7 MOST COMMON
PROJECTS

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HighDay

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01

EMAIL LIST OPT IN BASE

Implementing an email opt-in process is crucial, as it enables effective communication with potential customers. By capturing emails through opt-in forms on your website or other channels, you can build a contact list for targeted marketing campaigns and relationship-building. The opt-in process allows you to obtain permission from individuals who are genuinely interested in your products or services, ensuring that your marketing efforts reach a receptive audience

Opt In

Opt-in refers to the process by which individuals voluntarily give their explicit consent or permission to receive certain communications or participate in specific activities.

T & C

The Terms & Conditions element has been incorporated into the platform, enabling users to include consent for phone information collection. The Terms & Conditions element will be automatically added whenever the phone element is moved into the form, but it can also be added separately if needed.

Smartlist

Create a saved smart list of all the contacts that have opted into your list, that way you can easily send to that list ensuring you only send to contacts with permission to do so.

THINGS TO CONSIDER...

What kind of opt-in list is it?

You usually only need one opt in field that you can use across all forms and surveys. However, you can create different ones for different sending lists with corresponding smart lists to easily segment & send to your lists.

Did You Setup Your Workflow Automation?

Make sure that you have a workflow that is triggered off of the opt in field updating, not being empty, or contains "yes". That way you can automate those contacts being tagged, added to your smart list, and any other steps you want the system to execute.

Is It phone, email or both?

Make sure that you get an opt in for both phone and email messages as they are separate processes, you must have explicit permission to message the client in any way.

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TEXT KEYWORD BASE

A text keyword process is a simple and effective way for businesses to engage with their audience during speaking events, in-person interactions, special offers, and various other situations. This process enables businesses to capture customer information, such as phone numbers, and initiate automated interactions or follow-ups. By using text keywords, businesses can quickly build their contact list, deliver targeted promotions or event updates, conduct surveys, gather feedback, and even facilitate interactive experiences like live polls or Q&A sessions.

Phone Number — Make sure you have an account phone number selected under your account settings - phone numbers for contacts to send to

Contains Phrase — This is a filter for the "customer replied" trigger you may need to use for this base, it ensures that the message that triggers that workflow is the contacts message has your word or phrase anywhere within it.

Exact Match Phrase — This is a filter for the "customer replied" trigger you may need to use for this base, it ensures that the message that triggers that workflow is the contacts message ONLY contains your specific word or phrase.

THINGS TO CONSIDER...

What word or phrase do you want to use?

Think about what word or phrase you want your contacts to send to your account phone number in order to fire off this workflow. Avoid overused words like info.

What happens when they message in?

Configure your workflow to fit your needs for each event, you can send an SMS back with a link to the next steps they should take, to a file download, or with more information...as well as any other actions you need the software to track.

Do you want to add them to your opt in list?

By sending in a keyword message, your contact is opting in to receive messages so you may want to consider adding them to your sending list via tag or other parameter

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APPOINTMENT BOOKING BASE

Appointment booking bases are beneficial for businesses in several ways. They simplify scheduling and resource allocation, ensuring efficient operations and better customer service. By analyzing appointment data, businesses can make informed decisions and tailor their services to meet customer needs. Automated reminders help reduce no-shows, while online booking convenience enhances customer satisfaction. Overall, these systems streamline operations, optimize resource management, and improve customer experiences, contributing to business growth.

Simple Calendar — Connect to a singular external calendar or sub-calendar with specified filtering to allow booking for an event or date range

Round Robin — This is a normal appointment where you can add the user(s) & a contact can book with one of the users based on availability or priority

Class Booking — Create a calendar for a set date or range to allow your contacts to attend a group meeting of some sort, you can even set a seat cap!

Collective Booking — Allow for multiple users to be added to this calendar and the contact booking will be based on all of the user's availability combined, on top of the calendar settings

THINGS TO CONSIDER...

How Long Is This Appointment?

Think about how long you need this appointment to be, how far in advance must they book, how far out can they book, how many appointments do you want of this type each day?

Do You Want A Branded Booking Page?

Make sure to use a funnel or website page & drag in your calendar widget to select your new appointment type. This will allow you to design a custom branded page for your contacts to land on when they go to book with you.

Did You Setup Your Workflow Automation?

Make sure that you create or use a template for your appointment confirmation and reminders, this is important to keep you contact engaged & make sure they don't miss their time slot!

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LEAD MAGNET OPT IN BASE

Lead magnets are valuable resources or incentives offered in exchange for contact information, typically in the form of email addresses. By offering high-quality content such as e-books, guides, templates, webinars, or exclusive discounts, businesses can capture the attention and interest of their target audience. Freebies not only help businesses expand their customer base but also establish trust and credibility by demonstrating their expertise. Once the contact information is obtained, businesses can nurture the leads through email marketing campaigns, delivering further valuable content, personalized offers, and building stronger relationships.

Lead Magnet A valuable resource or incentive offered by a business in exchange for contact information, typically used to attract and capture potential leads.

Opt In Opt-in refers to the process by which individuals voluntarily give their explicit consent or permission to receive certain communications or participate in specific activities.

Call To Action A call to action (CTA) is a prompt or instruction that encourages the audience to take a specific action, typically designed to generate a response or lead to further engagement.

THINGS TO CONSIDER...

What are you going to offer?

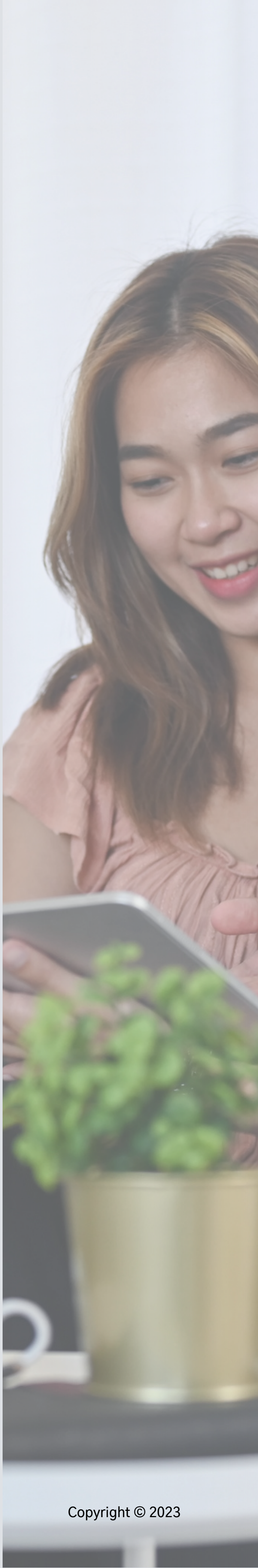
Think about what valuable resource you will give your contacts in return for opting in, do you wanna send them a file? a coupon? a free appointment?

Do You Want A Branded Page?

Make sure to use a funnel or website page & drag in your form widget to select your new lead magnet opt in form. This will allow you to design a custom branded page for your contacts to land on when they go to register.

Did You Setup Your Workflow Automation?

Make sure that you use the form submitted trigger with a filter for your specific lead magnet's form. Then you can send an email with your file or more information attached & keep nurturing them as time goes on!



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PRODUCT PURCHASE BASE

A product purchase system is a crucial component for any business as it facilitates the collection of payments, enabling the generation of revenue. It serves as a means to gather essential contact information from customers, allowing for effective communication and building customer relationships. A purchase base provides businesses with valuable data on sales, customer preferences, and patterns, aiding in decision-making and strategic planning for future growth. Overall, a well-implemented product purchase base is indispensable for businesses to monetize their offerings, establish customer connections, and drive financial sustainability.

Product — After integrating your payment processor, you can create different products in your account such as one time payments, subscriptions, or payment plans.

Prices — After creating a product, you can add additional pricing option within it for different offers, audiences, or payment options.

Order Form — A site element that can be added to a funnel or website page that collects contact information and payment details on your page. You can automate off of "order submitted" to capture payments for specific products across the platform.

THINGS TO CONSIDER...

How many products or prices do you need?

Based on your offer you may need more than one product or prices to cover all the different offers, audiences, or payment options you want to offer. They can all be added to the same checkout page or create unique pages for each product or price option.

Do you want a branded checkout page?

Make sure to use a funnel or website page & drag in your order form widget to customize. This will allow you to design a custom branded page for your contacts to land on when they go to purchase. Add your products under the page's "products" tab.

Did You Setup Your Workflow Automation?

Make sure that you create or use a template for your purchase confirmation and follow up, this is important to keep you contact engaged & nurture them to leave a review or take the next step in your pipeline!

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EVENT OR DEADLINE BASE

Utilizing an event project base is crucial for branded events, webinars, and meeting deadlines efficiently. It allows businesses to create a template or framework for event planning, enabling them to streamline the process and ensure consistent branding across multiple events. By being able to clone and edit the project base for each event, businesses can quickly set up and customize the necessary tasks, timelines, and resources, saving time and effort in event organization. This approach facilitates smoother execution, better coordination, and increased productivity, ultimately leading to successful and impactful events.

Set Event Date

Use this action in your workflow automation to set a date & time according to your custom parameters & use wait steps based on that set date & time to send reminders, follow ups, and more.

Class Booking

Create a calendar for a set date or range to allow your contacts to attend a group meeting of some sort, you can even set a seat cap!

THINGS TO CONSIDER...

How long is your event?

Think about how long you need your event to be? For events and deadlines, how far in advance do you want to notify your list?

Do I use the class calendar or an custom registration setup?

There are two methods you can use to set up an event. The first method is to create a form or order form on a custom registration page and set up a workflow that starts when the (order) form is submitted. This includes creating the registration form, checkout & thank you pages, and a workflow triggered by (order) form submission. You can also use the event start date action to schedule your event and set up reminders using wait steps.

The second method involves using a class booking calendar where you specify the date and time or a range of dates. You can set a specific number of available seats and invite people from your list to register through this calendar. This method requires setting up the class calendar and a registration workflow triggered when people book their slots. You can use wait steps based on the appointment time to send reminders and follow-up actions.

Overall, these methods offer different approaches to event setup, and you can choose the one that suits your needs best.

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MEMBERSHIP REGISTRATION BASE

Using a membership site offers significant benefits for businesses in attracting new clients and engaging with existing ones through valuable course content, updates, and a phone app. By creating a membership site, businesses can provide exclusive access to premium content, such as online courses, resources, and tools, which acts as a powerful incentive to attract and retain clients. It allows businesses to deliver ongoing value and updates to their clients, keeping them engaged and invested in the brand. Ultimately, a membership site serves as a central hub for client engagement, fostering loyalty, and establishing the business as a trusted authority in its industry.

Membership Site — In your account, you can customize your membership settings to your brand such as logo, site name, and branding.

Product — One membership course, this is where your content is housed in modules, lessons, files, comments, videos, and more.

Offer — The payment set-up of one or more courses. An offer can have one product in it or you can bundle multiple products together for a certain offered price. You can have multiple offers with a variety of products within them.

PWA — Under your account's membership's site settings, you can customize your portal UI when on mobile through the Personal Web App

THINGS TO CONSIDER...

How many products do you want to add to your offer?

Even if you are only including one product course in your offer, you always want to create at least a free offer in order to add contacts to it. Offers are what your contacts are granted access to, products are the content included in each offer. You can bundle for one offer & create separate offers for each product too!

Do I use the offer registration page or a custom registration setup?

[Custom] Configure Portal – Create Product – Create Free Offer (don't forget to bundle if needed) – Publish Offer – Create Registration Funnel with Sign Up & Thank You page – pull in an order form element or form element depending on if you are charging or not – use a workflow with a "Order Form Submitted" or "Form Submitted" trigger & at least a "Grant Offer Access" action step.
[Simple] Configure Portal – Create Product – Create Offer (don't forget to bundle if needed) – Configure Offer Price – Edit Checkout & Configure Your Look – Publish – Send customers to URL under the "Get link" button

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CHECKOUT OUR SUPPORT OPTIONS & RESOURCES

Our team is fully dedicated to supporting you every step of the way, ensuring your success. You can review the wide range of resources and support options available to guide you through any challenges or inquiries. Don't hesitate to reach out to our team whenever you need additional assistance; we're always here to help!

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