

The Iconic Agent Lead Automation Checklist (Zapier)

☐ Trigger – Aweber or mailing application

☐ Link to Google Spreadsheet Template -

Template here https://docs.google.com/spreadsheets/d/17Qn0dSptSxh1Kfb9NZ0HJYeuC_Lc-YSsazqG86kcqH4/edit?usp=sharing

Be sure to save a copy in your Google Drive. Save it as your project name

☐ Map to your Google Spreadsheet

☐ Setup Callfire Text Message to the lead. This goes out immediately.

Sample for text message: Hi, I hope you're having a great day! My name is [name]. I wanted to follow up the email I sent about [project name] with a quick text. When would be a good time for us to talk?

☐ Send text message to yourself and your team via zapier SMS message

Template: [project name] lead – Name : [lead name] | Email: [lead email] | Phone: [lead phone]

☐ Setup Sly Broadcast ring less voicemail

☐ Send an email to your team via zapier Email. Same format as the SMS/text message to your team but also put a direct link to your lead spreadsheet in the email so you, your team or admins can make immediate updates.

