

Lead qualification and follow-up automation

Automatically captures boat buyer leads, scores them based on purchase intent and budget, then executes personalized follow-up sequences to nurture qualified prospects toward boat sales appointments.

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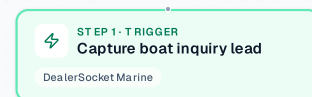


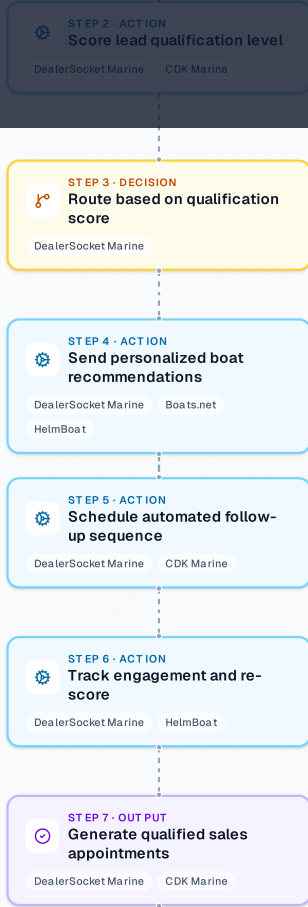
WORKFLOW TRIGGER

Website visitor submits boat inquiry form or responds to boat listing advertisement

Visual Flow

Each node represents an automated step. Connections show how data and decisions move through the workflow.





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Step-by-Step Breakdown

Detailed explanation of each automated stage in the workflow.

1

⚡ TRIGGER

Capture boat inquiry lead

New lead data is automatically captured when prospect fills out boat interest form or clicks on boat listing. Lead information includes boat type preference, budget range, and contact details.

2

 ACTION

Score lead qualification level

System analyzes lead data including stated budget, boat type interest, timeline, and financing needs to assign qualification score. Higher scores indicate more purchase-ready prospects.

DealerSocket Marine

CDK Marine

3

 DECISION

Route based on qualification score

Workflow branches based on lead score - high-qualified leads get immediate sales team notification while lower-qualified leads enter automated nurture sequence.

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4

 ACTION

Send personalized boat recommendations

System automatically generates and sends customized boat suggestions based on prospect's stated preferences, budget, and available inventory. Includes relevant boat specifications and pricing.

DealerSocket Marine

Boats.net

HelmBoat

5

 ACTION

Schedule automated follow-up sequence

Multi-touch email and SMS campaign is triggered with boat care tips, financing information, and inventory updates. Follow-up frequency adjusts based on prospect engagement levels.

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CDK Marine

6

 ACTION

Track engagement and re-score

System monitors email opens, link clicks, and website visits to update lead qualification score. High-engagement prospects get prioritized for sales team outreach.

DealerSocket Marine

HelmBoat

7

 OUTPUT

Generate qualified sales appointments

Fully qualified and engaged leads are automatically scheduled for sales consultations with appropriate sales team members. Lead history and preferences are transferred to sales staff.

DealerSocket Marine

CDK Marine



Outputs

- Qualified sales appointments scheduled

- Lead scoring and prioritization data

AI Business OS

Personalized follow-up campaigns executed



Key Metrics

- Lead qualification rate
- Lead-to-appointment conversion rate
- Average lead response time



Tools & Integrations

- DealerSocket Marine
- CDK Marine
- Boats.net
- HelmBoat

AI Business OS

Actionable AI implementation strategies for business leaders ready to transform their operations.

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