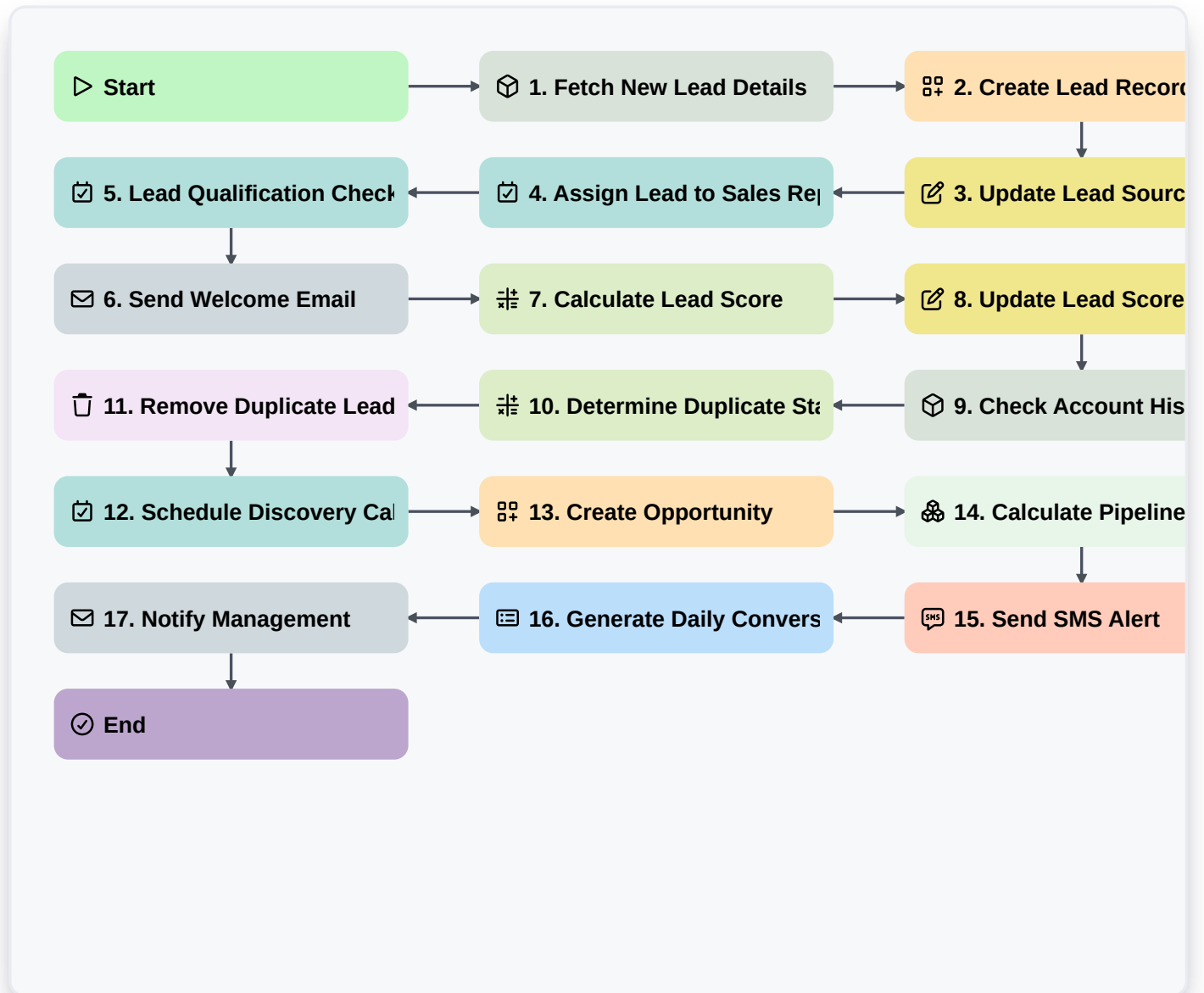


Lead Management And Conversion Workflow



► Start

Start of the Workflow/Process.

📦 1. Fetch New Lead Details

Retrieve incoming lead information from the Leads Data Model.

📊 2. Create Lead Record

Initialize a new entry in the Leads Data Model to track the new prospect.

✍️ 3. Update Lead Source

Update the lead entry with the specific attribution source (e.g., Web, Referral, Cold Call).

📋 4. Assign Lead to Sales Rep

Create a task for the assigned Sales Representative to perform initial outreach.

📋 5. Lead Qualification Checklist

Create a task containing a checklist to verify budget, authority, need, and timeline (BANT).

✉️ 6. Send Welcome Email

Send an automated introductory email to the lead's email address.

7. Calculate Lead Score

Calculate a score based on lead attributes like industry, company size, and engagement level.

8. Update Lead Score

Write the calculated score back into the Lead Data Model.

9. Check Account History

Get existing entries from the Accounts Data Model to see if the lead belongs to an existing client.

10. Determine Duplicate Status

Compare lead email/phone against existing records to identify duplicates.

11. Remove Duplicate Lead

Delete the redundant lead entry if a duplicate is identified.

12. Schedule Discovery Call

Create a follow-up task to schedule a meeting once the lead is qualified.

13. Create Opportunity

Create a new entry in the Opportunities Data Model once the lead reaches 'Qualified' status.

14. Calculate Pipeline Value

Aggregate the total potential revenue from all active opportunities in this stage.

15. Send SMS Alert

Send a text notification to the Sales Rep when a high-value lead is assigned.

16. Generate Daily Conversion Report

Create a report summarizing leads converted to opportunities during the last 24 hours.

17. Notify Management

Send an email to the Sales Manager when a 'Closed-Won' opportunity is detected.

End

End of the Workflow/Process.