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FREE TUTORIAL

# Einstein Lead Follow-Up Is Salesforce's AI Sales Rep, and You Can Copy the Useful Part in Gmail

Einstein lead follow-up is Salesforce's AI agent that emails new leads, answers their questions and keeps chasing until they reply or go cold. Salesforce now sells it under the Agentforce name. If you get a handful of leads a week, you can build the part that matters in Gmail this afternoon.

WHAT THIS ADDS

What makes Salesforce's agent useful is not the AI writing. It stops chasing the moment a lead replies. In Gmail, the obvious tool for follow-ups, Schedule send, does the opposite and will email someone who already booked you. Snooze gets you stop-on-reply for free.

## What Einstein lead follow-up is, and what you will have by the end

"Einstein" was Salesforce's brand for its AI features. The lead follow-up piece people search for began as the Einstein SDR Agent. SDR stands for sales development rep, the junior salesperson whose whole job is answering and chasing new leads. Salesforce now calls it Agentforce Sales Development. It reads a new lead, emails them, answers questions using your company information, handles common objections, tries to book a meeting, and hands the conversation to a person when it should.

Two things it is **not**:

- **It is not Einstein Lead Scoring.** Lead Scoring ranks your leads by how likely they are to buy. It never sends anyone anything. Many people mix the two up.
- **It is not included in a basic Salesforce subscription.** It is aimed at Salesforce's larger editions, and Agentforce usage is billed on top of the license. Check Salesforce's Agentforce pricing page for the current terms before you plan around it.

It was built for sales teams handling hundreds of inbound leads, where no human can reply to all of them within the hour. A wedding photographer, a body shop or a physio clinic has a different problem. You have few enough leads to answer each one yourself. You just forget the second and third follow-up.

**By the end of this tutorial you will have:** every new enquiry labeled automatically in Gmail, three ready-made follow-up messages, a reminder that brings each unanswered lead back to you on the right day, and that stops by itself if the lead replies. You will also have a ten-minute routine for twice a week.

**Before you start you need:** a Gmail or Google Workspace account that your enquiries arrive in, one example enquiry email from your website form, and about 30 minutes. For when to follow up and how many times, see our guide to what lead follow-up actually means. This tutorial only covers the setup.




The five-step lead follow-up setup in Gmail, about 30 minutes start to finish

## Step 1: Turn on Gmail's follow-up nudges

Gmail can already spot emails you sent that never got a reply. This setting is off for some accounts.

1. In Gmail on a computer, click the **gear icon** at the top right, then **See all settings**.
2. Stay on the **General** tab and scroll to **Nudges**.
3. Tick **Suggest emails to reply to** and **Suggest emails to follow up on**.
4. Scroll to the bottom and click **Save Changes**.

Nudges are a safety net, not the system. Gmail decides on its own which emails to nudge, and it skips plenty. The next steps make sure nothing depends on its guess.

## Step 2: Label every new lead automatically

Open your example enquiry email and look at two things: the sender address and the subject line. Most form tools send from the same address with the same subject every time, for example "New form submission" or "New booking request".

1. In the Gmail search bar, click the **Show search options** icon (the sliders at the right end of the bar).
2. Put the exact subject in the **Subject** field. If the sender address never changes, put it in **From** instead. It is the more reliable match.
3. Click **Create filter**.
4. Tick **Apply the label**, open **Choose label**, pick **New label**, type `Leads` and click **Create**.
5. Tick **Never send it to Spam**. Form emails get caught by spam filters more often than you would expect.
6. Tick **Also apply filter to matching conversations** so old enquiries get labeled too, then click **Create filter**.

Make a second label called `Leads/Closed` the same way (Settings, **Labels** tab, **Create new label**, nest it under Leads). You will move finished conversations there, won or lost, so the main Leads label only holds people you are still waiting on.

If enquiries also reach you by direct email, add the Leads label to those by hand as they come in. It takes one click.

## Step 3: Write your three follow-up templates

Templates mean the second and third follow-up take ten seconds, so you actually send them.

1. Go to **Settings** (gear icon), **See all settings**, then the **Advanced** tab.
2. Next to **Templates**, choose **Enable**, then click **Save Changes** at the bottom. Gmail reloads.
3. Click **Compose** and write the first follow-up.
4. Click the **three dots** (More options) at the bottom of the draft, then **Templates**, **Save draft as template**, **Save as new template**, and give it a name you will recognize, such as "Lead FU1".
5. Repeat for the other two.

Here is what the three look like for an example business. Maya is a wedding photographer whose full-day package is $2,800:

- **Lead FU1 (two days after your first reply):** "Hi [name], just checking my note about your [date] wedding reached you. That Saturday is still open. Want me to hold it for you for 48 hours?"
- **Lead FU2 (five days later):** "Hi [name], a quick one. Most couples ask me about the second shooter and the album at this stage, so I have attached the full price list. Happy to jump on a 15-minute call if that is easier."
- **Lead FU3 (a week after that, the last one):** "Hi [name], I will assume the timing is not right and close this out for now. If anything changes, just reply to this email and I will pick it straight back up."

Gmail templates have no merge fields, so you type the name and date in yourself. That is fine at this volume, and it stops the message reading like a mass email. Each message asks one question, and the last one politely closes the conversation. That closing message often gets more replies than the other two.

## Step 4: Reply, then snooze instead of scheduling

This is the step most people get wrong. The obvious move is to write all three follow-ups now and use **Schedule send** (the arrow beside the Send button). **Do not do that.** A scheduled email goes out whether or not the lead has replied in the meantime. Picture a client who booked on Tuesday and gets your "I will assume the timing is not right" email on Friday.

Use **Snooze** instead. A snoozed conversation disappears from your inbox until the date you pick. If the lead replies before then, it comes back at once. That gives you stop-on-reply, the thing Salesforce's agent does, for free.

1. Reply to the new enquiry as soon as you can, by hand. Speed matters far more than polish.
2. Open that conversation and click the **clock icon** (Snooze) in the toolbar above it.
3. Choose **Pick date & time** and set it two days out, at a time you are usually at your desk.
4. When the conversation comes back with no reply, open it, click **Reply**, then the three dots, **Templates**, and insert "Lead FU1". Fill in the name, send, and snooze again for five days.

5. Repeat with FU2, then FU3. After FU3 with no answer, remove the Leads label, add `Leads/Closed`, and archive.

When a lead does reply, the conversation is back in your inbox and the chasing stops by itself. Answer them, and once they book or say no, move the thread to `Leads/Closed`.

## Step 5: Run a ten-minute sweep twice a week

Snooze handles the timing. The sweep catches anything that slipped past it: a lead you replied to on your phone and forgot to snooze, or one that arrived while you were away.

1. Click the **Leads** label in the left sidebar. Everything here should be either snoozed or waiting on your reply.
2. Type `label:leads older_than:2d` in the search bar. Any conversation in this list that is *not* snoozed is a lead nobody is chasing. Snooze it or close it now.
3. Click **Snoozed** in the left sidebar to see what is coming back this week, so a busy Thursday does not catch you out.

Monday morning and Thursday afternoon suit most small businesses. Write the sweep into your calendar as a repeating event. If it lives only in your head, it will be the first thing to slip in a busy week.

If you want every lead's history in one place, not just their emails, that is a customer database's job. The best customer database is the one that fills itself in covers what to look for.

## If it does not work

### New enquiries are not getting the Leads label

This is nearly always the filter matching on the wrong thing. Some form tools change the subject line by adding the person's name or a submission number, so an exact subject match fails. Open two recent enquiries side by side. If the subject differs, edit the filter (Settings, **Filters and Blocked Addresses**, **edit**) to match on the **From** address instead. You can also put only the unchanging part of the subject in the Subject field. Also check you ticked **Also apply filter to matching conversations**. Without it, the filter only touches mail that arrives after you create it.

### A lead got a follow-up after they had already replied

Either a Schedule send slipped in, or the reply landed in a different thread. To check for scheduled emails, click **Scheduled** in the left sidebar and cancel anything addressed to a lead. If the lead replied from a different email address, or wrote a fresh email instead of replying, Gmail treats it as a new conversation. The snoozed thread then never wakes up. Before you send any follow-up, search Gmail for the lead's name, not only their address. It takes five seconds and saves the awkward email.

One more thing to check: if the **Templates** option is missing from the three-dot menu, you enabled templates but did not click **Save Changes**. Go back to the Advanced tab and save.

## When Salesforce's version is worth paying for, and when it is not

The Gmail setup has a ceiling. You still write the first reply yourself, and the system only works if you open your inbox. Past roughly a few dozen enquiries a week, or with several people sharing leads, the manual parts start to fail. That is the point where an automated agent earns its cost.

If your business already runs on Salesforce at the edition Agentforce requires, and enquiries regularly sit unanswered for hours, Agentforce Sales Development is a reasonable thing to trial. Price it on Salesforce's own pricing page against what one lost booking costs you. A business that does not already use Salesforce should not adopt it for this feature alone. The setup and the license are built for a sales department.

There is also a middle option: software that sends the follow-up emails for you on a timer and stops when the lead replies, without an AI agent writing to your customers. Client management software generally does this. Fynl is one example. Its automations send from your connected Gmail and stop when the lead replies, at $49 a month. It does not text or call leads, so if your customers expect an SMS, pick a tool that does.

| | Agentforce Sales Development | Gmail (or Fynl) |
|---|---|---|
| Who writes the first reply | The AI agent, using your c | You, by hand |
| Stops when the lead replies | Yes | Yes, if you use Snooze, no |
| Cost | Salesforce license plus Ag | Included with Gmail |
| Setup | Salesforce admin work and | About 30 minutes |
| Best fit | Sales teams with hundreds | Owner-run businesses wit |

Salesforce's AI follow-up agent versus the Gmail setup in this tutorial

DO THIS

If you are not already on a large Salesforce plan, skip the AI agent. Spend 30 minutes setting up a Leads label, three templates and the reply-then-snooze routine in Gmail, and put a twice-weekly sweep in your calendar.

## Sources


- Salesforce: Agentforce overview — https://www.salesforce.com/agentforce/
- Salesforce: Agentforce pricing — https://www.salesforce.com/agentforce/pricing/
- Gmail Help: Snooze emails until later — https://support.google.com/mail/answer/7622010
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