AI Automation Agency

Automated referral system

1 make

CRM-Automation Integration

Connect Salesforce CRM with Make. Trigger referral flow in Make when a customer's status in Salesforce is marked "Completed."

2

Referral Flow

Use Make to gather customer data from Salesforce. Create personalized referral prompts with AI tools like Jasper or ChatGPT.

3

Follow-up

If no initial response, follow up for 7-14 days using new AI-generated messages.

4

Lead Handling

Notify sales reps automatically about new referrals for warm introductions.

5

Tracking and Improving

Monitor referral outcomes and adjust strategies for better results.

How To Build AI Automation Agency Without Paid Ads BATCH37 7

Michael Hoelscher

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