Automation Documentation: Lead Intake & Sales Routing

Automation Title

Typeform-to-Sales CRM Lead Enrichment & Routing

Category

Sales Automation / Lead Management

Detailed Description

This automation streamlines the process of capturing, enriching, and managing inbound leads from a Typeform submission.

Business Problem

Sales teams often waste time manually copying form submissions into CRMs, enriching data from third-party APIs, and assigning reps. Leads without enrichment or missing data frequently slip through cracks, while follow-ups (Day 0 and Day 3) are inconsistent. Managers also lack visibility into daily pipeline flow and error handling.

Solution

This automation ensures every lead submission is:

- Captured from Typeform instantly.

- Enriched via Apollo.io (with retry logic).

- Logged in **two Airtable tables**:

- ○ *Leads* → active customer view.

- ○ *Lead Logs* → historical workflow log with outcomes/errors.

- Routed to Slack alerts for *enriched* and *non-enriched* leads.

- Assigned to sales reps in **Trello** based on company size (Senior for large, Junior for small or unknown).

- Synced with **HubSpot** CRM.

- Welcomed with **Day 0 email**, with branching logic (demo request vs general).

- Followed-up with **Day 3 email** if no response or CRM activity.

- Summarized daily via Slack digest, with counts of created, updated, duplicate, and error leads.

Expected Outcomes

- Reduced manual data entry.

- Consistent sales rep assignments.

- Automated follow-up sequences.

- Manager visibility into daily pipeline.

- Error resilience with Slack + email alerts on failure.

How It Works (Functionality)

Workflow 1: Main (Triggered by Typeform submission)

1. **Trigger** → Typeform submission.

2. **Set + Function node** → Extract email domain, prep enrichment.

3. **Apollo.io enrichment** (retry ×2, 3s).

4. **Airtable Search (Leads)**

   - If **exists + new data** → Update Leads + Logs.

   - If **exists + no new data** → Log as Duplicate in Logs, end branch.

   - If **new** → Create records in Leads + Logs.

5. **If (Enriched vs Not Enriched)**

   - Enriched → Slack alert (*Lead Review: Enriched*).

   - Not enriched → Slack alert (*Lead Review: No enrichment*).

   - Both paths → Still logged in Airtable.

6. **Merge Node** → unify all lead outcomes.

7. **Email Branching**

   - Requested demo → Send demo booking email.

   - No demo → Send general welcome email.

   - All → Mark `Day0_Email_Sent = TRUE` in Leads.

8. **HubSpot Create/Update Contact** (retry ×2, 3s).

9. **If (Company Size)**

   - ≥ threshold → Trello card → Senior Sales Manager → Sales email.

   - < threshold or N/A → Trello card → Junior Sales Rep → Sales email.

10. **Error Handling**

- Airtable failure → Slack alert + email backup → Log in Logs.

- HubSpot failure → Slack alert + email backup → Log in Logs.

Workflow 2: Daily Digest & Day 3 Email

1. **Trigger** → Scheduled daily run.

2. **Airtable Search (Logs)** → Leads in last 24h (`IS_AFTER({Timestamp}, DATEADD(NOW(), -1, 'days')))`).

   ○ **Function Node** → Aggregate counts (Created, Updated, Duplicate, Error).

   ○ **Slack Digest** → Send to *#daily-leads-digest* channel.

3. **Airtable Search (Leads)** → Find leads where:

   ○ `Day0_Email_Sent = TRUE`

   ○ `Day3_Reminder_Sent = FALSE`

   ○ `Status != Responded`

   ○ `Created at + 3 days < NOW()`

4. **Day 3 Reminder Email** → Send to filtered leads.

   ○ Update Leads → mark `Day3_Reminder_Sent = TRUE`.

Tools Required

- **n8n** (automation platform, self-hosted or cloud).

- **Typeform** (trigger for lead intake).

- **Apollo.io** (lead enrichment API).

- **Airtable** (Leads + Logs tables).

- **Slack** (Lead review alerts + daily digest).

- **HubSpot** (CRM contact creation/update).

- **Trello** (task assignment by company size).

- **Gmail** (Day 0 + Day 3 emails).

Size of Project

Large (10+ tasks)

- Covers intake, enrichment, deduplication, routing, CRM sync, Trello assignment, multi-branch emailing, error handling, and reporting.

Setup Requirements

- Typeform API key + connected form.

- Apollo.io API key.

- Airtable API key + two bases: **Leads** & **Lead Logs**.

- Slack OAuth credentials.

- HubSpot private app token.

- Trello API key + Board ID + List IDs.

- Gmail OAuth credentials.

Deployment Time Estimate

- **2–4 hours** for initial setup.

- **2–3 days** for API credential approval, Trello/Airtable schema setup, and customizations.

Value Proposition

- Saves **10–15 hours/week** in manual lead entry & enrichment.

- Automates follow-ups (reducing missed opportunities).

- Ensures **every lead is owned**, even without enrichment.

- Provides managers with **daily reporting & transparency**.

Demo Video

Known Limitations

- Apollo enrichment may fail if company domain not recognized.

- HubSpot free tier API has rate limits.

- Day 3 reminder relies on Airtable timestamps; more robust in production with HubSpot Activity sync.

- Global error workflow not yet implemented (only local error branches).

Testimonials/Use Cases

- Internal testing: 5 sample leads processed across all outcomes (Created, Updated, Duplicate, Error).

- Sales manager reported increased visibility with Slack digest summary.

Size Classification

Large (10+ tasks)

Estimated ROI

If sales ops rep spends ~3 mins/lead manually:

- 200 leads/month × 3 mins = **10 hours saved/month**.

- At $25/hour = **$250/month savings**.

- Tools cost (n8n cloud + Typeform + Airtable base): ~$50/month.

- **Net ROI: +$200/month.**

Version & Updates

- **v1.0** – Initial release: Intake, enrichment, Airtable logs, Slack alerts, Day 0 email.

- **v1.1** – Added Trello assignments + Day 3 reminder logic.

- **v1.2** – Added error handling branches (Airtable + HubSpot failures).

- **v1.3 (Planned)** – Global error workflow + HubSpot Activity sync for more robust Day 3 logic.