# Make.com: How to automatically send a personalized welcome email and alert your team in Slack the exact second a new lead fills out your website form — Quick Start Guide

## 1. Set Up Your Form Webhook to Capture Lead Data

Navigate to Make.com and create a new scenario by clicking the "+ Create a new scenario" button. Add a "Webhooks" module as your first trigger by searching "webhook" in the app directory and selecting "Custom Webhook." Click "Add" next to the webhook URL field to generate a unique URL. Copy this webhook URL and paste it into your website form's action URL or configure it in your form builder's webhook settings (in tools like Typeform, this goes in the "Connect" tab under "Webhooks").

**Pro tip:** Test your webhook immediately by submitting a test form entry - Make.com will capture the data structure and make mapping easier in later steps.

## 2. Connect OpenAI to Generate Personalized Welcome Content

Add an "OpenAI" module after your webhook and select "Create a Completion" action. In the prompt field, write: "Write a personalized welcome email for {{1.name}} from {{1.company}}. Make it warm, professional, and mention their specific industry if provided: {{1.industry}}. Keep it under 150 words." Set the model to "gpt-3.5-turbo" and max tokens to 300. Map the webhook data fields (name, company, industry) using the dropdown menus that appear when you click in the prompt text box.

**Common mistake:** Don't forget to include fallback text like "your business" in case company field is empty - use Make.com's if() function for this.

## 3. Configure Automated Email Delivery via Gmail

Add a "Gmail" module and select "Send an Email" action (you'll need to authenticate your Gmail account first). In the "To" field, map the email address from your webhook data using {{1.email}}. Set the subject line as "Welcome {{1.name}} - Let's get started!" and paste the OpenAI-generated content in the message body using {{2.choices[].message.content}}. Enable "Rich Text" format and add your email signature in the signature field.

**Pro tip:** Create a Gmail label called "Auto-Welcome" and set it to apply automatically so you can track all automated emails sent through this workflow.

## 4. Set Up Slack Notifications for Your Sales Team

Add a "Slack" module and choose "Send a Message to Channel" action. Authenticate your Slack workspace and select your sales or leads channel from the dropdown. Create a formatted message like: "⬜ New lead alert!\n**Name:** {{1.name}}\n**Company:** {{1.company}}\n**Email:** {{1.email}} \n**Phone:** {{1.phone}}\n**Message:** {{1.message}}\n\nWelcome email sent automatically" Replace the webhook field numbers with your actual mapped data.

**Pro tip:** Use Slack's block formatting with buttons - add a "Contact Now" button that links to mailto:{{1.email}} for instant outreach.

## 5. Add Lead Information to Your CRM Database

Insert a "Google Sheets" or "Airtable" module (depending on your CRM choice) and select "Add a Row" action. Map each webhook field to the corresponding spreadsheet columns: Name → Column A, Email → Column B, Company → Column C, etc. Include a timestamp using Make.com's built-in function {{now}} and add a "Status" column that defaults to "New Lead." This creates an automatic database of all leads with their submission details.

**Common mistake:** Ensure your spreadsheet headers exactly match the field names you're mapping, including capitalization and spacing.

## 6. Configure Error Handling and Filters

Add error handlers to each module by right-clicking and selecting "Add error handler route." Create a "Tools" > "Set Variable" module that logs failed attempts. Set up a filter between your webhook and email modules by clicking the small wrench icon on the connecting line - add a condition that only processes leads with valid email addresses using the filter "Email contains @" to prevent sending emails to incomplete submissions.

**Pro tip:** Create a separate Slack notification for errors that pings you directly, so you know immediately if something breaks in your automation.

## 7. Test and Activate Your Complete Automation

Click "Run once" at the bottom of your scenario to test with real data from your webhook. Submit a test form entry and watch each module execute in sequence - check that the email sends, Slack message appears, and CRM updates correctly. Once everything works, click "Save" and then toggle the scenario to "ON" using the switch in the bottom left. Set the scheduling to "Immediately" so leads are processed in real-time as they submit forms.

**Pro tip:** Monitor your automation for the first 24 hours and keep the execution history open - Make.com shows exactly where any issues occur and how much time each automation saves you.