



FM

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Premium Workflow

A practical guide – step by step

Automate Lead Qualification

Automatically score, enrich and route incoming leads to the right team – without manual sorting.

SALES & CRM

ADVANCED

ABOUT 1-2 HOURS SETUP

OVERVIEW

Automate Lead Qualification

Automatically score, enrich and route incoming leads to the right team – without manual sorting.

CATEGORY	DIFFICULTY	DURATION
Sales & CRM	Advanced	About 1–2 hours setup

What you use it for

Sales teams that need to prioritize incoming leads.

Tools in this workflow

Make · OpenAI API · Resend API · CRM

How to implement it

1

Capture leads via forms or webhooks

Integrate forms or webhooks into your website or applications to seamlessly transfer leads into your CRM system.

WHAT YOU NEED TO DO

1. Create a form on your website with fields for name, email, and company.
2. Configure a webhook in your CRM to receive incoming form data.
3. Test the form to ensure that the data is correctly sent to the CRM.

CHECK AT THE END

- ☐ The form is visible and functional on your website.
- ☐ The webhook receives data correctly in the CRM.

RESULT

Leads will be successfully captured through forms or webhooks.

2

Enrich company data and verify emails

Enhance your collected data by adding additional information and verify email addresses to create complete and reliable lead profiles.

WHAT YOU NEED TO DO

1. Set up the Resend API to validate email addresses.
2. Use the OpenAI API to generate additional company information.
3. Update lead data in CRM with enhanced information.

CHECK AT THE END

- ☐ Email addresses are validated and correct.
- ☐ Additional company information is updated in CRM.

RESULT

Lead profiles are enriched and emails verified.

3

Score leads with a language model

Evaluate leads using a language model powered by AI to precisely estimate sales opportunities based on various criteria.

WHAT YOU NEED TO DO

1. Set up the OpenAI API to perform lead scoring.
2. Define criteria for lead scoring in your CRM.
3. Run the scoring for each lead and store the results in your CRM.

CHECK AT THE END

- ☐ Lead scoring criteria are defined in your CRM.
- ☐ Scoring results are stored in your CRM.

RESULT

Leads are evaluated and sales opportunities are estimated.

4

Route them to the right team

Automatically route evaluated leads to the responsible sales team based on predefined rules in CRM.

WHAT YOU NEED TO DO

1. Define routing rules in CRM based on lead score.
2. Configure CRM to automatically assign leads.
3. Verify assignment to ensure leads are correctly routed.

CHECK AT THE END

- ☐ Routing rules are defined in CRM.
- ☐ Leads are correctly routed to the right team.

RESULT

Evaluated leads are routed to the correct sales team.

5

Send personalized emails

Automatically send personalized emails to assigned leads tailored to their interests and needs.

WHAT YOU NEED TO DO

1. Create email templates in CRM for different lead types.
2. Configure the Resend API to send emails.
3. Automate email sending based on lead assignment.

CHECK AT THE END

- ☐ Email templates are created and configured in CRM.
- ☐ Emails are sent correctly and personalized.

RESULT

Personalized emails are sent to assigned leads.

RECOMMENDED TOOLS & RESOURCES

Recommended Tools & Resources

All tools in this workflow with their official website.

Make

<https://www.make.com/en/register?ref=flowmatrix>

Official URL

OpenAI API

<https://platform.openai.com/?ref=flowmatrix>

Official URL

Resend API

<https://resend.com/?ref=flowmatrix>

Official URL

CRM

<https://www.hubspot.com/products/crm>

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