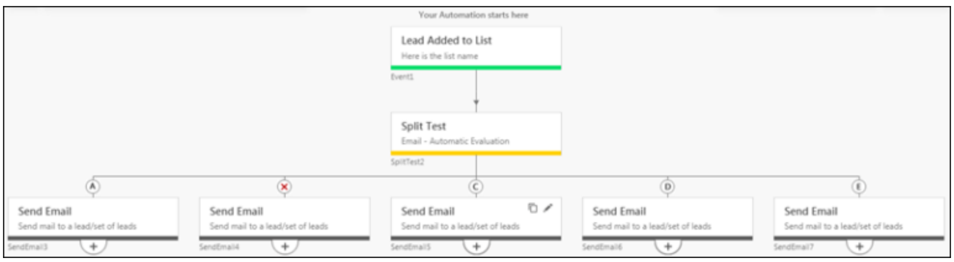
- You can create up to 500 sub-automations.

AUTOMATION FOR MARKETING

SPLIT TESTING/A-B TESTING VIA AUTOMATION

Lead Automation Conditions – Split Test

A split test lets you experiment with different email content and find what works best for your automation.



You can try out different subject lines, senders, etc. and see how your leads are responding. Based on the responses you can either manually or automatically select the best email to use going forward. Lead Automation Conditions – Split Test

Split Test – Use Case

Let's say your marketing team produced two different subject line for same email but unsure which will get them more traction either in terms of highest email open or highest number of links clicked in the email. Will it be?

- "Hey, we're so glad you signed up" or
- "Welcome to the <my organization> family!".

With split test, you can send 2 emails (one with each subject line) to your leads and analyze which one receives more opens/clicks. Based on these results, you can select one of the emails as the 'winner'. All new leads entering the automation will now only receive the email you chose as the 'winner'.

Split Test – How it works?

As described in the example use case section, a split test lets you send multiple emails and determine a winner based on how your leads respond.

There are two way to determine the winner:

Automatic Split Test	Manual Split Test
The winner is decided automatically by the system based on the number of email opens or clicks after a specified number of hours/days/weeks. If the number of clicks/opens are equal after the specified time, a user will have to manually choose a winner from the automation report.	The winner must be determined manually from the automation report after the specified number of hours/days/weeks. The specified user(s) will receive a notification to manually select a winner after the configured period has elapsed

Prerequisites

The split test feature is only available on select plans. If you want it enabled for your account, contact us at support@leadsquared.com.

Note: These emails are sent to your leads in round robin fashion until a winner is determined.

Once an email is selected as the winner (automatically or manually), it'll be sent to all leads entering the automation from that point onward.

Note: You can test up to 5 different emails.

Setting Up a Split Test

- Select an automation trigger
- At any point after selecting a trigger, click the expand icon under any automation card and choose the **Split Test** condition
- On the **Configure Split Test** pop-up, choose whether you want to determine the winner automatically or manually.
- Click **Save**.
- To add more emails to your split test, click the add icon under the split test card.
- Click the **Edit** icon on each **Send Email** card to set the email content.
- After you're done, click **Publish** on the top right corner of your screen to publish the automation.

1. If you select the **automatically** option, choose whether you want to determine the winner based on the number of email opens or clicks. Next, set the number of hours/days/weeks you want the winner to be determined after. Finally, select the users you want to notify once a winner is determined.
2. If you select the **manually** option, choose the user(s) you want to notify to select a winner. Then set the number of hours/days/weeks you want to wait for before you allow users to select the winner.

Please Complete Exercises

Open the Step-by-Step Exercise document from https://myleadsquared.sharepoint.com/:b:/s/LeadSquared_Training/EaKt67v3E79MoxDvR1_MyIMBNGrgX-0ySUA14IIP3IR0sg?e=w0Jvff and complete till chapter 18

x

THANK YOU!