PRISM AI
Lead Follow-Up Automation Playbook
Stop losing deals to silence. Automate the follow-up that closes.

80% of sales require 5+ follow-ups. 44% of salespeople give up after one. This playbook gives you the exact sequences, triggers, and automation logic to follow up faster, smarter, and more consistently — without lifting a finger after setup.

■ **What you'll build:** A fully automated lead follow-up system that responds in minutes, nurtures over days, and escalates to humans only when a lead is warm. Works with any CRM (HubSpot, Go High Level, Pipedrive, or even a spreadsheet).

CHAPTER 1: THE FOLLOW-UP PROBLEM (AND WHY AUTOMATION FIXES IT)

Why most businesses lose leads they should close:

✗ First response takes >1 hour — conversion drops by 10x after that

✗ No follow-up system — reps forget, get busy, or give up

✗ Generic follow-ups — same message to every lead regardless of source or behaviour

✗ No escalation logic — warm leads sit in a queue next to cold ones

✗ Leads fall out of the pipeline between tools — CRM ≠ email ≠ WhatsApp

The automation fix:

✓ Auto-acknowledge every lead within 60 seconds of submission

✓ Trigger a timed sequence based on lead source and behaviour

✓ Escalate automatically when a lead opens, clicks, or replies

✓ Remove leads from sequences the moment they respond (no robotic pile-ons)

✓ Notify the human only when a lead is genuinely warm

CHAPTER 2: THE 5-TOUCH SEQUENCE FRAMEWORK

Every lead follow-up sequence should have 5 touches across 14 days. After that, move them to a long-term nurture. Here's the exact structure:

Touch	Timing	Channel	Goal	Template
1	< 5 min	Email/SMS	Acknowledge + set expectation	See Ch. 3
2	Day 1 (+4h)	Email	Value add + soft CTA	See Ch. 3
3	Day 3	Email	Social proof + objection handle	See Ch. 3

4	Day 7	SMS or WhatsApp	Direct ask — are you still interested?	See Ch. 3
5	Day 14	Email	Breakup email — permission to close	See Ch. 3

■ **Key rule:** The moment a lead replies, books, or takes action — pull them OUT of the sequence immediately. Nothing kills a warm conversation faster than a robotic follow-up arriving after they've already responded.

CHAPTER 3: COPY-PASTE MESSAGE TEMPLATES

Touch 1 — Immediate acknowledgement (within 5 minutes)

Subject: Got your enquiry — here's what happens next

Hi [First Name],

Thanks for reaching out — I've got your message and will be in touch within [X hours/by end of day].

In the meantime, here's what you can expect:
→ A quick call to understand exactly what you need
→ A tailored recommendation (not a generic pitch)
→ Clear next steps — no pressure

If you need anything urgently, reply to this email or call [number].

Talk soon,
[Your name]

Touch 2 — Day 1 value add

Subject: One thing most [industry] businesses get wrong

Hi [First Name],

While I prepare your recommendation, I thought this might be useful:

[Insert 1 practical tip relevant to their pain point — 2-3 sentences max]

Most of the businesses I work with tell me [common pain point]. If that resonates, it's worth a 15-minute conversation.

[Book a call: link] or just reply here.

[Your name]

Touch 3 — Day 3 social proof

Subject: How [similar business] solved [problem]

Hi [First Name],

Quick one — we recently helped [type of business] go from [before] to [after] in [timeframe].

The main thing that made the difference: [one-line insight].

Happy to walk you through exactly how we did it — takes 15 minutes.

[Book here: link]

[Your name]

Touch 4 — Day 7 SMS/WhatsApp (direct)

Hi [First Name], [Your name] here from [Company]. Just checking in on your enquiry from last week — are you still looking for help with [topic]? Happy to jump on a quick call this week if so. ■

Touch 5 — Day 14 breakup email

Subject: Should I close your file?

Hi [First Name],

I've reached out a few times but haven't heard back — which usually means one of three things:

1. You've sorted it yourself (great!)
2. The timing isn't right
3. My emails are landing in spam

Either way — no hard feelings. I'll close your file unless I hear from you.

If timing was the issue, just reply "not yet" and I'll check back in 30 days.

[Your name]

■ *Breakup emails consistently get the highest reply rates in the sequence. The subject line alone triggers responses from people who've gone cold for weeks.*

CHAPTER 4: AUTOMATION SETUP — TOOL-BY-TOOL

HubSpot (Free)

1. Create a Contact-based Workflow

2. Trigger: Form submitted OR Contact created

3. Add delay steps between each email

4. Use 'If/then' branch: if email opened → send Touch 2 sooner

5. Add 'Contact replies' as an unenrollment trigger

Go High Level

1. Build a new Automation → trigger: Lead created

2. Add SMS + email steps with wait timers

3. Use the 'Conversation replied' trigger to stop sequence

4. Tag leads as 'warm' when they click a link

5. Route warm leads to your pipeline board automatically

Make.com (Zapier alternative)

1. Trigger: New row in Google Sheets OR new CRM contact

2. Action 1: Send email via Gmail/Mailgun

3. Add a delay module (hours/days)

4. Action 2: Send follow-up if no reply (check email thread)

5. Action 3: Send Slack/WhatsApp notification when lead replies

Spreadsheet + Zapier (no CRM)

1. Google Form → Google Sheet (lead capture)

2. Zap: New row in Sheet → send email via Gmail

3. Use Zapier Delay → send follow-up email Day 3

4. Mark 'replied' manually → Zap stops sending

5. Weekly: filter sheet for Day 7 leads → SMS manually or via Zap

CHAPTER 5: ESCALATION LOGIC — WHEN TO HAND OFF TO A HUMAN

Automation handles the volume. Humans close the deals. Here's exactly when to trigger a human hand-off:

Signal	What it means	Action
Lead replies to any touch	Interested, engaged	Notify rep immediately, remove from sequence
Lead clicks CTA link 2+ times	High intent	Notify rep, move to 'hot' pipeline stage

Lead books a call	Ready to talk	Confirm booking, prep rep with lead context
Lead asks a specific question	Research mode	Rep responds personally within 1 hour
Lead says 'not yet' / 'later'	Timing issue	Move to 30-day nurture, re-enter sequence
No response after Touch 5	Cold/unqualified	Move to monthly newsletter list only

CHAPTER 6: IMPLEMENTATION CHECKLIST

Week 1 — Build the foundation:

- Map your current lead sources (web form, referral, ads, social)
- Choose your automation tool (HubSpot free is a solid start)
- Write your 5 message templates (use Ch. 3 as base, personalise)
- Set up Touch 1 auto-acknowledgement — this alone will improve conversion
- Test the sequence end-to-end before going live

Week 2 — Optimise:

- Add unenrollment triggers (reply, booking, click)
- Set up escalation notifications to your phone/Slack
- A/B test subject lines on Touch 1 and Touch 2
- Review open rates and click rates after first 20 leads
- Adjust timing based on when your audience is most responsive

Week 3+ — Scale:

- Segment sequences by lead source (different message for ads vs referrals)
- Add a post-sale sequence (onboarding, review request, upsell)
- Build a re-engagement sequence for leads that went cold 60+ days ago
- Track close rate before vs after automation — present ROI internally

Want us to build this for you?
We'll audit your current lead process, map the automation, and implement the full follow-up system in your existing tools — free 30-minute discovery session.
Book at: prismaiservices.netlify.app