AUTOMATION CHEAT SHEET

WHAT ARE AUTOMATIONS?

Your CRM has Automations pre-built inside of it. These automations will do specific things like start drip campaigns, add tags, and assign contacts. These automations are initiated by "triggers," which are often tags that are added to a contact/lead. Below is a list of automations your CRM has pre-built into it, and what they do.

1. "THE DRIP"

- Trigger: "Drip" tag
- This is intended for NEW/FRESH leads. Triggered by adding "drip" to a contact, it will start a text/email drip campaign that will send out messages for the next 2-3 weeks until a client responds. It will know what type of lead it is as long as you tag the leads appropriately when importing them.

2. "Post Sale Flow"

- Trigger: "Sold" tag
- This is intended for leads that you have sold a policy to. Triggered by adding "sold" to a client after you sold and cement the sale, it will start a text/email drip campaign that will 1. Immedietly send them all their policy details, 2. Follow up with them in 14 days to make sure they received their policy packet, 3. Send a message once a quarter to check in on the client.

3. "No Show"

- Trigger: "No Show" tag
- This is intended for a lead who has no shown you on an appointment. Triggered by adding "No Show" to a contact, it will start a text/email drip campaign that will send out messages for the next 2-3 weeks until a client responds and you can get them back on the scheduled

4. "Lapse Pending/Canceled"

- Trigger: "Lapse" tag
- This is intended for a lead who has missed a premium payment or canceled their coverage, so you can get this resolved. Triggered by adding "Lapse" to a contact, it will start a text/email drip campaign that will send out messages for the next 2-3 weeks or until a client responds. STILL CALL CLIENT FIRST and every couple of days