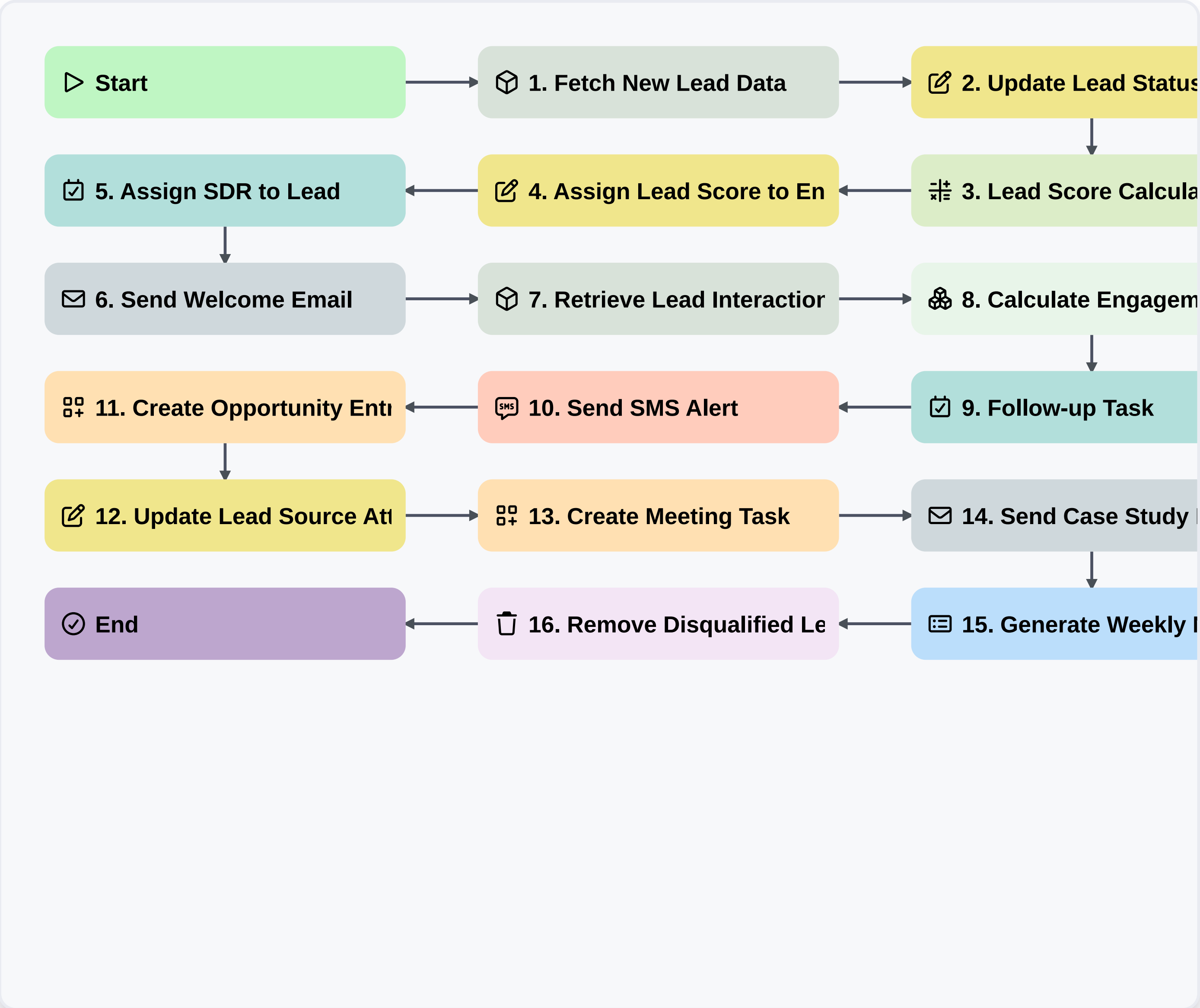
ChecklistGuro

B2B Lead Nurturing Process



Start
Start of the Workflow/Process.

1. Fetch New Lead Data
Retrieve new lead information from the 'Leads' data model after a form submission or import.

2. Update Lead Status
Change the lead status from 'New' to 'In Progress' once the nurturing process begins.

3. Lead Score Calculation
Calculate a lead score based on interaction frequency, company size, and industry variables.

4. Assign Lead Score to Entry
Update the Lead Data Model entry with the newly calculated score.

5. Assign SDR to Lead
Create a task for the Sales Development Representative to perform initial outreach.

6. Send Welcome Email
Send an automated personalized introduction email to the lead's email address.

7. Retrieve Lead Interaction History
Fetch all previous email opens and clicks from the 'Interactions' data model.

8. Calculate Engagement Rate
Sum the number of clicks and divide by total emails sent to determine engagement intensity.

9. Follow-up Task
Create a task for the SDR to call the lead if the engagement rate is above a certain threshold.

10. Send SMS Alert
Send a text message to the lead if they have expressed high interest via a web form.

11. Create Opportunity Entry
Create a new entry in the 'Opportunities' data model when a lead reaches a 'Qualified' state.

12. Update Lead Source Attribution
Update the lead entry to mark the marketing campaign responsible for the conversion.

13. Create Meeting Task
Create a task in the Sales Rep's calendar to conduct a discovery call.

14. Send Case Study Email
Send a targeted email containing relevant case studies based on the lead's industry.

15. Generate Weekly Nurturing Report
Create a report summarizing the conversion rate from 'Lead' to 'Opportunity' for the week.

16. Remove Disqualified Leads
Delete or archive lead entries that meet the 'Unqualified' criteria to keep the data model clean.

End
End of the Workflow/Process.