Solution Overview: Lead Response & CRM Automation

What It Does

This automation helps you respond to new client inquiries instantly by generating a personalized contract and sending it to the lead, without manual input. It replaces back-and-forth emails and speeds up your client onboarding process.

How It Works

1. **New Lead Captured**A potential client fills out a form or sends an inquiry. Their details are recorded automatically.

2. **Workflow Triggered**The system recognizes a new lead and starts the contract creation process.
3. **Contract Generated**A custom contract is prepared using the client's information, no copy-pasting needed.
4. **Contract Sent to Client**The client receives the contract by email and can review or sign it immediately.
5. **Status Tracked & Follow-Up Scheduled**Once the contract is signed, the system updates the lead status and prepares for the next step in your workflow.

Key Benefits

- **Time-Saving**: No more manual document creation
- **Professional**: Consistent, error-free communication
- **Fast Response**: Impress leads by replying in minutes, not days
- **Scalable**: Works whether you handle 5 leads a week or 50