



# SOCIAL SPARROW

## YOUR DIGITAL MARKETING ALLY

### NEST UPDATES 4/3/2024

**REMINDER/NO CHANGE:** Appointments + reschedule MUST be booked via the calendar as unconfirmed - no manual tag, no dragging to appt booked (no change here, just reiterating)

**CHANGE:** Don't drop cards in the pop up boxes for won, lost, or abandoned for a status updates - add manual tag to change the opp card status (won/lost/abandoned) - this change is so we can keep NAGF sharing the abandoned status with abandoned leads, also and remove the previous conflicts we had (see new tag list below)

**CHANGE:** Consult Complete is now SHOWED/CONSULT COMPLETE - this will hold those leads who have showed to their appointment but who are undecided. Along with this we added a WON stage to hold those who do convert to care/are marked won.

**CHANGE:** Wording on the new lead email/text to the LM has been reworded to accommodate the manual tag for initial lead and says 'Lead Added to Initial Lead Follow Up' instead of new lead submission (\*see note below)

**CHANGE:** Wording on the lead replied + moved to hot email sent to the LM has been reworded to accommodate the manual tag for hot and says 'Lead Replied + Added to HOT Stage' instead of lead replied (\*see note below)

**NEW:** Leads who do not reply to NCNS why text will now be added to reschedule follow up - previously they were tagged for admin follow up, now they still get the tag but will also be added to reschedule follow up (tag updated to ns: no reply)

**NEW:** Manual tags for movement into initial lead, warm, extended, hot, nagf, won, lost, abandoned - move pipeline stages + add lead to messaging (if applicable) - this is to help prevent the workflow overlap that can happen and pull leads from a WF prematurely + make it easier for the LMs to manually add a lead to follow up (do not drag)

**NEW:** Manual tags for appointment status change for no show, cancel, showed - appt status change + move to stage + add to follow up - can update status of appt via the tags or can still update with did they show email

**NEW:** Manual tags for COMBOS! - (cancelled/rescheduled - you want to cancel + reschedule)

**NEW:** Fixed 'Phasing out' / Stale lead workflows (fully updated) - lead will move at the end of the designated wait time frame (end of a workflow), regardless if they have a phone number, email, or if any are invalid, missing, or on DND **\*Please note this is NOT retroactive. This starts with leads from this point forward**

**NEW:** Updated 'listen' for replies - will catch replies to LM messages in addition to WF messages - this listen will move lead to hot (from initial lead, warm, extended, tasked and reschedule) - this one is a new type of listen and we will be watching and make sure it's working as intended but don't foresee any issues (will NOT pull from appt booked, consult complete, nagf, won, lost, abandoned)

**NEW:** Due to the new 'listen' for replies (above) - please book the appt as quickly as you want - in fact, faster is better (no more being asked to slow down, or going to fast)

**NEW:** Text/Email that sends out when a lead cancels an appt or text/email that sends out to FOS/LM when a lead canceled their appt has been removed.

**NEW:** Pipeline stages in new order + rescheduled pipeline has been split into No Show/RS + Canceled/RS

**NOTE:** Messaging length in initial lead, warm, extended, reschedule are all slightly adjusted to fit within the desired timeframe (will not be the exact days due to variance in the day & time the lead opted in; lead should receive final message within 5 days before moving to next stage)

**FINAL NOTE:** Full list of tags is coming soon. For now here are the new ones for movement/appt status/opp card status listed above:

**Appointment Manual Tags:**

manual - cancelled/reschedule  
manual - cancelled/abandoned  
manual - cancelled/nagf  
manual - no show/reschedule  
manual - no show/abandoned  
manual - no show/nagf  
manual - showed/consult complete  
manual - hard confirmed  
manual - cancelled/tasked

**Pipeline Status Manual Tags:**

manual - initial lead  
manual - hot  
manual - warm  
manual - extended  
manual - tasked  
manual - won  
manual - lost  
manual - abandoned  
manual - nagf