

Lead Generation Workflow for Small Businesses

A Comprehensive Step-by-Step Guide



Lead Capture Setup



Lead Research & Enrichment



CRM Setup & Management



Email Sequence Creation



Automation Setup

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Lead Generation Workflow

A 5-Step Process for Building an Effective Lead Generation System

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This comprehensive workflow leverages free and low-cost tools to help small businesses and startups capture, research, manage, nurture, and automate their lead generation process.

1  **Lead Capture Setup**

2  **Lead Research and Enrichment**

3  **CRM Setup and Management**

4  **Email Sequence Creation**

5  **Automation Setup**

Lead Capture Setup

Step 1: Create effective landing pages and capture forms



Tools



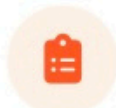
AHA Innovations

Landing pages & capture forms
(\$5 lifetime)



Mailchimp

Email capture forms (free tier)



Tally

Simple form creation (free)



Canva

Design attractive lead magnets

Process

- 1 Create valuable lead magnets (ebooks, checklists, templates)
- 2 Design landing pages with clear value proposition
- 3 Set up opt-in forms with minimal fields
- 4 Create thank you pages and initial engagement sequence

Property Value

Select One

Loan Amount

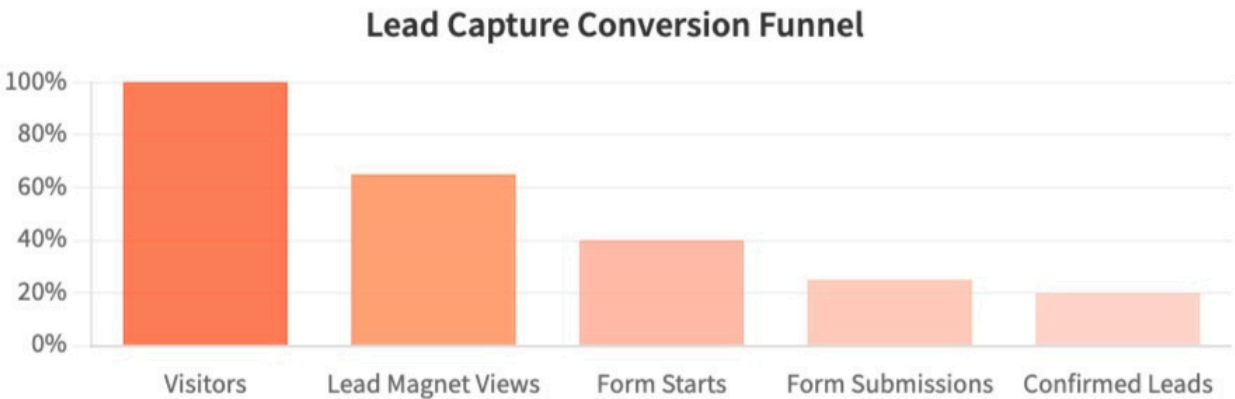
Select One

First Name

Last Name

Email

Phone



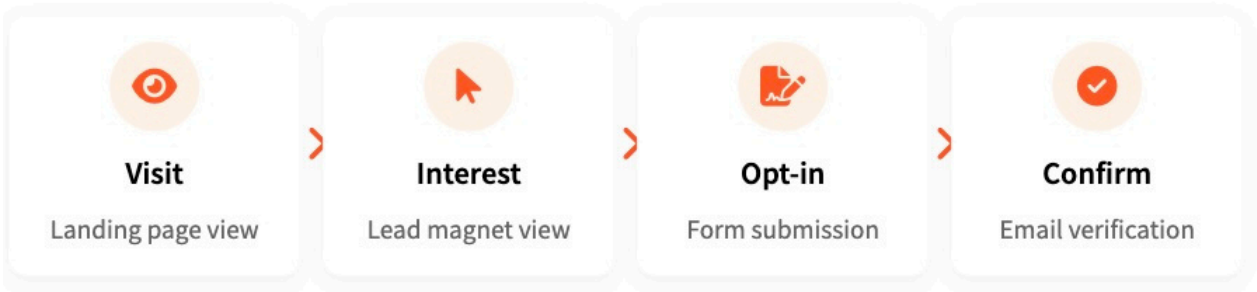
Ebooks

Checklists

Templates

Webinars

Cheat Sheets



Lead Research and Enrichment

Step 2: Enhance lead data with valuable insights

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Tools



Hunter.io

Find email addresses (free tier)



Clearbit Connect

Enrich lead data (free tier)



LinkedIn

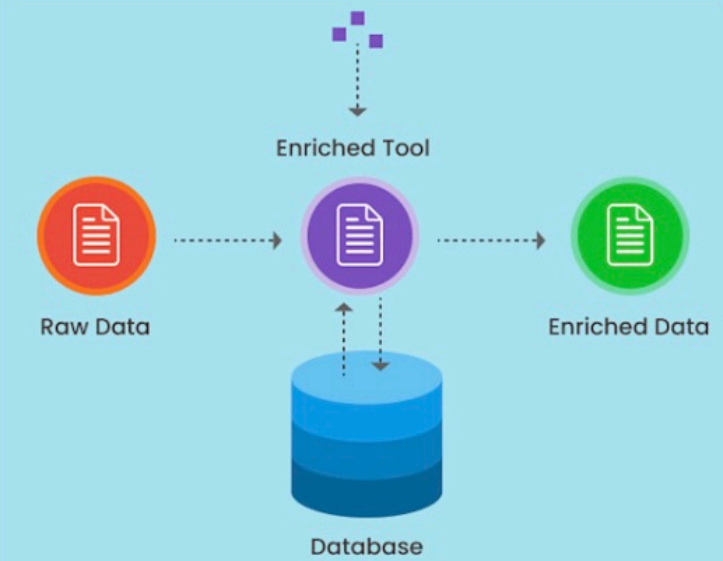
Research leads and companies

Process

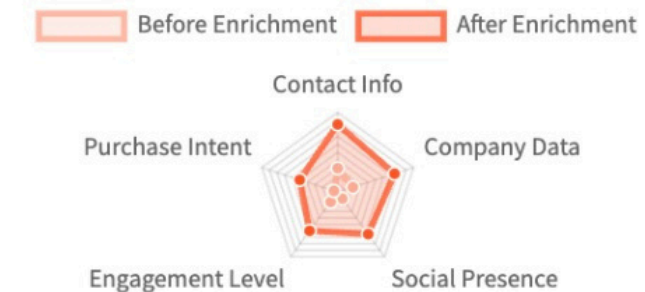
- 1 Research captured leads for additional context
- 2 Enrich lead data with relevant information
- 3 Segment leads based on characteristics
- 4 Prepare for personalized outreach

Data Enrichment

leadfeeder



Lead Data Enrichment Impact



Basic Info

Contact Details

Company Data

Social Profiles

Behavioral Data



Capture

Initial lead data



Research

Find additional info



Enrich

Add to database



Segment

Categorize leads

CRM Setup and Management

Step 3: Organize and manage your customer relationships

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Tools



AHA Innovations

Manage leads & relationships (\$5 lifetime)



HubSpot CRM

Basic CRM functionality (free tier)



Notion

Simple CRM setup for small teams

Process

- 1 Set up CRM with custom fields for your business
- 2 Create lead stages and pipeline
- 3 Import and organize captured leads
- 4 Set up tagging and segmentation system

CRM Project Dashboard

Navigation

New Client New Project New Company New Meeting
Contacts Projects Companies Meetings

Projects

Gallery

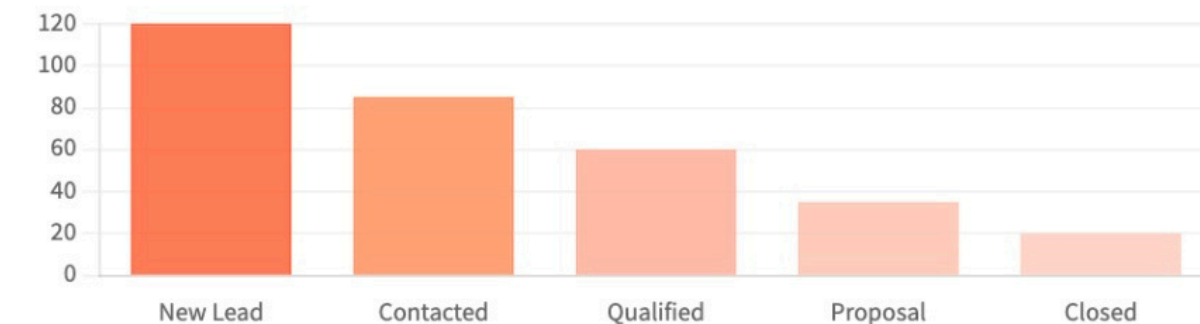
Web Design May 1, 2023 → June 1, 2023 In progress Edward Work in progress	Adsense Collaboration Not started Andrew In Contact	Shoe Design Not started Ali Potential Client	Increase Twitter followers Not started David Lead
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Clients & Contacts

Client Pipeline Archived

Potential Client: 1	Lead: 1	In Contact: 1	Deal Done: 0	Work In progress: 1	Work In review: 0	Work Completed
All CEO	David Twitter Lead Client	Andrew Manager		Edward CEO		

Lead Pipeline Distribution



Contact Management

Lead Tracking

Pipeline Visualization

Activity History

Custom Fields



Setup

Configure CRM



Import

Add leads



Tag

Categorize



Pipeline

Track progress

Email Sequence Creation

Step 4: Craft effective automated email campaigns

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Tools



ChatGPT

Draft email sequences and templates



AHA Innovations

Create email automation (\$5 lifetime)



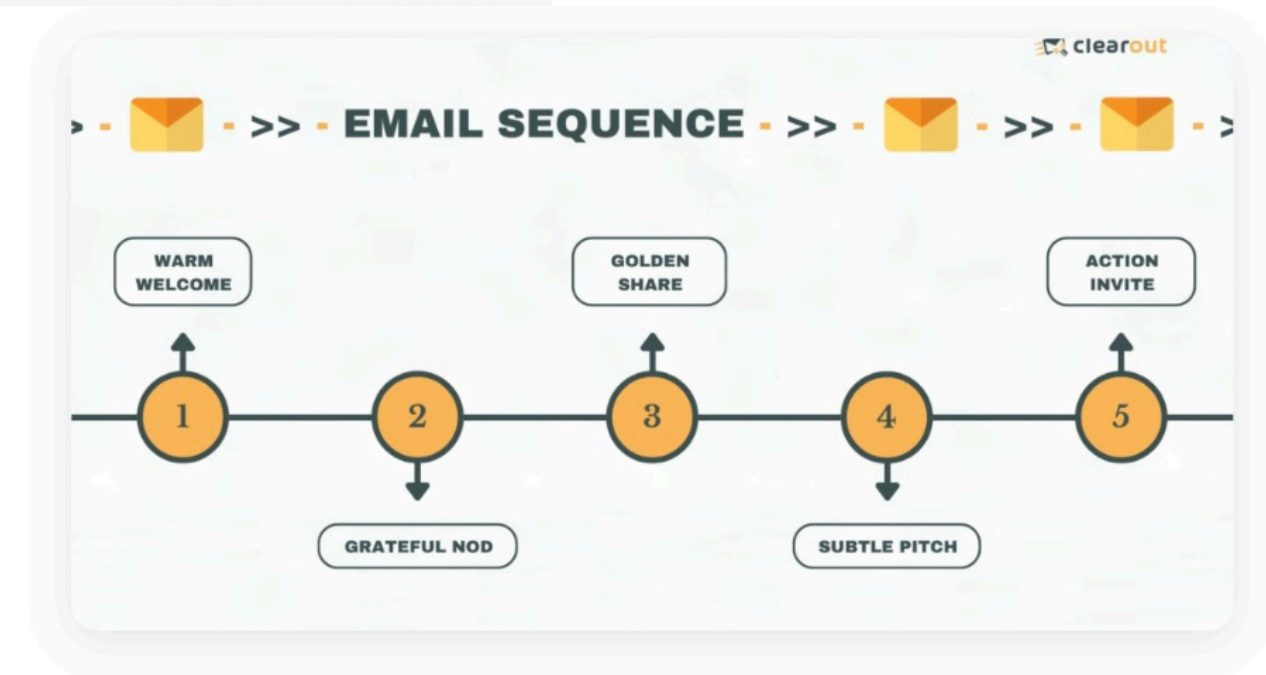
Mailchimp

Email marketing automation (free tier)



Process

- 1 Develop email welcome sequence
- 2 Create nurture sequence with valuable content
- 3 Write promotional emails with clear CTAs
- 4 Set up engagement-based triggers



Email Sequence Performance Over Time



Welcome Emails

Nurture Content

Promotional

Follow-up

Re-engagement



Plan

Define goals & audience



Create

Write compelling content



Automate

Set triggers & timing



Analyze

Track performance

Automation Setup

Step 5: Streamline your lead generation with automated workflows

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Tools



AHA Innovations

Marketing automation (\$5 lifetime)



Zapier

Connect tools & automate workflows (free tier)

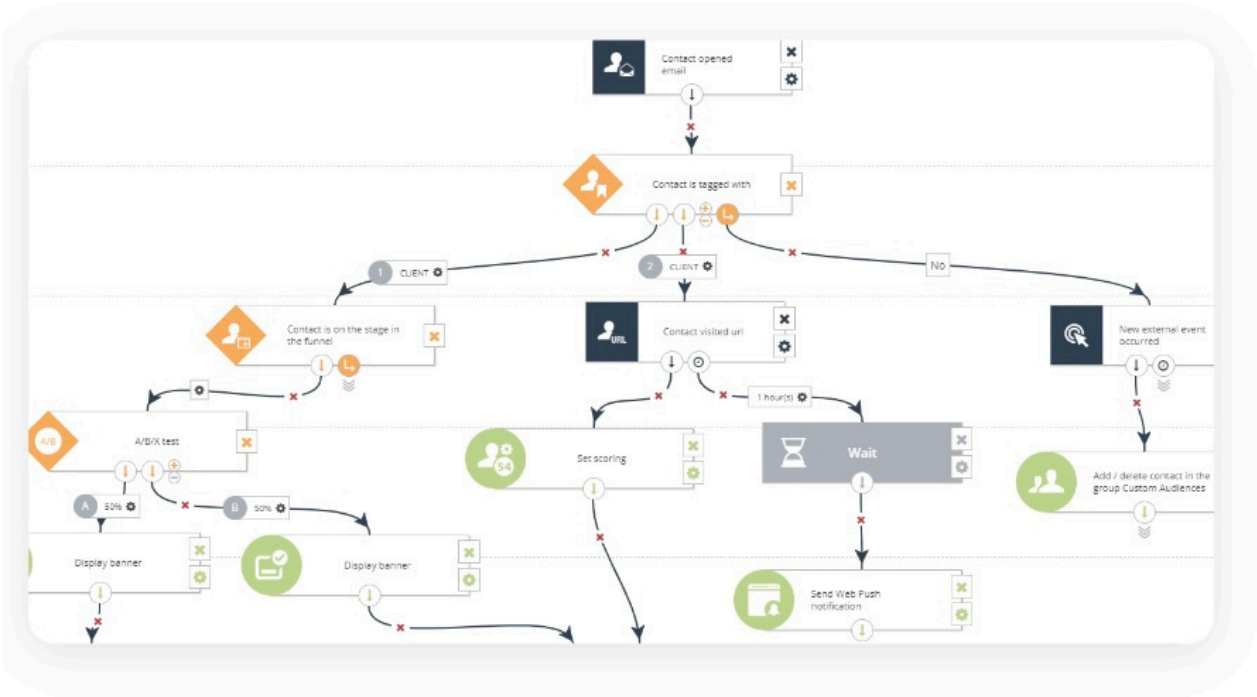


Make (Integromat)

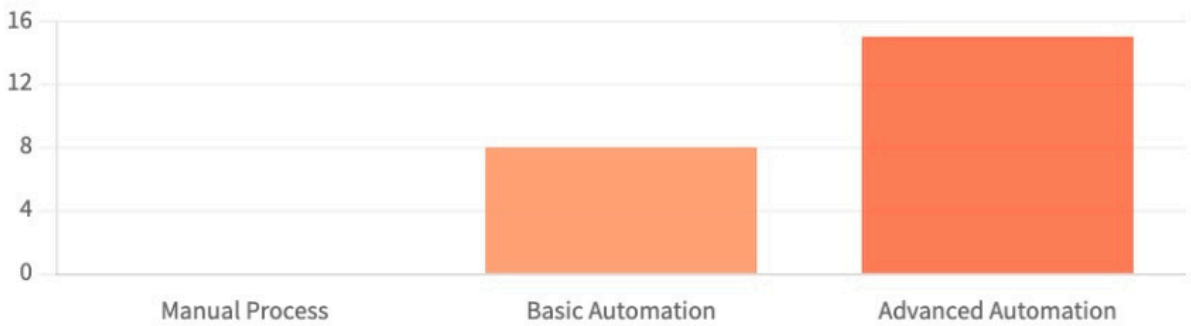
Advanced automation (free tier)

Process

- 1 Create automation for lead delivery
- 2 Set up email sequences based on actions
- 3 Create lead scoring system
- 4 Set up notifications for lead engagement



Automation Efficiency Impact



- Time Saving
- Consistency
- Personalization
- Scalability
- Efficiency



Connect

Link your tools



Configure

Set triggers & actions



Activate

Launch automation



Monitor

Track performance

Key Takeaways

Maximize your lead generation efficiency with this 5-step workflow

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Increased Efficiency

- Save 15+ hours weekly with automation
- Streamline lead capture process
- Reduce manual data entry



Better Targeting

- Enrich lead data for personalization
- Segment leads by behavior & interest
- Improve conversion rates



Cost Effective

- Leverage free & low-cost tools
- Reduce software expenses
- Maximize ROI on lead gen



Scalability

- Grow without adding staff
- Handle increased lead volume
- Maintain consistent quality



Your 5-Step Lead Generation Workflow

1



Lead Capture Setup

2



Lead Research & Enrichment

3



CRM Setup & Management

4



Email Sequence Creation

5



Automation Setup