

Lead Nurturing Workflow Planner

Map what should happen between first interest and a real customer conversation.

1. CAPTURE

Lead source	
Entry form / offer	
Service or product interest	
CRM fields to capture	
Owner / team	

2. UNDERSTAND

What do we know about this lead?	
What problem are they likely trying to solve?	
What content or pages indicate interest?	
What information is still missing?	

3. SCORE

Fit signals	
Engagement signals	
Intent signals	
Recency / decay rule	
Threshold for sales-ready	

4. NURTURE

Email sequence	
SMS use / consent	
Retargeting	
Helpful content	
Wait periods / branches	

5. DETECT INTENT

High-intent form	
Pricing / service page activity	
Repeat visits	
Direct reply / question	
Reactivation after inactivity	

6. HAND OFF

Who gets notified?	
Required response time	
What context should be included?	
What automation pauses?	
What task is created?	

7. LEARN

Lead response time	
Stage progression	
Qualified leads	
Meetings / consultations	
Opportunities	
Customers / revenue	
What should change next?	

Human Takeover Rules

Trigger	Automation action	Human action	Target response time
Consultation / quote form			
Direct reply or question			
Repeated high-intent behavior			
Dormant lead returns			
Complaint / unsubscribe / conflict			

Lead Score Decay

Define how quickly old activity loses weight. A meaningful action today should normally carry more priority than the same action months ago.

Signal	Starting value	Decay after	Reduced value

People + Process + Technology

Automation should make the relationship easier to manage, not make the relationship feel less human.

Need help building the workflow? releasedsolutions.net/contact-us/