

Zapier Customer Lead Automation

Client: Mid-market SaaS company seeking to scale lead management without adding headcount

Objective: Transform manual lead capture into an intelligent automation system that converts freemium users and trial signups into qualified sales opportunities.

Tech Stack: Zapier, Typeform, HubSpot CRM, Mailchimp, Telegram

The SaaS Challenge

SaaS companies face unique lead management complexities:

- **High-volume, low-touch leads** from freemium signups requiring intelligent qualification
- **Product usage data** needing integration with traditional lead scoring
- **Multiple conversion paths** (trial → paid, freemium → premium, demo requests)
- **Rapid scaling demands** without proportional team growth

1. Intelligent Lead Capture & Scoring

- **Multi-source Integration:** Product analytics, website forms, and demo requests unified

2. Smart CRM Orchestration

- **HubSpot Automation:** Custom properties for SaaS metrics

3. Context-Aware Team Notifications

- **Telegram Alerts:** Rich notifications with lead score, company profile, and recommended actions
- **Role-based Routing:** Technical leads → product team, enterprise inquiries → sales, support issues → success team
- **Urgency Indicators:** High-value prospects (enterprise trials, competitor switches) get immediate escalation

4. Behavioral Email Sequences

- **Mailchimp Automation:** Triggered campaigns based on trial behavior, feature usage, and engagement level
- **Conversion Optimization:** Time-sensitive offers and social proof for trial-to-paid conversion

SaaS-Specific Innovation

Product-Led Growth Integration:

- Trial usage patterns trigger personalized sales outreach
- Feature adoption scores determine email sequence selection
- Expansion opportunity identification based on usage limits

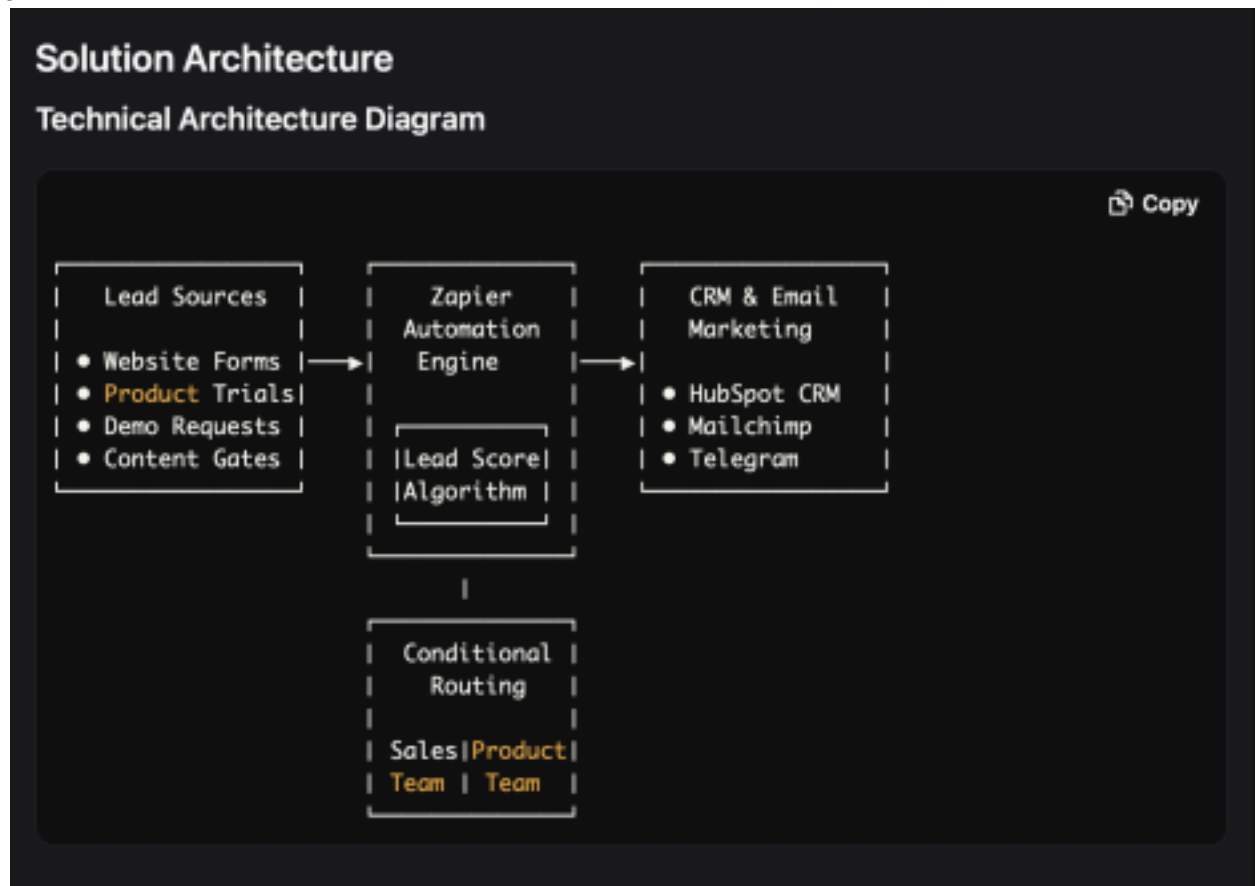
Competitive Intelligence:

- Automated detection of competitor mentions in forms

Scalable Architecture:

- **Zero-code solution** enabling rapid iteration by growth teams
- **Webhook-based integrations** for real-time product data sync
- **A/B testing framework** for continuous conversion optimization
- **Multi-tenant support** for handling diverse customer segments

This automation demonstrates mastery of SaaS growth mechanics, revenue operations, and scalable system design while delivering measurable impact on both efficiency and revenue generation.



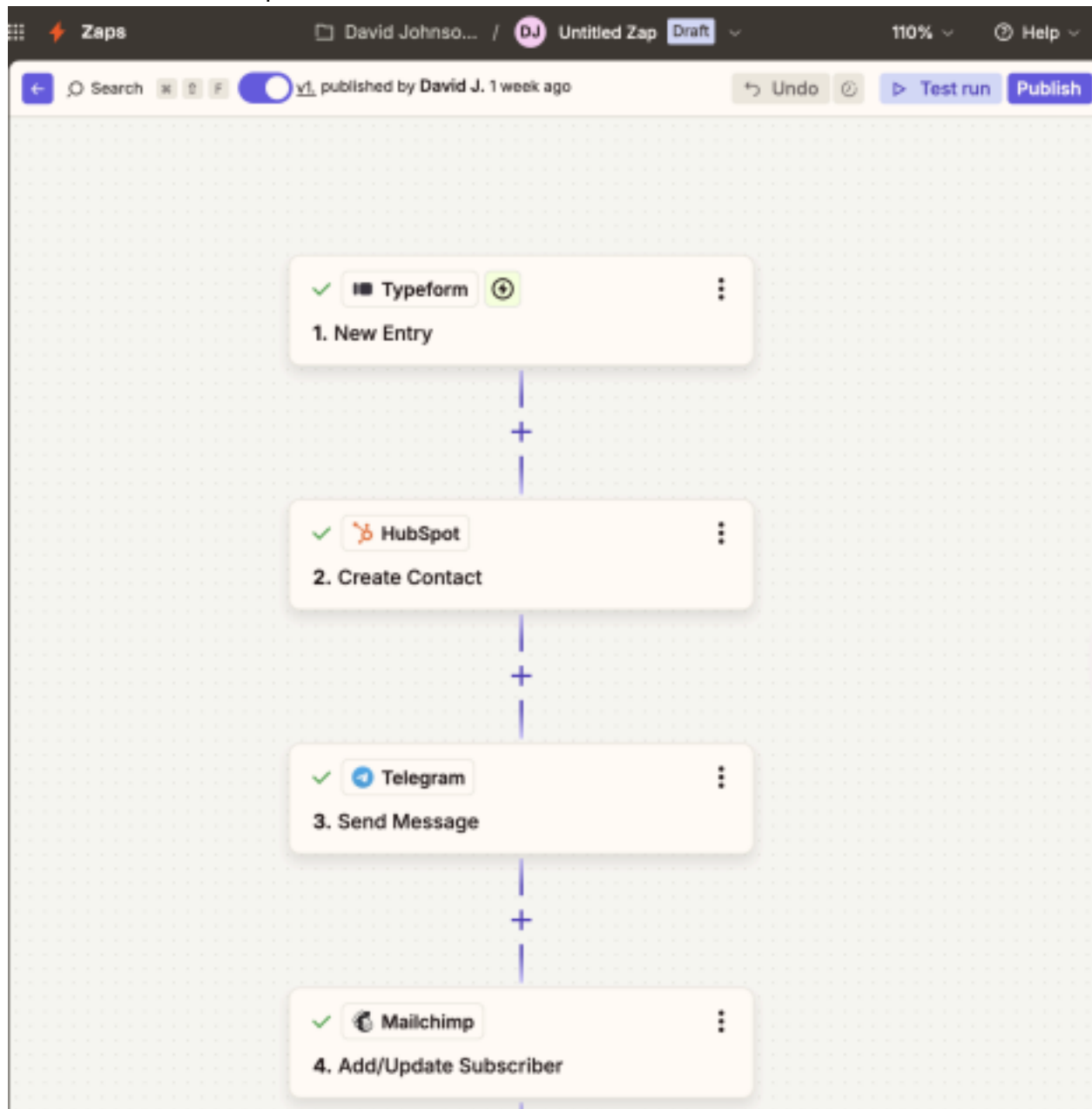
Pre-Build Checklist

Tools We'll Connect:

- Form builder (Typeform)
- Email marketing platform (Mailchimp,
- CRM (HubSpot,)
- Communication tool (Slack, Discord, or Telegram)
- n8n or Zapier account

Information You'll Need:

- Your website/landing page URL
- Email list/audience you want to add leads to
- CRM pipeline or database structure
- Team notification preferences



Zapier Template

Form Builder step

To submit the form on customer information

App *

Typeform

Change

Trigger event *

New Entry

Search events

New Entry

Instant

Triggers when a form is submitted.

[manage all of your connected accounts here.](#)

<https://form.typeform.com/to/BkKQDxGV>

Link to form

HubSpot : to create the contact and store it in the database

2. Create Contact

Setup > Configure > Test

App *

HubSpot

Change

Action event *

Create Contact

Account *

HubSpot Hub: 146593101

Used in 1 Zap

Change

HubSpot is a secure partner with Zapier. [Your credentials are encrypted and can be removed at any time.](#) You can [manage all of your connected accounts here.](#)

Telegram to notify team of stored contact



3. Send Message



Next: Step 4



Setup  > Configure  > Test 

App *



Telegram

Change

Action event *

Send Message



Account *

Telegram AgentBot (@AgentListbot)

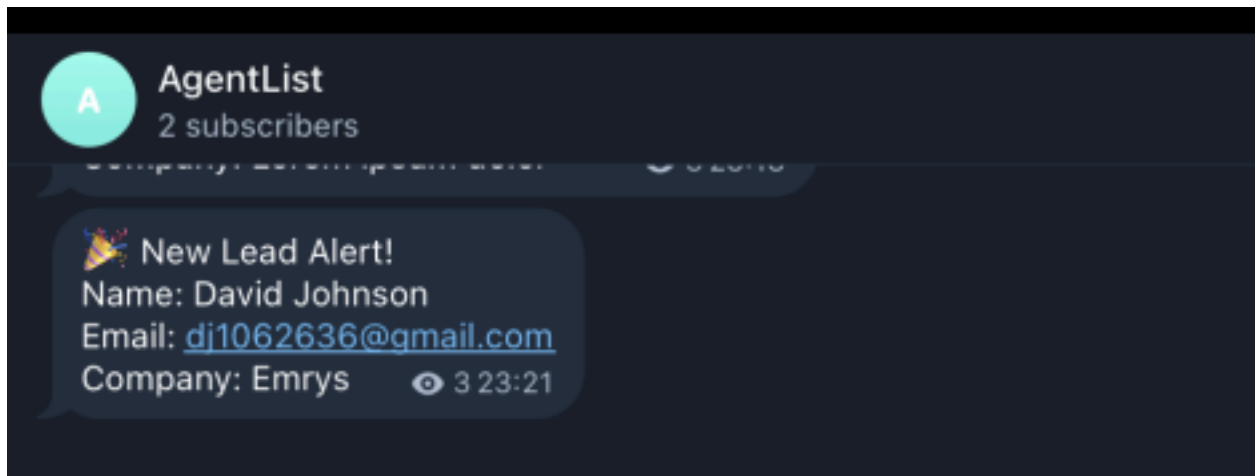
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Continue



Sample Notification

To Add/Update subscriber to Email Marketing Platform MailChimp



4. Add/Update Subscriber



Next step



Setup  > Configure  > Test 

App *



Mailchimp

Change

Action event *

Add/Update Subscriber



Account *

Mailchimp davesg_

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