



Basic Sales Automation After Lead Submit: Send Auto Text Message to Schedule Appointment

Tools:

[Zapier](#)

[Callfire](#)

Your Optin (Form) Tool of Choice

Gmail (if you want to setup lead confirmation e-mails)

[Pipedrive](#) (if you want to setup CRM integration)

Process:

Buy a local number in CallFire. Activate it and turn text messaging on. Buy some credits. All that stuff.

Setup a multi-zap in Zapier to connect your apps.

The attached example will pull in a lead and do a few things with it including e-mail a notification and add it to Pipedrive CRM + add a record to Google Spreadsheet.

It then delays for 5 minutes and sends a personalized text message to the prospect from our local Callfire number.

This is designed to set an appointment or initiate the sales process without you having to outbound up front (make sure you test... if your prospects aren't replying to text messages you better pick up the phone. We've found 90% prefer a text message over a telephone call after submitting an online inquiry if the offer isn't extremely time-sensitive).

Zapier makes the opportunities from there limitless. You could add their

responses to Pipedrive, Trigger an activity, assign the lead to a salesperson, really just about anything your heart desires.

Don't forget to include a Zap to add your lead to your e-mail autoresponder series. Ours triggers elsewhere so it isn't required.

When a prospect clicks a specific link in any e-mail or calls/texts the Callfire number we have another Zap setup to remove them from all autoresponder series automatically.

Use your noggin to automate this stuff or [send me a Facebook Message](#) if you need help/ideas to solve a specific challenge you're having.

Continue to the Insider's Screenshots below...



TRIGGER

1. New Survey Response



ACTION

2. Send Email



ACTION

3. Create or Update a Deal



ACTION

4. Create Spreadsheet Row



ACTION

5. Delay For



ACTION

6. Create Text Message



 [Get Help](#) Response Time: -2h | M-F 9am-5pm PST

Subject (required)

You have a new lead ( Step 1 [Question(25)]  Step 1 [Question(26)])

Body Type (optional)

Html

Body (required)

Congratulations! You have a new hot lead that just entered the pipeline.

Lead Information:

Date Submitted:  Step 1 [Datesubmitted]
Lead Qualified:

 Step 1 [Question(47)]
Purchase or Refi:  Step 1 [Question(10)]

Name:  Step 1 [Question(25)]  Step 1 [Question(26)]

Phone:  Step 1 [Question(43)]

Email:  Step 1 [Question(42)]

Customer Estimated Credit Score:  Step 1 [Question(21)]

Timeframe:  Step 1 [Question(23)]

Branch Served:  Step 1 [Question(22)]

Street Address:  Step 1 [Question(29)]

 Step 1 [Variable("STANDARD GEOCITY")]  Step 1 [Question(32)]  Step 1 [Question(33)]

Comments or Questions:  Step 1 [Question(13)]

Sent From:  Step 1 [Variable("STANDARD DEVICE")]

Referring Site:  Step 1 [Variable("STANDARD REFERER")]

Coffee is for Closers Only...

Scot

Click Here To Get The Variables
From Your Optin Fields


Set up Callfire Messages

Message (required)
This is the text message to be sent.

Hey  Step 1 [Question(25)] -- it's ; "i " in . I got the
answers you submitted online. When's a good time to discuss?

Phone Number (required)
This is phone number of the recipient of the text.

 Step 1 [Question(43)]

From (optional)
Set the from number of the text

 8461

[Continue](#)



Now that your Zapier Multi-Step is Setup...



Your Message, Delivered
877.897.FIRE

You Received a Text Message

Dear Automated Inbound,

You received the following text message from [redacted] who texted [redacted]:

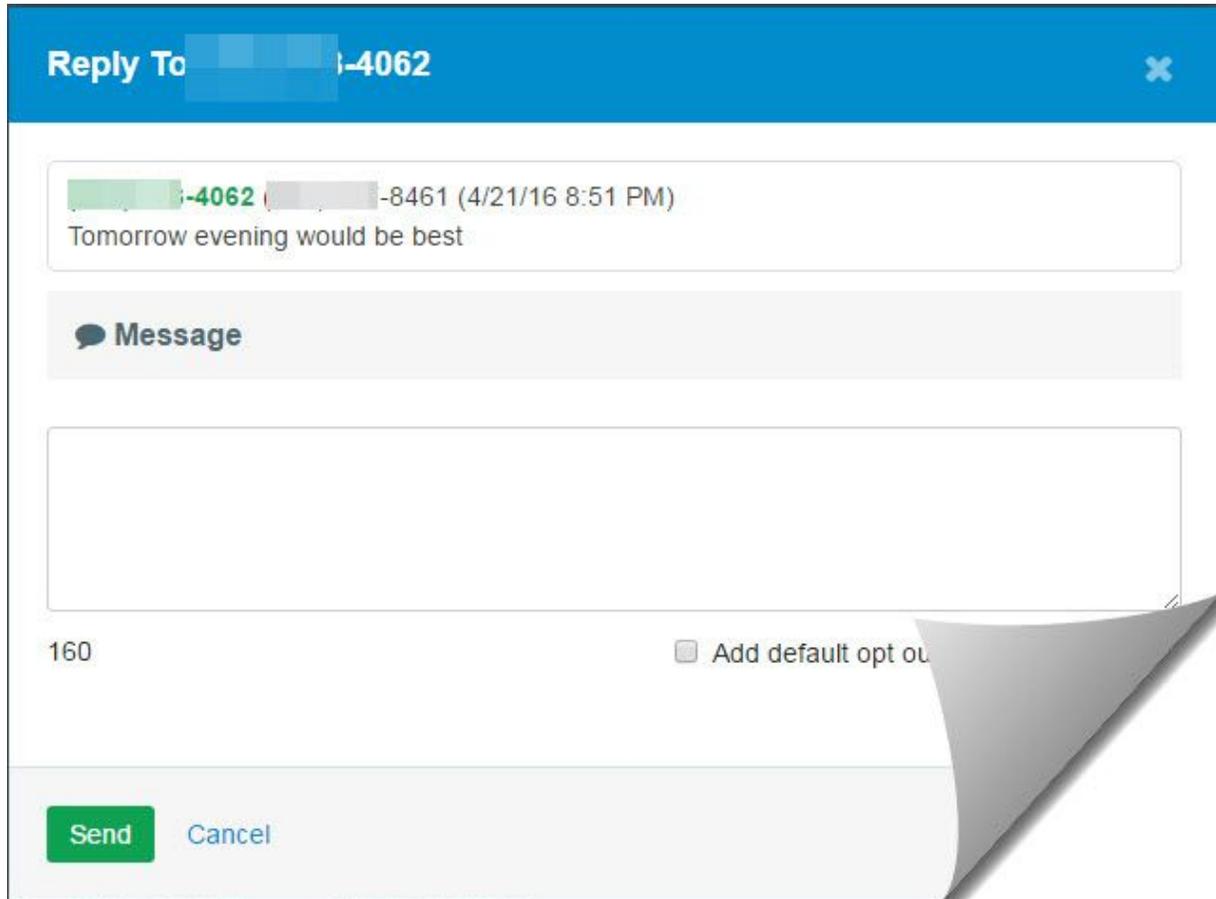
Tomorrow evening would be best

[Reply To Text](#)

Email Notification Of Reply From Your Lead...

Contact Name	Phone Number	Status	Message	Time (EDT) ▾
[redacted] 4062	[redacted] 4062	Received	Tomorrow evening would be best	4/21/16 8:51 PM
[redacted] 4062	[redacted] 4062	Sent	Hey [redacted] -- it's [redacted] "C [redacted] " in [redacted] . I got the answers you submitted online. When's a good time to discuss?	4/21/16 8:49 PM

Text Record Log Inside Callfire Once You Login



Reply To Your Lead's Text Message Inside Of Callfire

Hope that helps...

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