WINBACK CAMPAIGN
IMPLEMENTATION GUIDE

SECTION ONE: **PREPARATION**

Identify Your Offer

In this step, we want to identify what your irresistable offer will be. Keep in mind that you want to make it as strong as possible to move these people to action and you will also want to make it a time limited offer.

Set the expiration date

Identify Your Targeting

You can send this to people who came in for a consult and didn't book or just leads that haven't come in at all.

Ensure you have open slots in your online scheduler

Complete the online scheduler video training

SECTION TWO: **EMAIL CAMPAIGN**

Download the email templates here

Edit the template copy according to your needs.

Pull the list of leads from your CRM

Decide how far back you want to go and whether you want to include people who have come in for a consultation or just leads that haven't come in at all.

Take out leads without email addresses

Send an email request to the CMS support team

Please include "Winback Campaign Request" in the subject line and make sure to send us everything minimum 10 days prior to desired launch date.

Your company logo   The finalized email copy

Your mailing list   Date of delivery

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SECTION THREE: **TEXT MESSAGE CAMPAIGN**

Download the text message templates here

Edit the template copy according to your needs.

Sign up for Text Magic or Combo 360

Pull the list of leads from your CRM

Decide how far back you want to go and whether you want to include people who have come in for a consultation or just leads that haven't come in at all.

Take out leads without phone numbers

Send an email request to the CMS support team

Please include "Winback Campaign Request" in the subject line and make sure to send us everything minimum 10 days prior to desired launch date.

Credentials to texting tool   The finalized text copy

Your texting list   Date of delivery

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SECTION FOUR: **FINAL NOTES**

Do your best to confirm all appointments ASAP

If someone schedules, denote this in your CRM

Ensure you have proper staffing for two-way texting

Congratulations! You're done!