LEAD-INTAKE AND AUTO-FOLLOW-UP AUTOMATION (MAKE.COM, GOOGLE SHEETS, FORM, GMAIL)
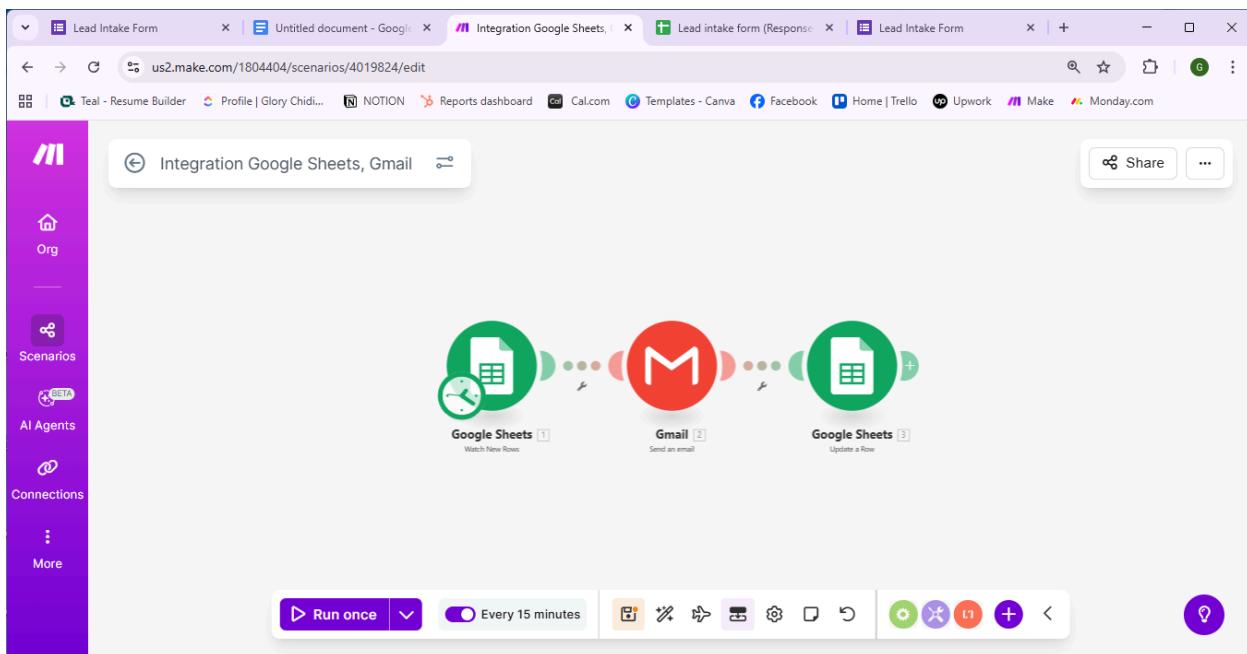
Lead In-Intake Google Form
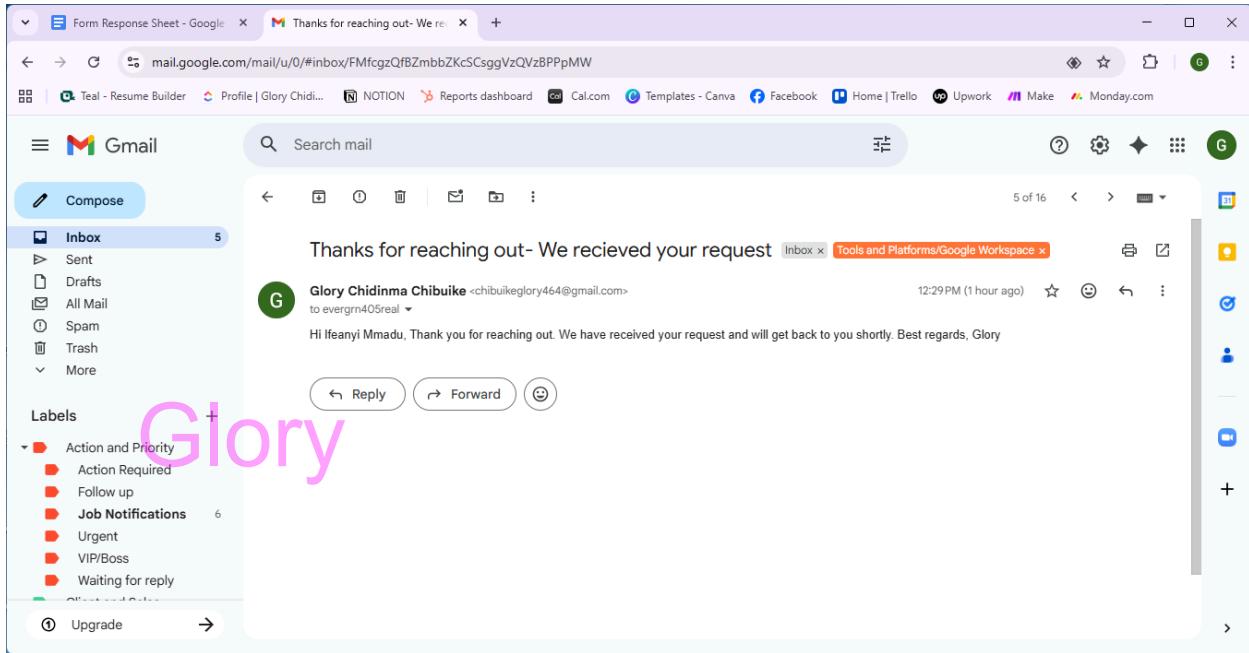

Automation workflow built in Make.com connecting Google sheets>Gmail>Lead Status update

Automated generated Lead Email (Gmail)

Lead Intake & Auto-Follow-Up SOP

Purpose:
To automate the process of capturing leads, recording them in a Form response sheet, sending follow-up emails, and updating lead status automatically.

Trigger Condition:
A lead submits a Google Form.

Automated Actions:
1. Make.com detects the new form submission.
2. Lead data is automatically recorded in Google Sheets.
3. An automated follow-up email is sent via Gmail.
4. The Google Sheet columns "Lead Status" and "Follow-Up Sent" automatically updates to:
● Lead Status: Contacted
● Follow-Up Sent: Yes

Sales / Team Responsibilities:
● Review new leads in Google Sheets.
● Take any additional manual follow-up actions if needed.
● Update lead status in the sheet if further follow-up is required.

Expected Outcome:
- Faster response to new leads
- Automatic updating of lead status and follow-up tracking
- Centralized lead tracking
- Improved lead-to-conversion ratio
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RESULTS & BUSINESS IMPACT:
- Operational Improvements
- All new leads are automatically captured and logged
- Automated follow-up emails reduce human delay
- Google Sheet Lead Status and Follow-Up Sent columns update automatically
- Centralized sheet and tasks improve accountability

Business Value Delivered:
- Ensures every lead is acted on promptly
- Standardizes lead follow-up process
- Reduces response time
- Supports higher conversion rates

Estimated Efficiency Gains (Simulated):
- 60–80% reduction in manual lead logging
- Automatic lead status updates and follow-up tracking
- Follow-up emails sent instantly upon submission
- Improved response time by 30–50%
- No leads missed due to automation