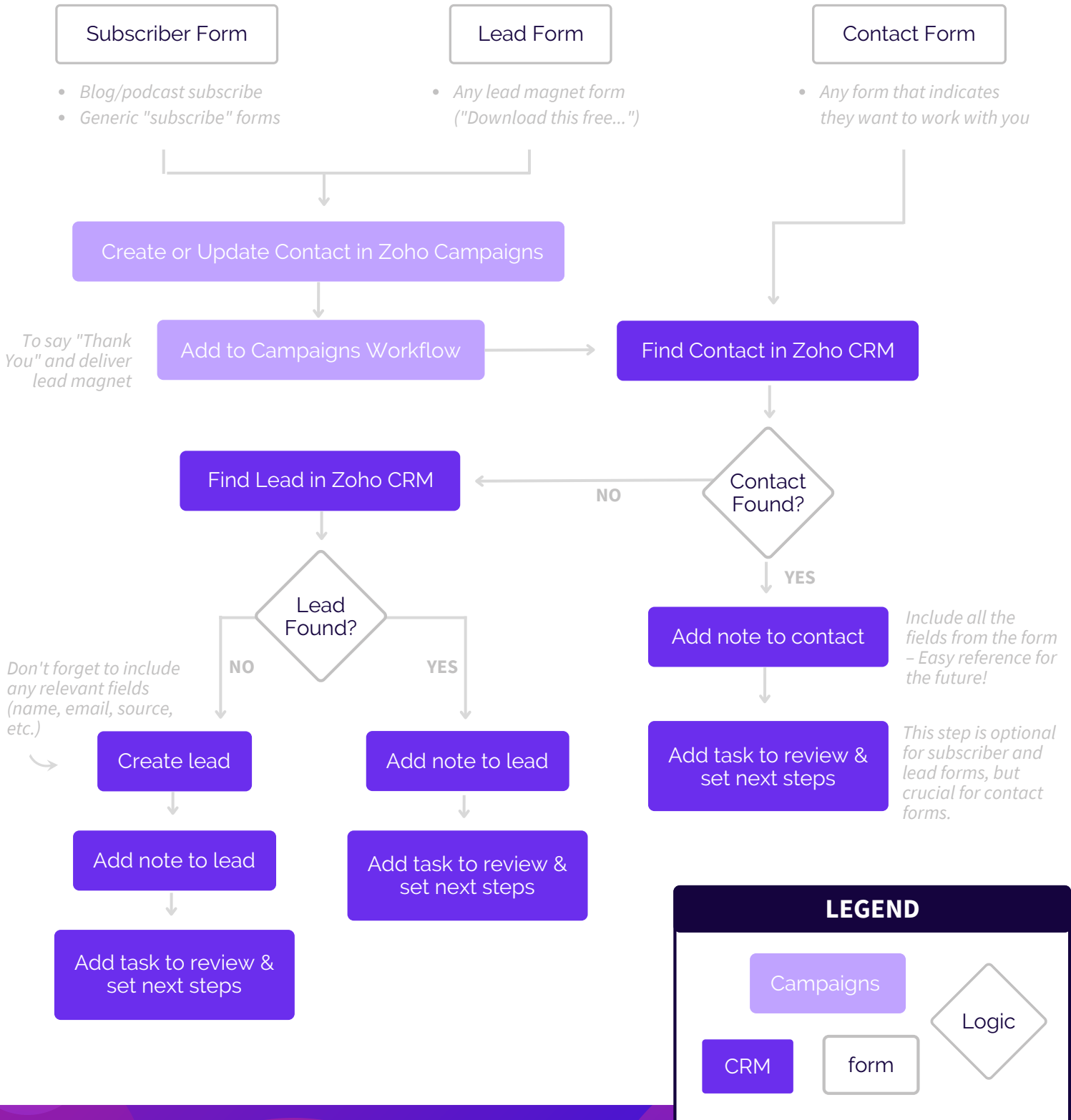# BEST PRACTICES FOR WEBSITE
FORM AUTOMATION

The following automation is designed around the Zoho One ecosystem – which you'll use if you're a SpeakerFlow CRM customer – but the general "flow" can be used with any set of CRM, email marketing, and automation apps.

Subscriber Form
- Blog/podcast subscribe
- Generic "subscribe" forms

Lead Form
- Any lead magnet form ("Download this free...")

Contact Form
- Any form that indicates they want to work with you

Create or Update Contact in Zoho Campaigns

To say "Thank You" and deliver lead magnet

Add to Campaigns Workflow

Find Contact in Zoho CRM

Find Lead in Zoho CRM

Contact Found? — NO

Lead Found?

Don't forget to include any relevant fields (name, email, source, etc.)

Create lead — NO

Add note to lead — YES

Add note to lead

Add task to review & set next steps

Add task to review & set next steps

YES

Add note to contact

Include all the fields from the form – Easy reference for the future!

Add task to review & set next steps

This step is optional for subscriber and lead forms, but crucial for contact forms.

LEGEND

- Campaigns
- CRM
- form
- Logic

SPEAKERFLOW

Questions or Comments?

Contact us at
hello@speakerflow.com
and let us know what you
think!