

Automated  
User Action Required

# New Lead

Regular Opt-in (No appointment booked yet)

Confirmation Email + SMS to lead  
*\*The Conf. Email will give the lead the option to book to your Discovery Call Calendar\**

Internal notification to assigned user

Added to Opportunities tab  
Pipeline: 1. Calling Pipeline  
Stage: (NEW LEADS) 1st Call

Call Lead ASAP

Answer

No Answer

Get necessary screening info book Virtual, In-person, or Discovery Call appointment

Move to Stage: 1st COMPLETE [ @ ]

Lead will automatically move to stage: Manual Action Calling after 5 Hours

Visit Conversations Tab to check for any inbound messages then click Manual Actions tab, You can also view manual actions from the dashboard.

Visit Manual Actions 1 or 2 times/day and make your calls by clicking "lets start" lead will automatically get drip SMS's after each call

-Call Outcome-  
The System will prompt you after each call

NO ANSWER  
Next Manual Actions Calling Stage

COMPLETED  
Will Remove Lead from Manual Action Calling

12 calls still no answer

Lead will move to Old Leads Pipeline in the OLD LEADS DRIP Stage

OLD LEADS SMS DRIP for about 2 months

Pre-Set / Discovery Call Appointment

Confirmation Email + SMS to lead

Internal notification to assigned user

Added to Opportunities tab  
Pipeline: 2. Appointments  
Stage: Discovery Call Appt /  
Removed from New Leads Calling sequence

Reminder Email + SMS to lead  
24hr Reminder Email  
1hr Reminder Email  
30 min Reminder SMS

30 Min Reminder - Internal SMS notification to assigned user

Call lead at appt time

Answer

No Answer

Get necessary screening info book Virtual or In-person Follow up appointment

**\*NOTE\***  
Each appointment type has its own confirmation/reminders along with a no-show stage

Move to Stage: Discovery Call No-Show

Lead will automatically get sms drip trying to get the lead to reschedule or just respond to the drip

Virtual / In-Person Appointment

Confirmation Email + SMS to lead

Internal notification to assigned user

Added to Opportunities tab  
Pipeline: 2. Appointments  
Stage: Virtual Proposal Set / In-Person Appt  
Removed from New Leads Calling sequence

Reminder Email + SMS to lead  
24hr Reminder Email  
1hr Reminder Email  
30 min Reminder SMS

30 Min Reminder - Internal SMS notification to assigned user

Join Meeting link or show up at appt time

Attended

No Show

Move to Manual Follow Up Stage

**\*NOTE\***  
Speak with the Optimize Team about your proposal tool and how we can incorporate it in the lead flow

Send Proposal

Move to Proposal Sent / Pending Stage

**\*NOTE\***  
Speak with the Optimize Team about creating a follow-up sms/email sequence

Closed

Still Pending

Move to Closed! Stage

No action required

Not Interested Leads

Within any pipeline take and drag the lead to the bottom left into the red LOST Stage

Add reason why not interested

Lead will be DND'd  
The system will not let us email, SMS, or call the lead anymore

Note\* Can be undone if needed