

LESSON 7 · ACCOUNT SETUP FOR SUCCESS

YOUR FIRST WORKFLOW

Build one simple automation that captures a lead, notifies your team, and adds it to your pipeline, all on its own.



LESSON RECAP

Get a Workflow Running

WHAT YOU'LL LEARN

- Create a basic workflow with a Form Submitted trigger
- Filter the trigger to the exact form you built
- Set up an internal notification so a new lead never goes unnoticed
- Automatically create an opportunity in your sales pipeline
- Add an organized note with the form's responses using merge tags
- Test the whole flow before trusting it with real leads

🎯 LEARNING OBJECTIVE

Build your very first automation, start to finish. Connect a trigger, add a notification, create an opportunity, add a note, and test it end to end, so every new lead is handled the same way, every time.

KEY DEFINITIONS

Trigger: The event that starts an automation, like a form being submitted.

Allow Re-entry: A workflow setting that lets a contact trigger the workflow again, useful while you're still testing.

Merge Tag: A placeholder like {{contact.name}} that pulls in real contact data automatically.

Execution Logs: The workflow history tab, used to troubleshoot when something isn't firing as expected.

"Workflows save you time by automating routine follow-up tasks. Start with that simple workflow, then expand as you get comfortable."

5 AI Prompts You Can Use Today

1. Workflow Planning Prompt

ACT AS A MARKETING AUTOMATION CONSULTANT

I want to plan my very first automation before I start building it.

- [Insert what form or trigger you want to automate, and your business type]
- The trigger, and 3 actions that should happen after it fires
- One decision I need to make up front, like time zone restrictions or business hours
- A simple way to test it safely before turning it on for real leads
- Keep it to one simple workflow, not a whole campaign.

2. Notification Message Prompt

ACT AS AN INTERNAL COMMUNICATIONS CONSULTANT

I need a short, professional internal notification for when a new lead comes in.

- [Insert your business type and who on your team should be notified]
- A short internal email notification alerting the right person to the new lead
- One line making it easy to personalize for different lead sources
- Keep it friendly and skimmable, this gets read on a phone half the time.

3. Workflow Optimization Prompt

ACT AS AN AUTOMATION CONSULTANT

I want to expand my first workflow to save more time as my business grows, without overcomplicating it.

- [Insert what your current workflow does, trigger and actions]
- 5 ways I could expand this workflow to save more time
- One sentence per idea on what it would take to add
- A warning about the point where a workflow gets too complicated to maintain.

4. Troubleshooting Prompt

ACT AS A TECHNICAL SUPPORT CONSULTANT

My workflow isn't triggering after a form submission and I need to figure out why.

- [Insert what you've already checked, or write "nothing yet"]
- The top things to check first, in the order I should check them
- One thing people commonly get wrong with filters or triggers
- What to check in Execution Logs specifically.

5. Mobile CRM Tip Prompt

ACT AS A PRODUCTIVITY CONSULTANT

I want a quick checklist for reviewing new leads on the mobile app after my workflow runs.

- [Insert how often you check leads on mobile versus desktop]
- A short checklist covering what to check in Contacts, Notes, and Opportunities
- One thing that's easy to miss on a small screen
- Keep it to something I could run through in under a minute.

5 More AI Prompts to Try

6. Follow-Up Sequence Planner

ACT AS AN EMAIL MARKETING STRATEGIST

I want to build a multi-step follow-up sequence for leads who don't respond to my first outreach.

- [Insert your business type and typical time between contact attempts]
- A simple 3-touch sequence: what to send, and how many days apart
- One line of sample copy for each touch
- A rule for when to stop following up automatically.

7. Birthday and Anniversary Message Writer

ACT AS A CUSTOMER RELATIONSHIP CONSULTANT

I want to automatically send birthday or anniversary messages to maintain relationships without manual tracking.

- [Insert your business type and tone: warm, professional, playful]
- A short birthday message template
- A short client-anniversary message template, if relevant to my business
- One tip for keeping this from feeling automated even though it is.

8. Deal Stage Notification Planner

ACT AS A SALES OPERATIONS CONSULTANT

I want my team notified automatically when an opportunity moves to a specific pipeline stage.

- [Insert your pipeline stages and who should be notified at each]
- Which stage changes are worth an automatic notification, and which aren't
- A short notification message template
- One risk of over-notifying the team, and how to avoid it.

9. Appointment Reminder Sequence

ACT AS A SCHEDULING CONSULTANT

I want to reduce no-shows with automated appointment reminders.

- [Insert your typical appointment lead time and channel: text, email, or both]
- A simple 2-touch reminder sequence with timing for each
- Short sample copy for each reminder
- One line about what to do if someone doesn't confirm.

10. Automated Review Request Writer

ACT AS A REPUTATION MANAGEMENT CONSULTANT

I want to automatically request a review after a successful project or service is completed.

- [Insert your business type and what triggers a completed job for you]
- A short review request message template
- The best timing to send it after completion
- One tip for making the ask feel personal, not automated.

Common Workflow Pitfalls to Avoid

The mistakes that trip up almost everyone building their first workflow, and how to sidestep them.

Forgetting to Add Filters

Without a filter, your workflow can trigger for the wrong form or event entirely.

Disabling Re-entry Too Soon

Keep Allow Re-entry on while testing, or repeat test submissions won't trigger anything.

Incorrect Merge Tags

Double-check dynamic fields by previewing or testing so they pull the right information.

Overly Complex Workflows

Start simple. Add complexity gradually as you get more comfortable with the system.

Skipping Execution Logs

Use Execution Logs to troubleshoot the moment a workflow isn't behaving as expected.

Not Testing End to End

A workflow that isn't tested with a real submission is a workflow you can't fully trust yet.

YOUR FIRST WORKFLOW ROLLOUT CHECKLIST

- ☐ Build your workflow with a Form Submitted trigger, filtered to your form.
- ☐ Add an internal notification so a new lead is never missed.
- ☐ Add a Create Opportunity action tied to your sales pipeline.
- ☐ Add a note with merge tags summarizing the form's responses.
- ☐ Submit a real test and confirm every action fired correctly.