CARDONE VENTURES

CRM
BEST PRACTICES

CRM Best Practices

SCALE CLIENT

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SECTION 1 | Getting Started

Setting User Permissions

- Navigate to settings > my staff to access Team Management
- To update User Permissions, drop down User Permissions and toggle on/off which setting you would like to update access for.
- To update user roles, drop down User Roles and change the user to an admin or a user.
    - Admins can add new users and remove users. Admins can also change settings for other users and view the audit logs.

Setting Up 2-Factor Authentication (2FA)

- Visit website: https://app.10xscalecrm.com/ to log in
- Type in your user email address and password
- Verify your preferred security code push of choice
    - Email
    - Mobile Device
- Click 'Send Security Code'
- Input security code received on phone or email into the code box
- Select 'Confirm Code'

Calendar Integration Setup

- Connecting to the Outlook Integration
    - Navigate to Settings > Profile
    - Scroll down to "Integrations" and click on the "Connect" button next to Outlook Calendar
- Step 2: Configure the Calendar to use Outlook Integration
    - Navigate to Settings > Profile
    - Under "Calendar Configuration" go to "Primary Calendar"
    - Click edit
    - Select your Outlook account and find your calendars. Select the one you want to read/write.
        - NOTE: your Primary Calendar will read all the calendar events from Google/Outlook and write all the appointments to Outlook/Google
    - Navigate to "Check for Conflicts" and click on the edit button
    - Here you can select the calendar that you want to check for conflicts from
        - NOTE: this will only read calendar events from Google/Outlook

SECTION 2 | Sales Process

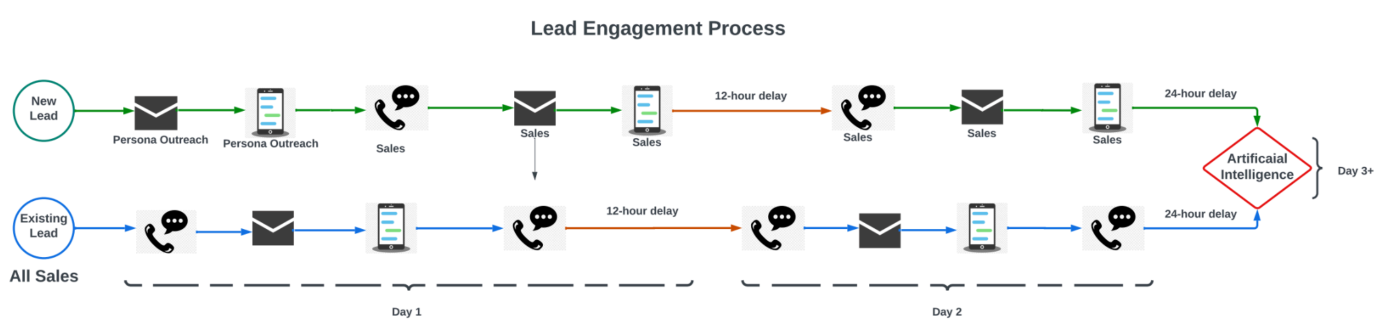
Lead Assignment

- Round Robin Lead Assignment
    - A round robin lead assignment is used to evenly distribute leads across a chosen group of users or all users. This workflow is typically used to assign new leads to your sales team when they enter your CRM.

Building Contact Views

- Views should be used to categorize your leads and prioritize your outreach.
- View Recommendations
    - Lead Score
    - Vertical/Product specific
    - Owned Leads
    - Campaign Targeted

Lead Engagement Process



Lead Lifecycle

- **Subscriber:** a contact that has opted in to hear more from you by signing up for your blog or newsletter.
- **Lead:** a contact or company that has converted on your website or through some other interaction with your organization beyond a subscription sign up.
- **Marketing Qualified Lead:** a contact or company that your marketing team has qualified as ready for the sales team.
- **Sales Qualified Lead:** a contact or company that your sales team has qualified as a potential customer.
- **Opportunity:** a contact or company that is associated with a deal (e.g., they're involved in a potential deal with your organization).
- **Customer:** a contact or company with at least one closed deal.
- **Evangelist:** a customer that has advocated for your organization.
- **Other:** a contact or company that does not fit any of the above stages.

Qualifying Leads for Your Sales Pipeline - Opening a Deal

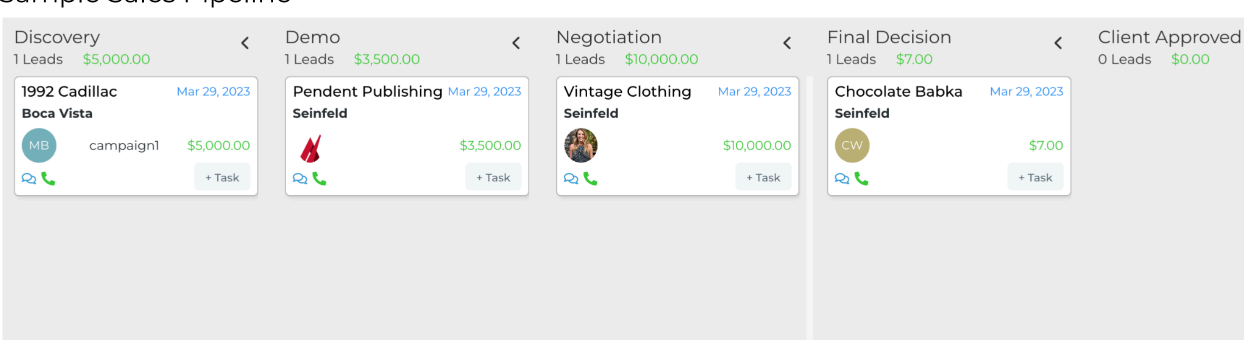
Budget, Authority, Need, Timing (BANT)
In order to ensure that your sales team puts the appropriate leads into your sales pipeline, you must define qualification parameters. If you are negligent in doing so, you run the risk of putting non-buyers into your pipeline who are unlikely to close a deal with your company. This will negatively impact your statistics for Close Rate, Time to Close, and overall Efficacy. It will also artificially inflate your Pipeline Velocity, Expected Revenue, and Closed Lost deals.

- **Budget:** Does the lead have the capital to invest in your product or could they find the capital to invest in your product?
- **Authority:** Are they the decision maker? Do other parties need to be involved?
- **Need:** Does the product you are selling solve a problem for the lead?
- **Timing:** Does the purchase of this product fit within the timeline of solving their problem? Ie. “We budgeted to purchase CRM software in Q2 so we cannot commit until March”.

Sales Pipeline

- **Setting up your Sales Pipeline**
    - Define the stages of your pipeline
    - Identify how many opportunities typically go through each stage of your pipeline
    - Calculate the number of opportunities you need in each stage to hit your targets
    - Identify the commonalities of leads that go through each stage of your pipeline
        - Use this data to enhance your sales process
    - Establish a routine to clean your pipeline
        - When should deals be Closed Lost?
        - How often should your deals be audited?
        - How often should open deals be communicated with?
        - Who takes over current deals when a sales representative leaves your company?

Sample Sales Pipeline



- **Automating your Sales Pipeline**
    - There are many reasons you may want to automate your sales pipeline. You can use automations for assigning tasks to sales reps so that they do not forget to follow up. You can change properties in the contact or company record as opportunities graduate through your pipeline. You can notify users and teams when a deal is closed won or closed lost.
- **Opening a deal**
    - Opening a deal should be a unique event. Not everyone you speak with is an opportunity nor should they be added to your pipeline. This is the purpose of the Discovery Call. The Discovery Call is to qualify a prospect, oftentimes using BANT (Budget, Authority, Need, Timing). You may have some unique qualifiers in your specific business and those should be taken into consideration.
- **Closing a deal**
    - It's important to identify when a deal should be closed so that you maintain consistency in your pipeline and ensure you are actively managing the flow of your pipeline. Approach your pipeline with the "No Lead Left Behind" mentality to ensure you are maximizing your close rate with prospects who have made it into your pipeline. Remember, you have already qualified these prospects so they are your highest likelihood to turn into customers.
    - **Closed Lost**: Closed Lost is always one of the more difficult parameters to define. There are two main rules to consider when assessing if a deal should move to Closed Lost in your sales pipeline:
        - How long has the prospect been unresponsive to you?
        - When was the last time they advanced stages in your sales pipeline?
            - Tip: If you know your average time to close a deal, you can use this as your baseline metric to establish when a deal should move to closed lost.
    - **Closed Won**: Closed Won deals are much more self explanatory. The most important thing to note is that you must actually have a transaction process prior to moving a deal to Closed Won. Why? If you move a deal to Closed Won prior to the transaction processing:
        - A transaction may be declined for various reasons
        - You risk reporting inaccurate numbers
        - You may compensate your team on money not collected
        - Various KPIs will be inflated

<u>Call Scripts</u>

- **Purpose:** Scripts should be made for all call types highlighted below. A script gives the caller a foundation to follow.
    - **Discovery Call**
        - This call is to qualify your prospect (See Sales Qualified Lead). Once you have had this call, you can move a prospect to an open deal in your pipeline.

    - **Demo Call**
        - A demo call is the chance to identify the customer's Dominant Buying Motive (DMB) and showcase how your product can solve their problem.
    - **Closing Call**
        - The closing call is an opportunity to address any lingering questions and to solidify the agreement for product purchase.

Follow Up

- **Communication Vehicles**
    - Email
    - SMS
    - Video SMS
    - LinkedIn
    - Instagram
    - Artificial Intelligence
- **Cadence**
    - Cadence is very important when it comes to sales. You want to keep momentum with your prospective customer but you also need to be cautious as to not offend them with overcommunication which can often be perceived as 'pushy' or 'aggressive'.
- **Automating Follow Up**
    - There are quite a few ways to automate your follow up. You can do this by using workflows or specific integrations into the CRM.
        - Automated follow up should *never* replace personal outreach. It should be complementary to the personal touch provided by your sales team.

Lead Scoring

Purpose: Lead Scoring is used to assign a point value to the leads in your system in order to see how engaged they are with your messaging.

Goal: The goal of lead scoring is to let your sales representatives know when a prospect is ready for your message. It helps them to prioritize their daily outreach. The higher the lead score, the higher up the priority list.

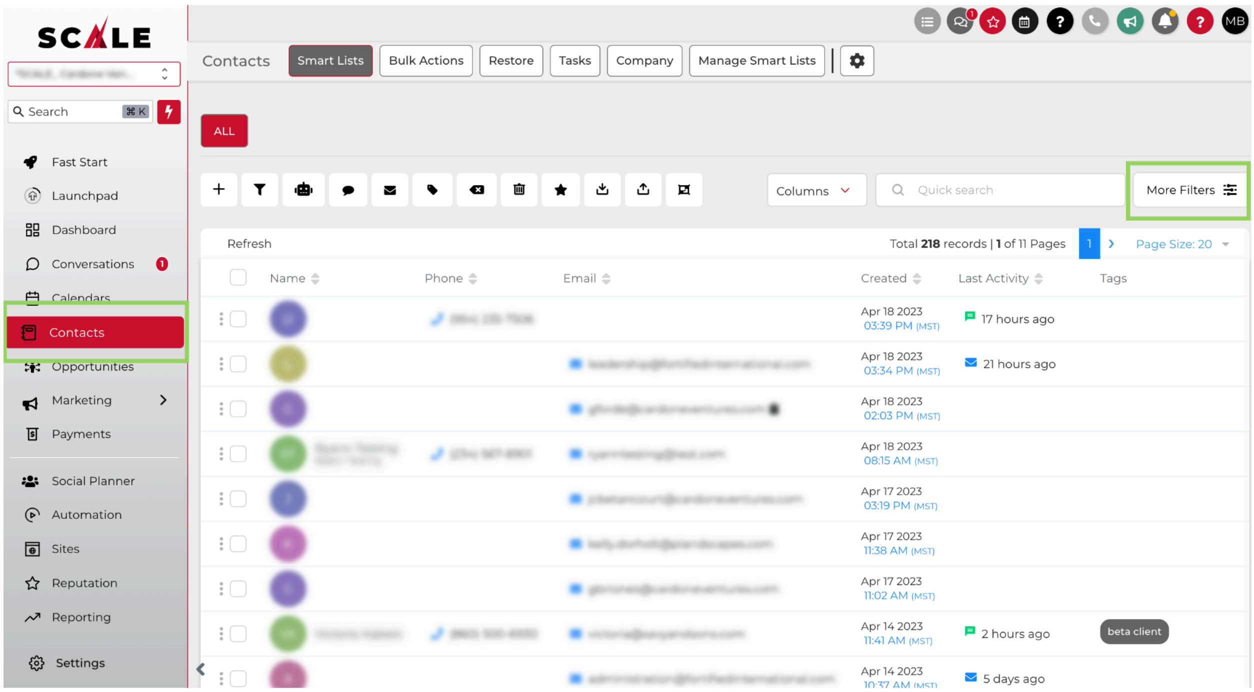
Setting Up Lead Scoring

- Define the criteria for positive attributes
    - Page View
    - Email Click (and how many times)
    - Email Open (and how many times) *this may be affected by Apple's new privacy features
    - LinkedIn Connection Request Accepted
    - Member of X List
    - Attached Video Opened
    - Form Submission

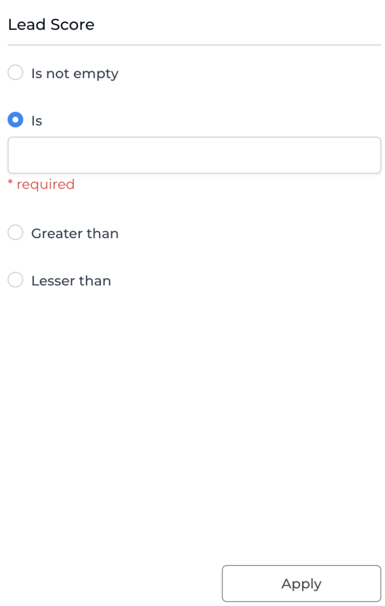
- Define the criteria for negative attributes
    - Unsubscribe
    - Email Opt-Out
    - Last Engagement Date
    - Lead Status (Blacklist, Unengaged, Non-Responsive)

Using Lead Scoring

Select Contacts > More Filters



Search for 'Lead Score' and add filters. Don't forget to press Apply!



Reporting

Team Reporting

- **Total Contract Value (TCV)**
  - Total Contract Value is the dollar amount of all deals that have been Closed Won.
    - *You should be reporting TCV on a daily basis during your all-team meeting.*
- **Call Volume**
  - Call Volume is a measurement of the outbound calls made over a certain period of time.
    - *You should be reporting Call Volume on a daily basis during your all-team meeting*
- **Meetings Booked**
  - Meetings booked measures the number of meetings booked
    - *This should be reported on per campaign or booking avenue to determine how each is performing*
- **Meeting Outcome**
  - Meeting outcome tracks the number of meetings that showed, canceled, and no-showed
    - *This should be reported on per campaign or booking avenue to determine how each is performing*
- **Deal Closed Won Close Rate**
  - Close rate is the number of Closed Won Deals / Total Opened Deals.
- **Pipeline Velocity**
  - Pipeline Velocity is a measurement of how long it takes a deal to move through your sales pipeline. It is calculated by taking the total number of closed deals in a given time and dividing it by the number of days it took to close the deals.

Individual Reporting

- **Total Contract Value (TCV) per Sales Representative**
  - Total Contract Value per Sales Representative is a calculation of the total dollar amount of deals Closed Won from a specific sales representative.
- **Call Volume per Sales Representative**
  - Call Volume per Sales Representative is the total amount of calls made by a Sales Representative in a given time period.
- **Meetings Booked per Sales Representative**
  - Meetings booked per Sales team Setter is the total number of qualified meetings booked with a Sales Closer in a given time period.
- **Meeting Outcome per Sales Representative**
  - Meeting outcome per Sales team Setter is the total number of meetings per meeting outcome (ie. Showed, Canceled, No-Showed)
- **Close Rate per Sales Representative**
  - Close Rate per Sales Representative is the percentage of deals Closed Won divided by the total number of deals opened.

- This is important to measure representative performance against a baseline. You should also be measuring who is doing well and identify what behaviors they are doing differently to achieve a higher close rate.

- **Average Talk Time**
  - Average Talk Time tells you how much time your representative spends on each call.
    - *A low talk time indicates a poor connection rate. This may be due to the representative calling less qualified/unqualified prospects. A representative could be calling and hanging up just to hit their individual call volume target. Or, a representative could be struggling being engaging while on calls.*

Data Hygiene (do not be on this board, board)

- **Call Outcome = Unknown**
  - Track this metric in order to ensure your reps are tracking the outcome of a call. Are reps connecting with clients? Leaving a lot of voicemails? Bad contact information?
- **Meeting Outcome = Unknown**
  - Track this metric to identify if prospects are showing up to scheduled calls. This is an opportunity for many businesses.
- **Meeting Outcome = Scheduled (post meeting date)**
  - Track this metric to identify meetings in the past that were not updated with the meeting outcome.
- **Deal Close Date = Past Due**
  - Track this metric to ensure your sales representatives are keeping an eye on open deals. If the anticipated close date is past due, they probably are not paying close attention to the deal.
- **Deal Amount = Unknown**
  - Track this metric to know what revenue you can expect to transact with your business. If this field is blank, your estimated income will be inaccurate.
- **Deal Owner = Unknown**
  - Track this to know who has closed deals. This is also often used to calculate commissions. If the sales representative's name is not on the deal, they should not be receiving commission.

SECTION 3 | Landing Pages

Webinar

- Email 1 - Confirm Registration
- Email 2 - Value add related to webinar (engagement)
- Email 3 - Testimonial from past attendee
- Email 4 - 48 hour reminder
- Email 5 - 24 hour reminder
- Email 6 - 12 hour reminder
- Email 7 - Day of reminder
- Email 8 - 1 hour reminder
- Email 9 - Happening now reminder
- Email 10 - (optional) - 15 minutes after - It's not too late (we are currently live)

Application

- Email 1 - Confirm form submission
- Email 2 - Value add related to application (engagement)
- Email 3 - Testimonial from past attendee
- Email 4 - 1 hour reminder prior to meeting
- Email 5 (optional) - Your call is start in 5 minutes

Sales

- Email 1 - Order confirmation (Can it tell them what they bought?)
- Email 2 - Second sale (Upsell/cross-sell)
- Email 3 - Special promotion
- Email 4 - Hard call to action (FOMO email - get it just for today)
    - Move them to general nurture after this.

Lead Generation

- Email 1 - Confirm/Delivery
- Email 2 - Value add related to offering (Engagement)
- Email 3 - Testimonial from past attendee
- Email 4 - Call to Action (Hey, you haven't booked your call yet, here's why, here's the value)
    - Repeat steps 2-4 when necessary
- Final Email: Hard call to action (FOMO email - get it just for today)
    - Move them to general nurture after this

Scheduled Call

- Email 1 - Confirm form submission
  Sales team should reach out immediately

SECTION 4 | Workflows

Fast Five + Nurture Email Campaign Workflow

[YouTube Educational Resource]

Purpose
The Fast Five workflow is intended to reach out to your lead within the first 5 minutes of them submitting a form on any of your conversion pages. Your likelihood of closing a lead is 1000x higher when you contact a lead within the first 5 minutes. This workflow is crucial to increasing your sales pipeline conversion rate.

Goal
The goal of this workflow is to book a meeting with the lead as quickly as possible to ensure you are capturing them at the peak of their interest in your product or service.

Setup:
- Trigger: Form Submission
- Workflow Goal: Meeting Booking

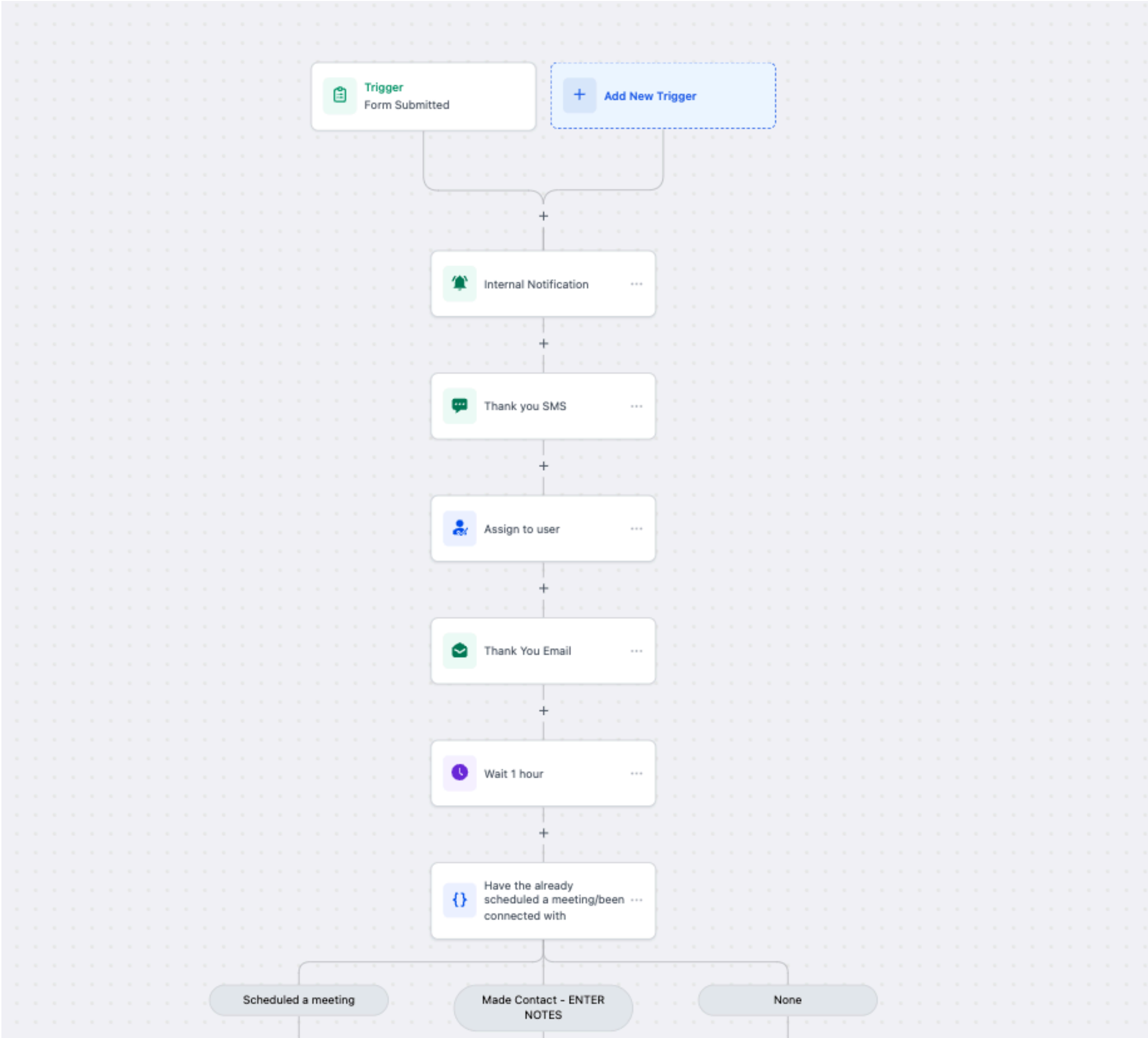
Integrations Needed:
- Calendar Integration (Meeting Links)
- Virtual Meeting Platform (ie. Zoom)
- SMS Integration
- Email Integration

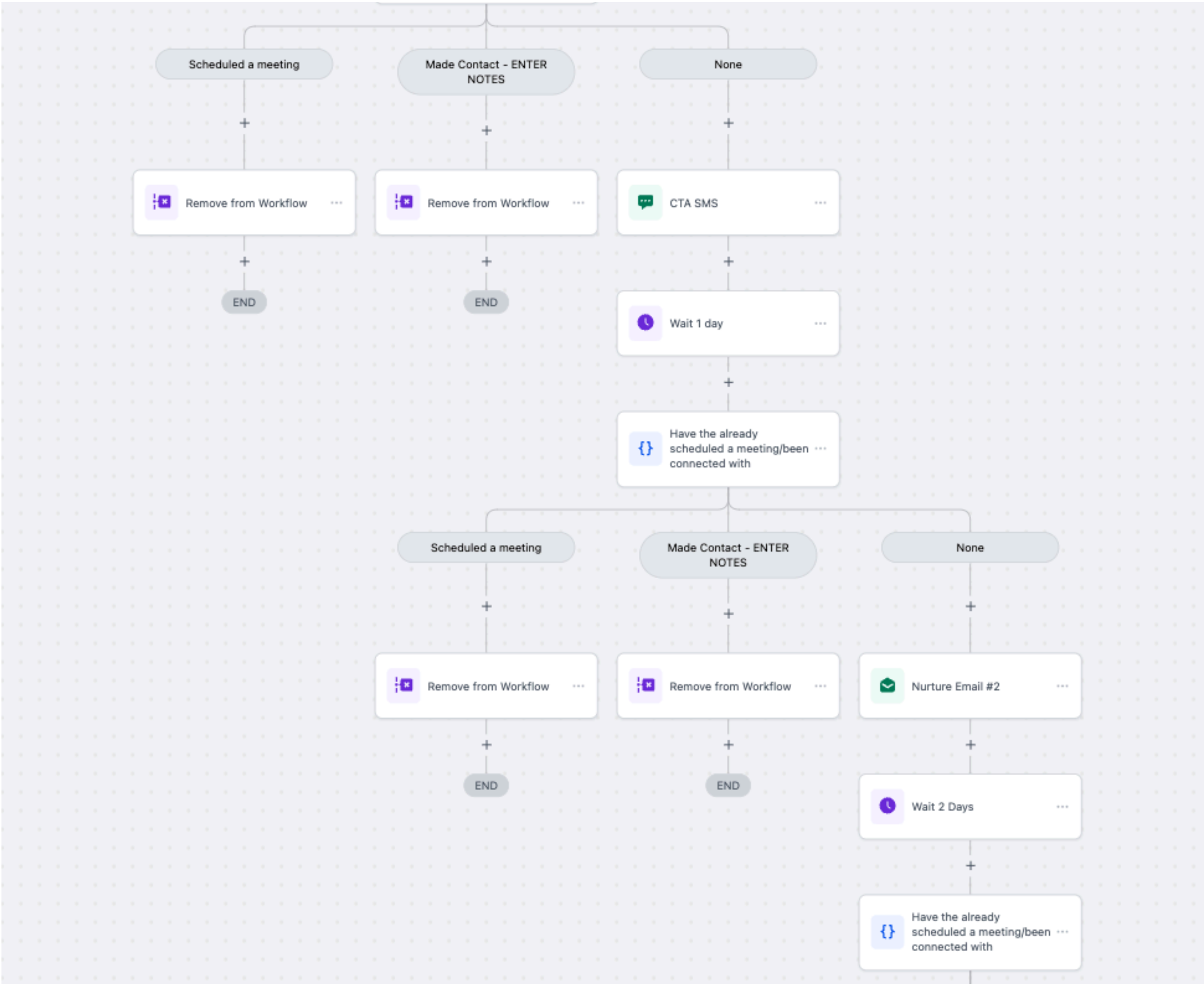
Workflow Dependency (what other workflows are needed to optimize this workflow)
- Lead Assignment Workflow
- Lead Status Workflow

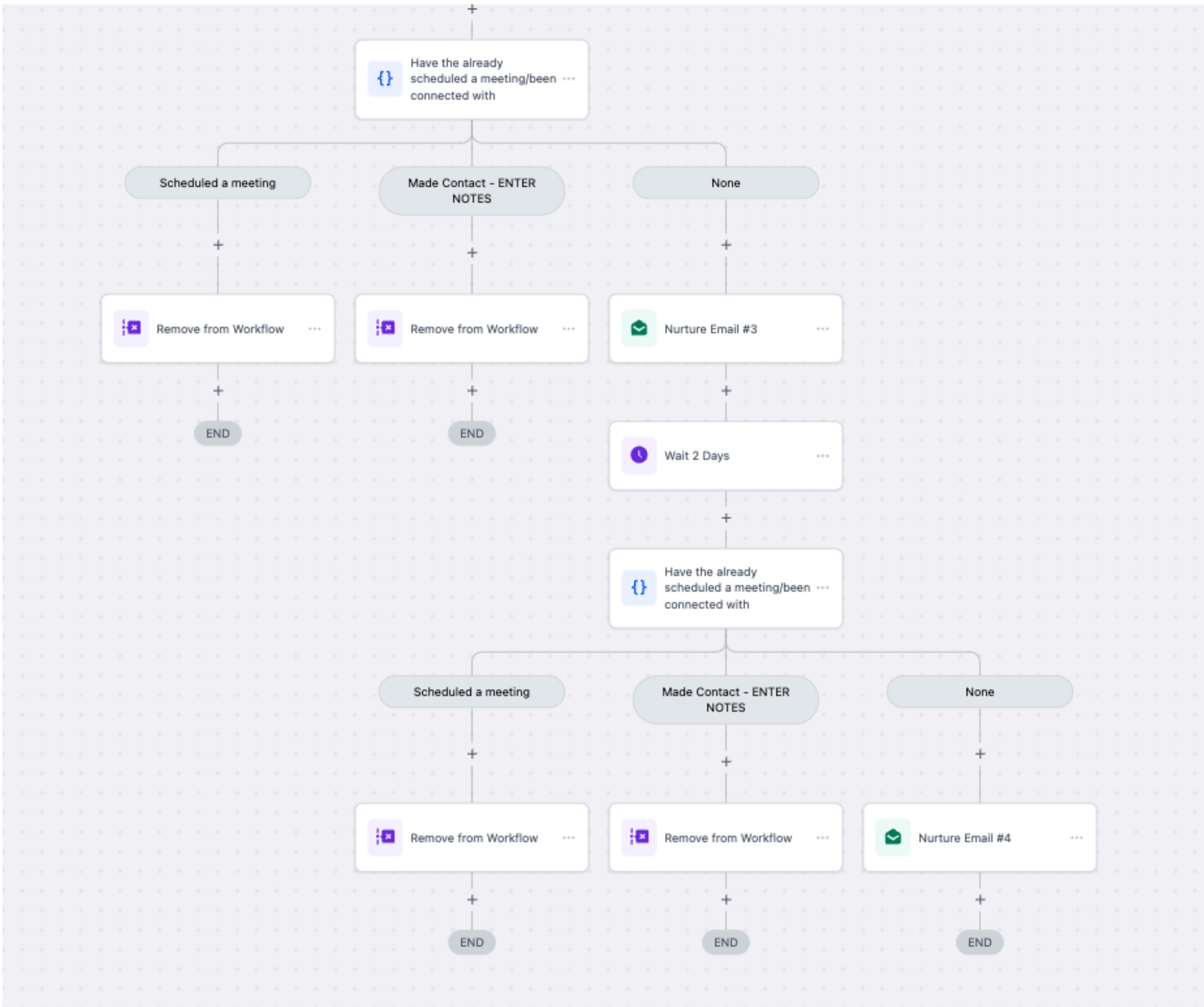
Steps
- Send internal notification of new lead to the team
- Send text message to lead
    - "Thanks for contacting us, *Contact First Name*! My name is *Avatar Name* with *Business Name*. Let me know the best time to reach you and we can get you the information you need ! Reply 'STOP' and I won't text again."
- Assign to user
- Send email to lead
    - "Hi *Contact Name*, This is *Avatar Name* with *Business Name*. Thanks so much for contacting us. I'd love to grab a few minutes with you on the phone to answer any questions you may have. Let me know what time works best for

you or if it's easier, please choose a time that's best for (hyperlink to meeting booking page) you directly on my calendar."

- Wait 1 hour
- Check for meeting booking (goal). If no meeting has been booked, continue to next step
- Send text message #2 with CTA
  - "Feel free to book a 15 minute call with the team here: *Insert short code hyperlink to meeting booking page*"
- Wait 1 day
- Check for meeting booking (goal). If no meeting has been booked, continue to next step
- Send nurture email #2
- Wait 2 days
- Check for meeting booking (goal). If no meeting has been booked, continue to next step
- Send nurture email #3
- Wait 2 days
- Check for meeting booking (goal). If no meeting has been booked, continue to next step
- Send nurture email #4


Trigger
Form Submitted
Add New Trigger
Internal Notification
Thank you SMS
Assign to user
Thank You Email
Wait 1 hour
Have the already scheduled a meeting/been connected with
Scheduled a meeting
Made Contact - ENTER NOTES
None


Scheduled a meeting
Made Contact - ENTER NOTES
None
Remove from Workflow
Remove from Workflow
CTA SMS
END
END
Wait 1 day
Have the already scheduled a meeting/been connected with
Scheduled a meeting
Made Contact - ENTER NOTES
None
Remove from Workflow
Remove from Workflow
Nurture Email #2
END
END
Wait 2 Days
Have the already scheduled a meeting/been connected with



Appointment Confirmation & Reminder Workflow

[YouTube Educational Resource]

Purpose
This workflow is intended to confirm a leads appointment with your sales team and to provide reminders prior to their meeting.

Goal
To increase meeting show rate with the end goal of increasing deal closed won rate.

Setup

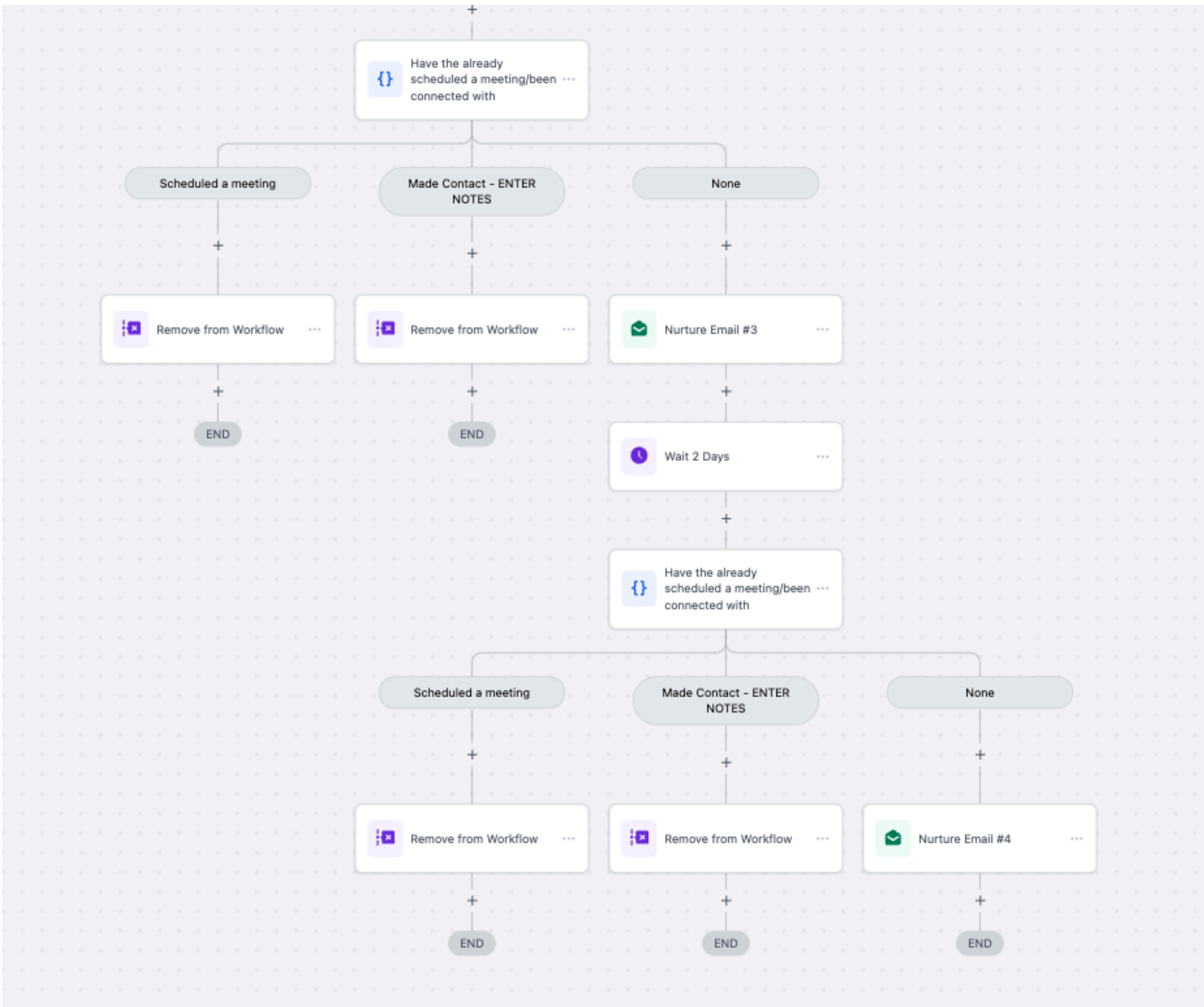
- Trigger: Appointment Booking
- Workflow Goal: N/A

Integrations Needed

- Calendar Integration
- Virtual Meeting Platform (ie. Zoom)
- SMS Integration
- Email Integration

Workflow Dependency (what other workflows are needed to optimize this workflow)
- N/A

Steps
- Send email with appointment details
    - “Thanks for booking a meeting with our team! We look forward to speaking with you soon.”
        - *Always include links to cancel/reschedule.
- -DELAY- 24 hours prior to meeting
- Send email with 24-hour meeting reminder
    - “Your meeting with *Business Name or Sales Rep Name* is in 24 hours. If you need to cancel or reschedule, please let us know by clicking the appropriate link below. Talk soon!”
- Send text message
    - “Your meeting with *Company Name* is in 24 hours. See you soon!”
- -DELAY- 1 hour prior to meeting
- Send email with 1-hour reminder
    - “We have been preparing for your call. We are looking forward to seeing you in an hour!”
- Send text message
    - “Your meeting with *Company Name* is in 1 hour. See you soon!”
- -DELAY- 1 hour post meeting
- Send internal notification for follow up



Meeting No Show Workflow

[YouTube Educational Resource]

Purpose
To reengage a lead that does not show up to a scheduled meeting.

Goal
The goal of this workflow is to get a lead to rebook with your sales team when they do not show up to a previously scheduled meeting.

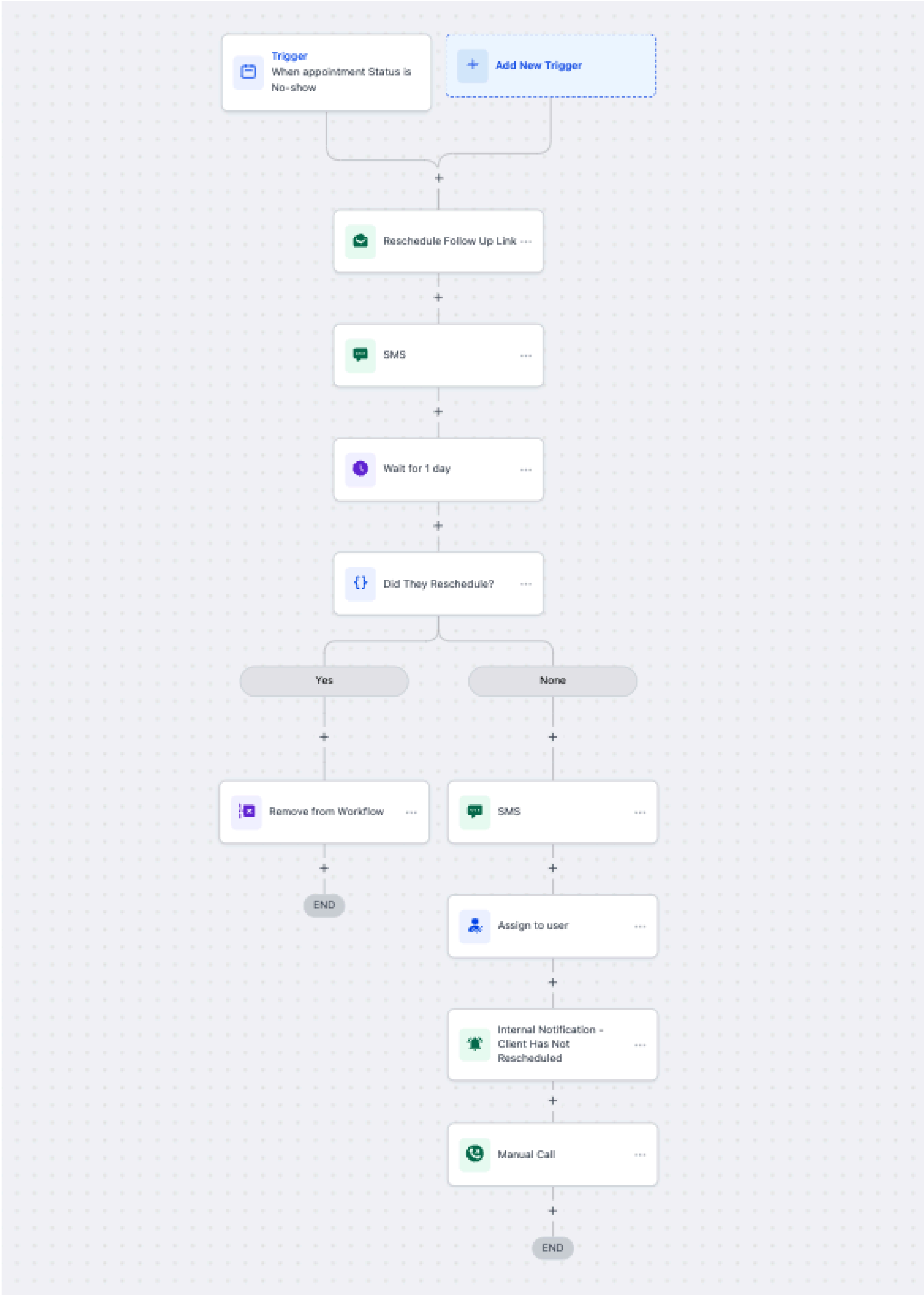
Setup

- Trigger: Meeting Outcome = No Show
- Workflow Goal: Meeting Re-booking

Integrations Needed
- Calendar Integration (Meeting Links)
- Virtual Meeting Platform (ie. Zoom)
- SMS Integration
- Email Integration

Workflow Dependency (what other workflows are needed to optimize this workflow)
- N/A

Steps
- Send email from Sales Representative
    - “Hi *Contact Name*, This is *Avatar Name* with *Business Name*. We missed you on the meeting today! I assure you that this meeting is worth your time. Let’s get you rescheduled for another time (meeting hyperlink). If you don’t go, you won’t know!”
- Send text message #1 from avatar
    - “We missed you on your meeting today! Can you choose a time that works better for you? You won’t want to miss this again. *Insert short code hyperlink to meeting booking page*”
- Wait 1 day
- Check for meeting booking (goal). If no meeting has been booked, continue to next step
- Send text message #2 with CTA
    - “Feel free to book a 15 minute call with the team here: *Insert short code hyperlink to meeting booking page*”
- Assign to user
- Send internal notification alerting user the client hasn’t rescheduled
- Manual call


Trigger
When appointment Status is No-show
Add New Trigger
Reschedule Follow Up Link
SMS
Wait for 1 day
Did They Reschedule?
Yes
None
Remove from Workflow
END
SMS
Assign to user
Internal Notification - Client Has Not Rescheduled
Manual Call
END

Upsell Paid Customer

Purpose
To reengage a lead that does not show up to a scheduled meeting.

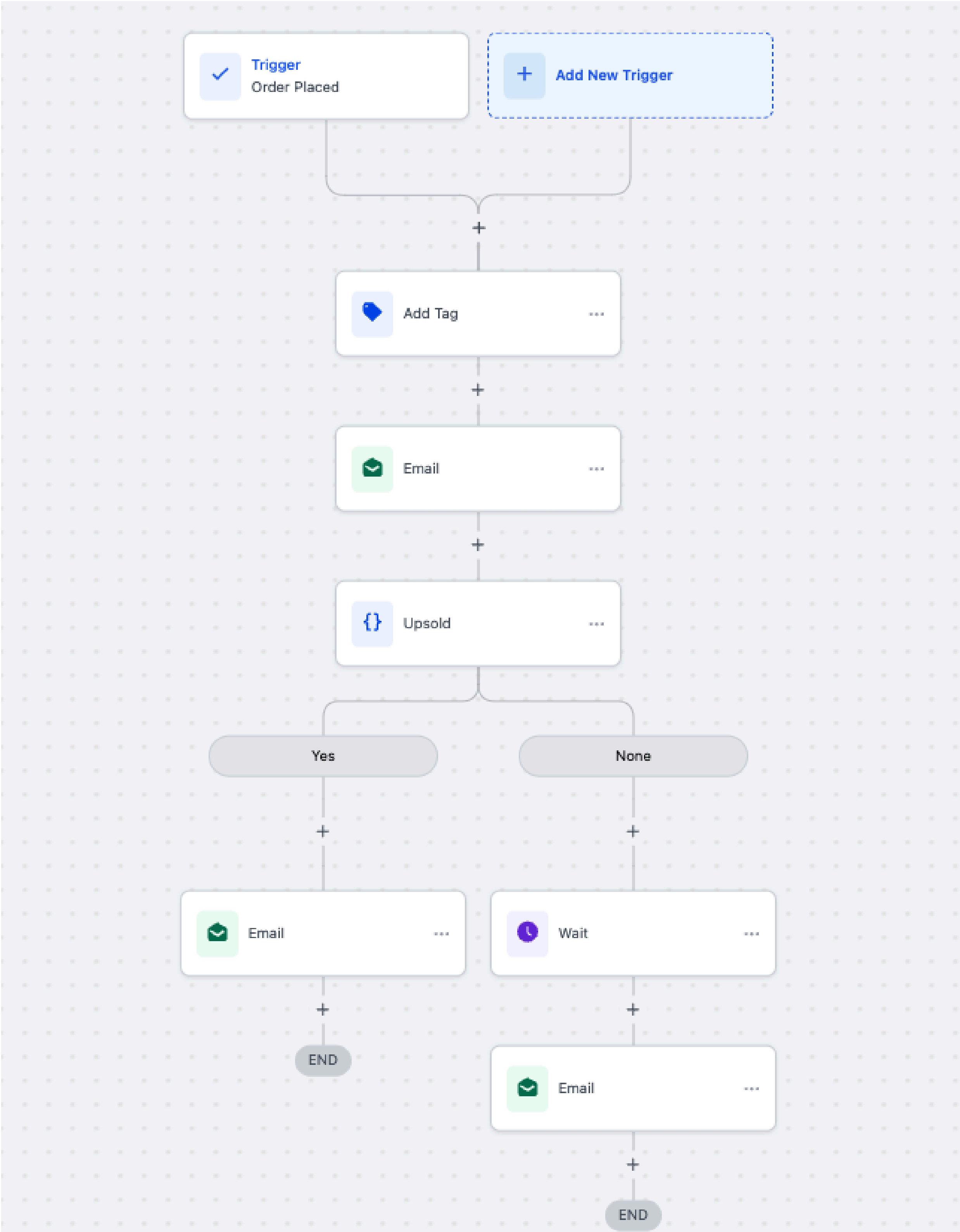
Goal
The goal of this workflow is to get a lead to rebook with your sales team when they do not show up to a previously scheduled meeting.

Setup
- Trigger: Meeting Outcome = No Show
- Workflow Goal: Meeting Re-booking

Integrations Needed
- Calendar Integration (Meeting Links)
- Virtual Meeting Platform (ie. Zoom)
- SMS Integration
- Email Integration

Workflow Dependency (what other workflows are needed to optimize this workflow)
- N/A

Steps
- Send email from Sales Representative
  - "Hi *Contact Name*, This is *Avatar Name* with *Business Name*. We missed you at your meeting today! I assure you that this meeting is worth your time. Let's get you rescheduled for another time (meeting hyperlink). If you don't go, you won't know!"
- Send text message #1 from avatar
  - "We missed you at your meeting today! Can you choose a time that works better for you? You won't want to miss this again. *Insert short code hyperlink to meeting booking page*"


Trigger
Order Placed
Add New Trigger
Add Tag
Email
Upsold
Yes
None
Email
Wait
END
Email
END

Lead Nurture

[YouTube Educational Resource]

Purpose
To determine if lead qualifications are met depending on business determined metrics. If qualifications are met, lead contact is created, marketing is distributed, and a sales team member is assigned the lead and a task for outreach.

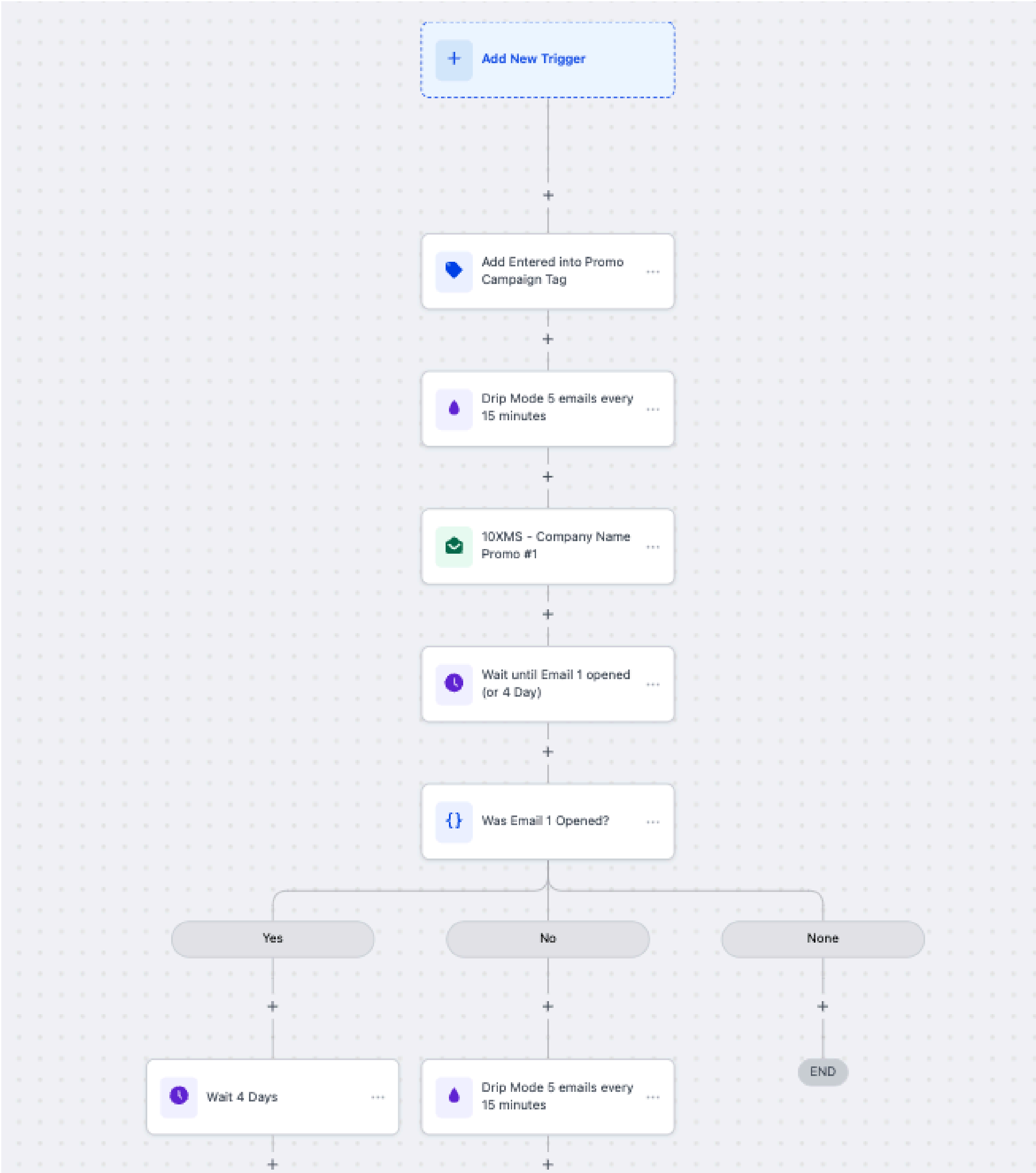
Goal
The goal of this workflow is to automate lead quality and if met, connect with qualified leads immediately and to assign sales team members to connect with qualified leads.

Setup
- Trigger: N/A
- Workflow Goal: Connect sales team to qualified leads

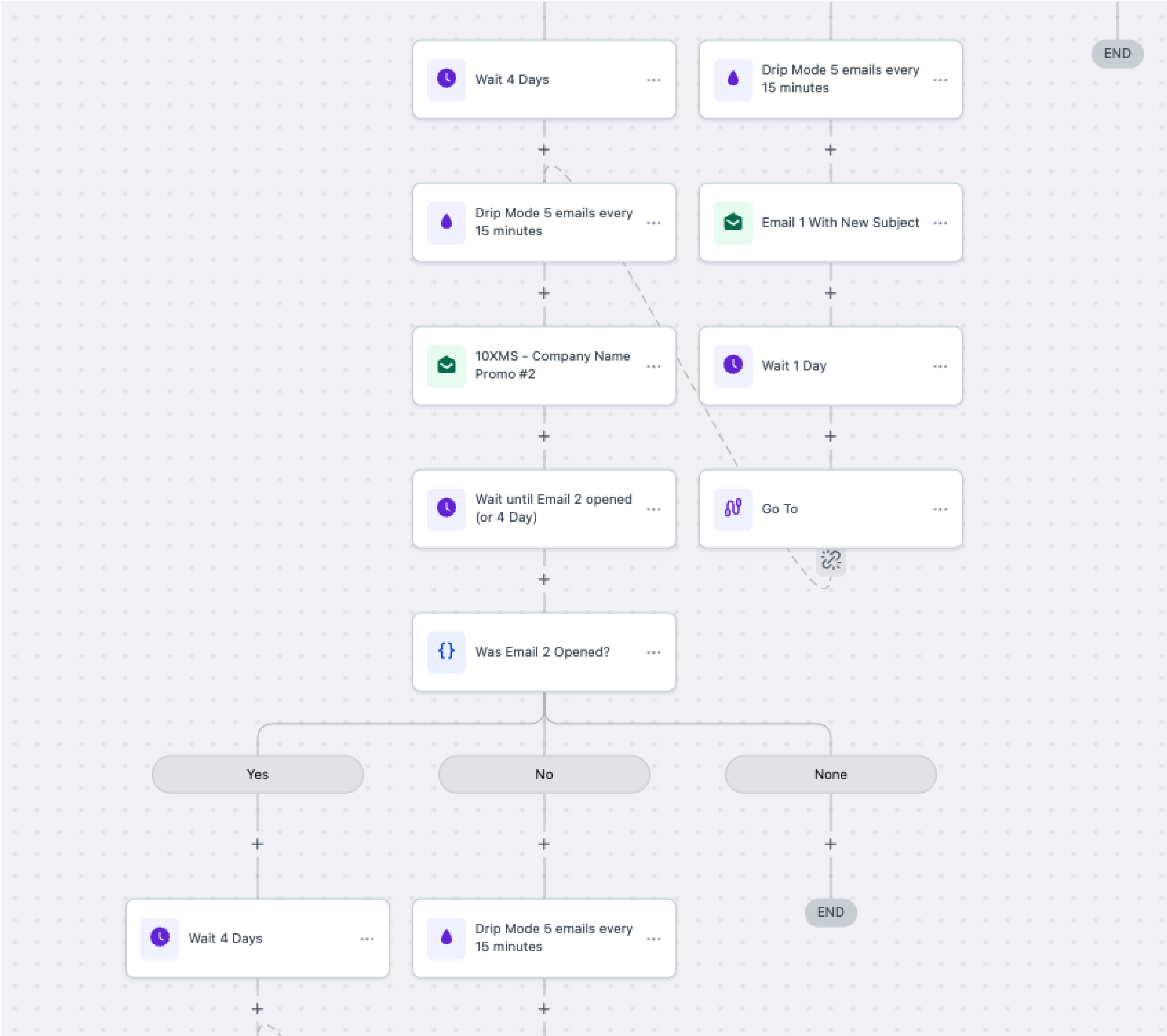
Integrations Needed
- Calendar Integration
- SMS Integration
- Email Integration

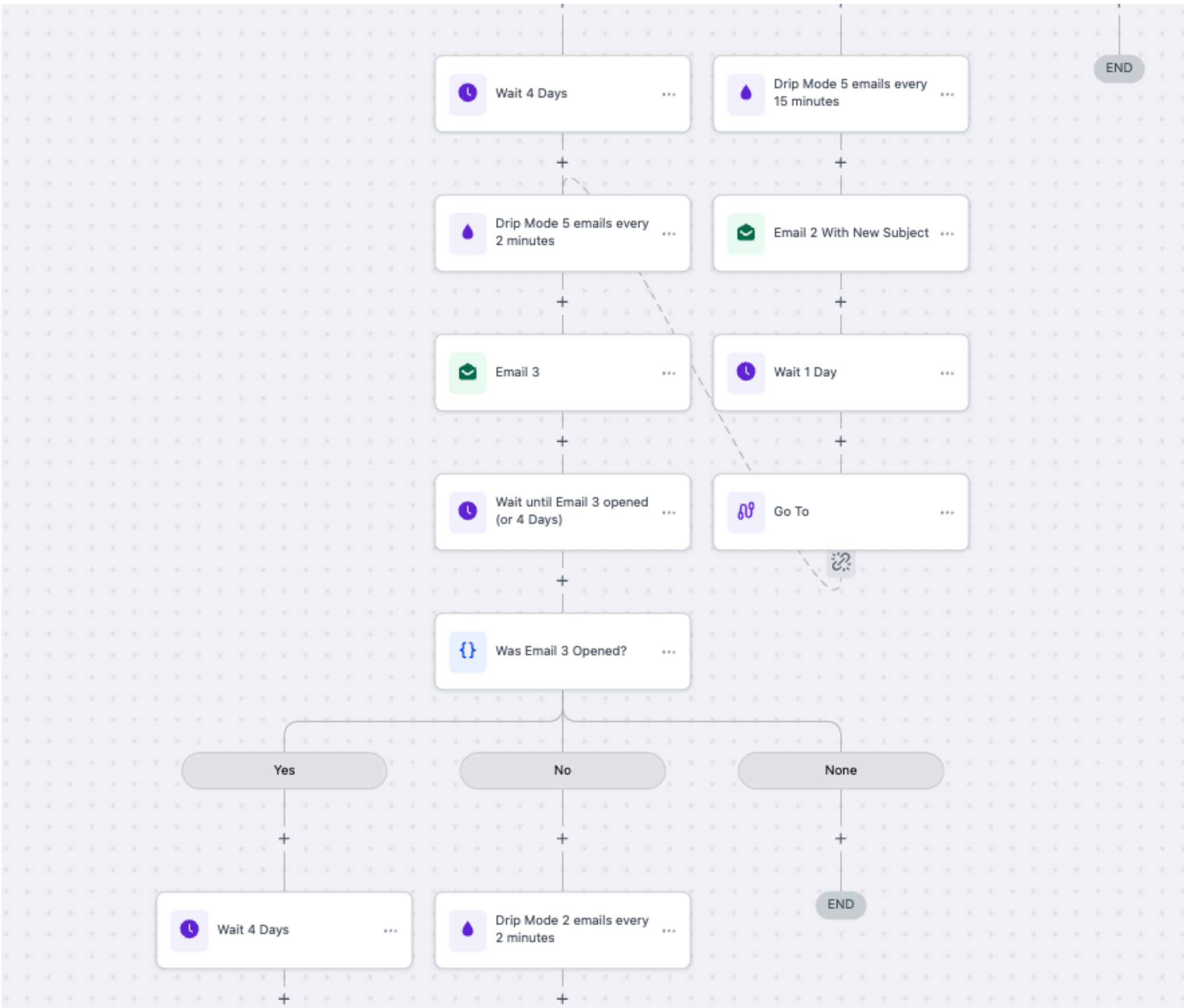
Workflow Dependency (what other workflows are needed to optimize this workflow)
- N/A

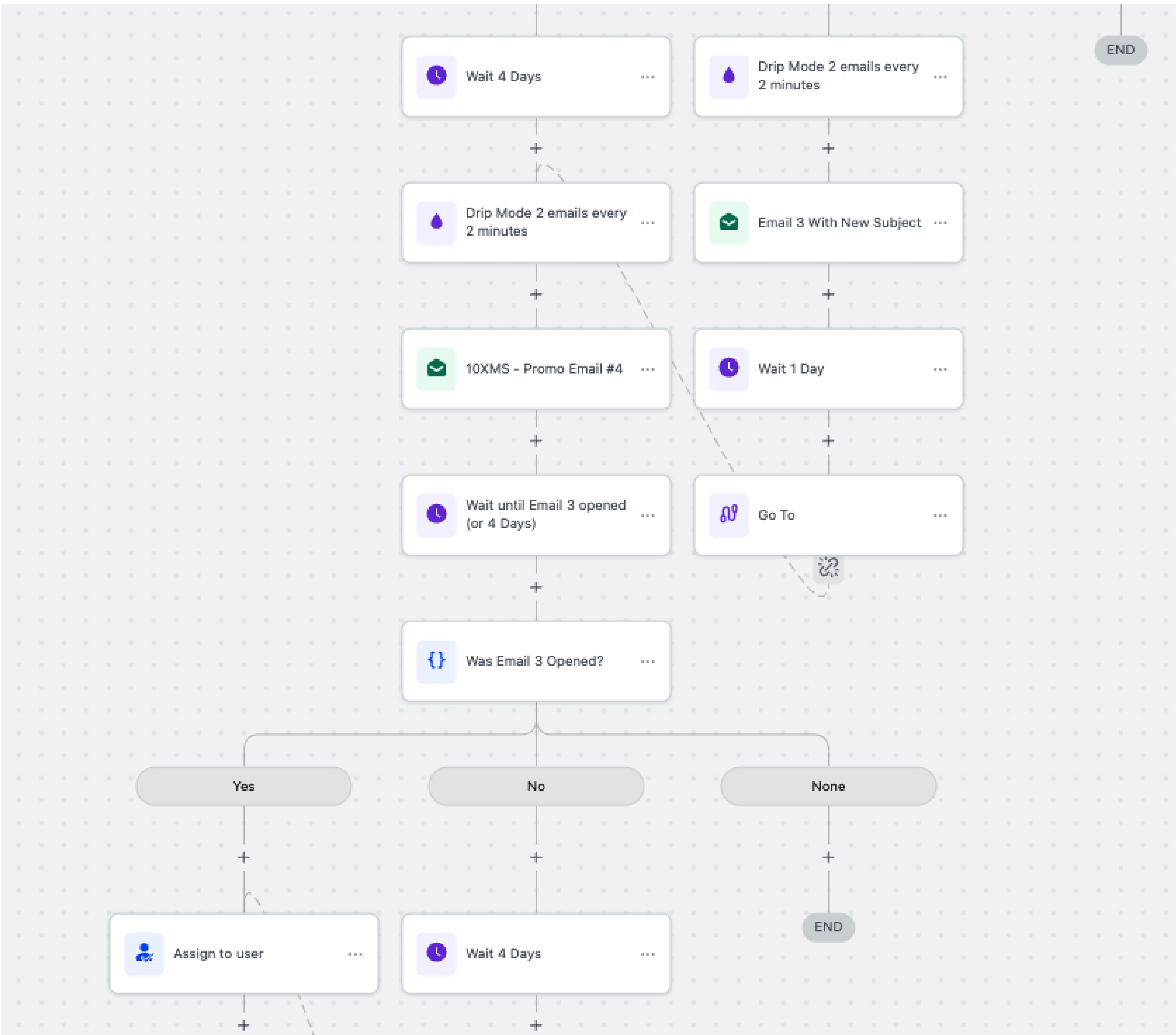
Steps
- Add tag to contact
- Send Personalized Welcome Email with a Call To Action
    - "Hi *Contact Name*, This is *Avatar Name* with *Business Name*. *Insert Welcome Email
- Determine if email was opened
- Add tag to contact

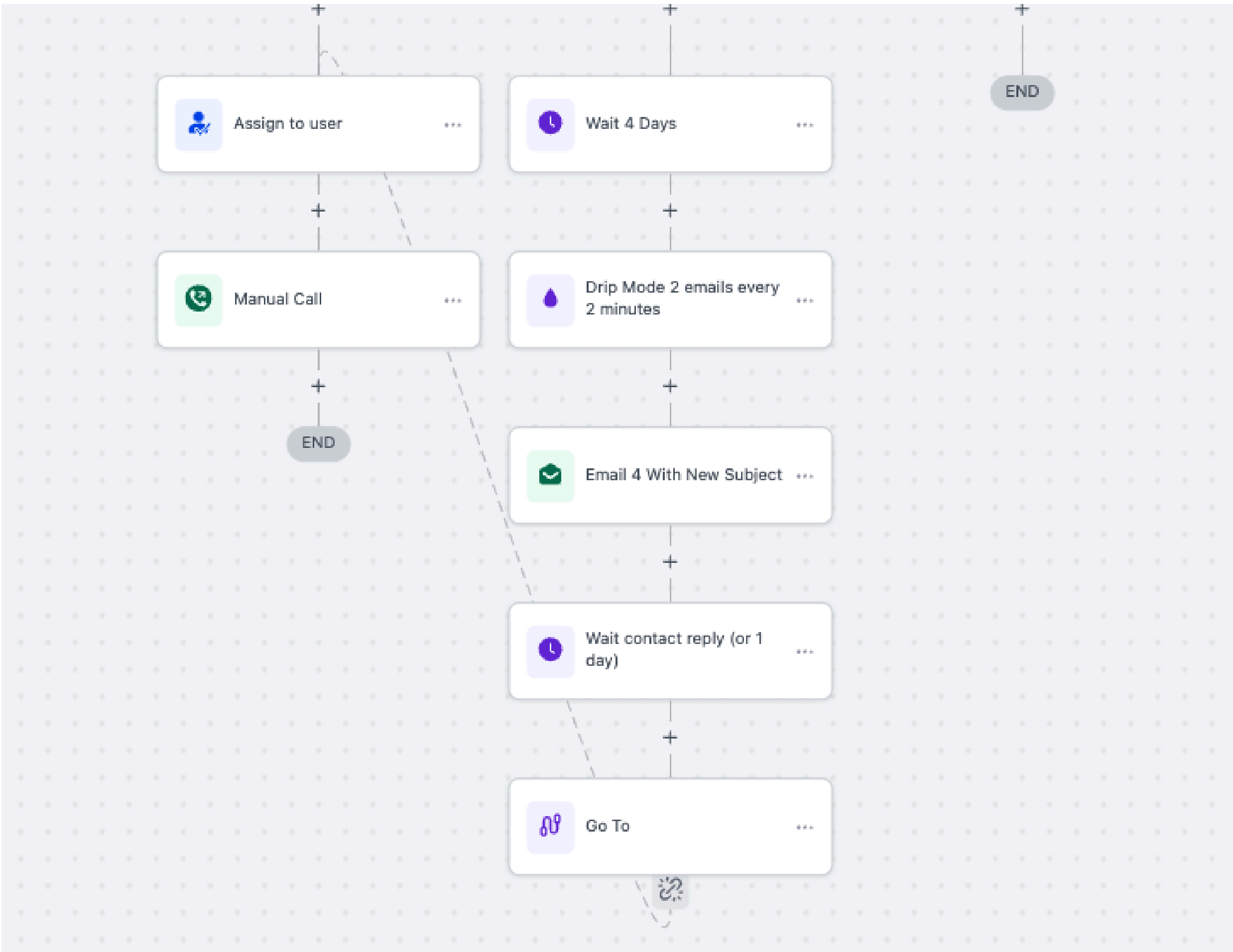


CARDONE VENTURES


END
Wait 4 Days
Drip Mode 5 emails every 15 minutes
Drip Mode 5 emails every 15 minutes
Email 1 With New Subject
10XMS - Company Name Promo #2
Wait 1 Day
Wait until Email 2 opened (or 4 Day)
Go To
Was Email 2 Opened?
Yes
No
None
Wait 4 Days
Drip Mode 5 emails every 15 minutes
END


END
Wait 4 Days
Drip Mode 5 emails every 15 minutes
Drip Mode 5 emails every 2 minutes
Email 2 With New Subject
Email 3
Wait 1 Day
Wait until Email 3 opened (or 4 Days)
Go To
Was Email 3 Opened?
Yes
No
None
Wait 4 Days
Drip Mode 2 emails every 2 minutes
END


Wait 4 Days
Drip Mode 2 emails every 2 minutes
END
Drip Mode 2 emails every 2 minutes
Email 3 With New Subject
10XMS - Promo Email #4
Wait 1 Day
Wait until Email 3 opened (or 4 Days)
Go To
Was Email 3 Opened?
Yes
No
None
END
Assign to user
Wait 4 Days



Won Customer Product Feedback Workflow

[YouTube Educational Resource]

Purpose

To connect with a won customer on a product/service provided to ensure high-touch customer communication and to receive feedback on customer experience.

Goal

The goal of this workflow is to continue engagement with won customers and to ensure customer satisfaction and receive feedback on your product/service provided.

Setup

- Trigger: Opportunity Status Changed + Status Moved to Won
- Workflow Goal: Connect the sales team to qualified leads

Integrations Needed

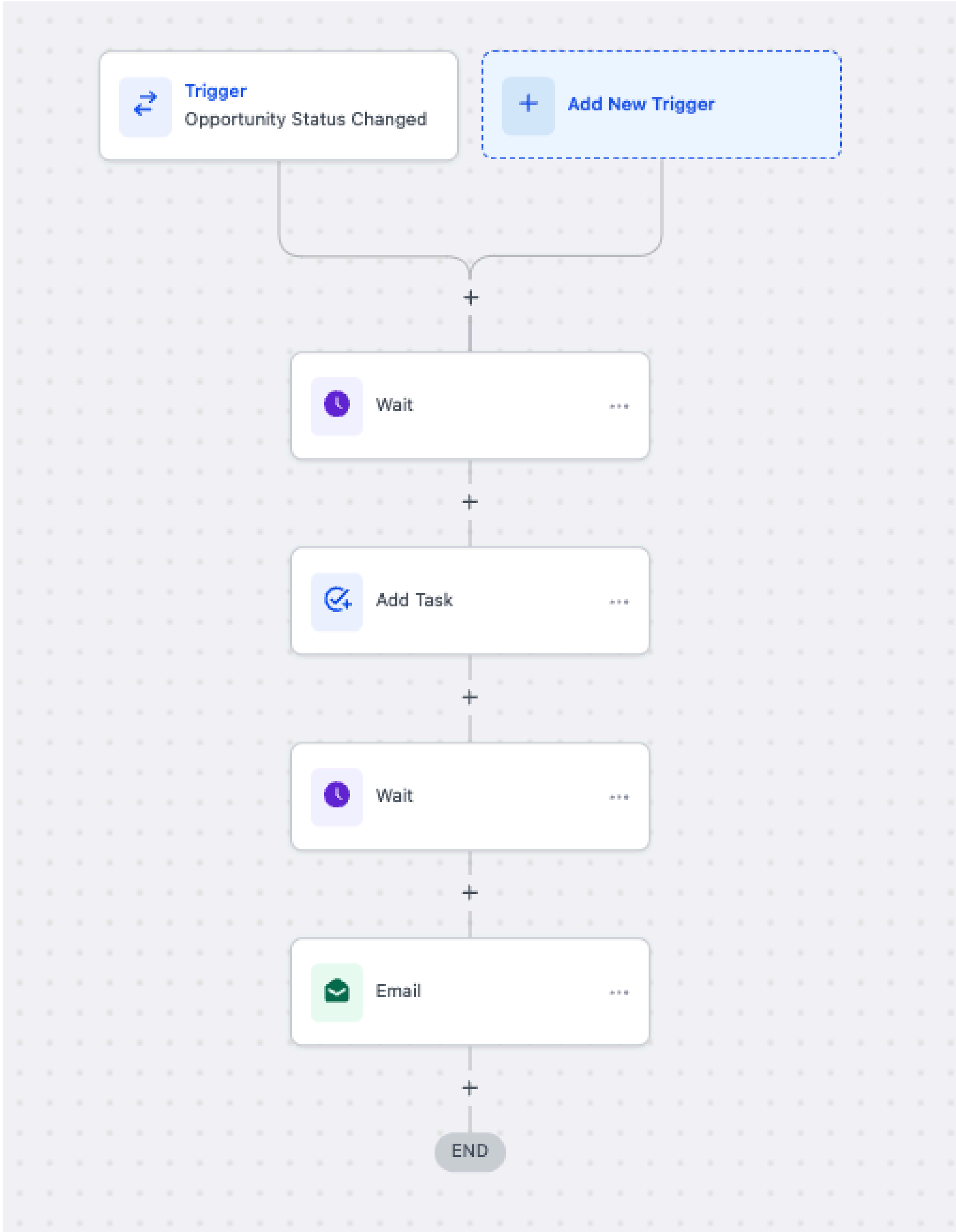
- Calendar Integration
- SMS Integration
- Email Integration

Workflow Dependency (what other workflows are needed to optimize this workflow)

- N/A

Steps

- Wait 3 days to reach out to Won Customer
- Add task for internal team member to reach out to Won Customer
- Wait 24 hours
- Email Won Customer with Feedback Email



Review Requested Workflow

[YouTube Educational Resource]

Purpose

To connect with a won customer on a product/service provided to ensure high-touch customer communication and to receive feedback on customer experience.

Goal

The goal of this workflow is to continue engagement with won customers and to ensure customer satisfaction and receive feedback on your product/service provided to showcase to future customers.

Setup

- Trigger: Opportunity Status Changed + Status Moved to Won Closed
- Workflow Goal: Gather a five star review from the won customer.

Integrations Needed

- Calendar Integration
- SMS Integration
- Email Integration

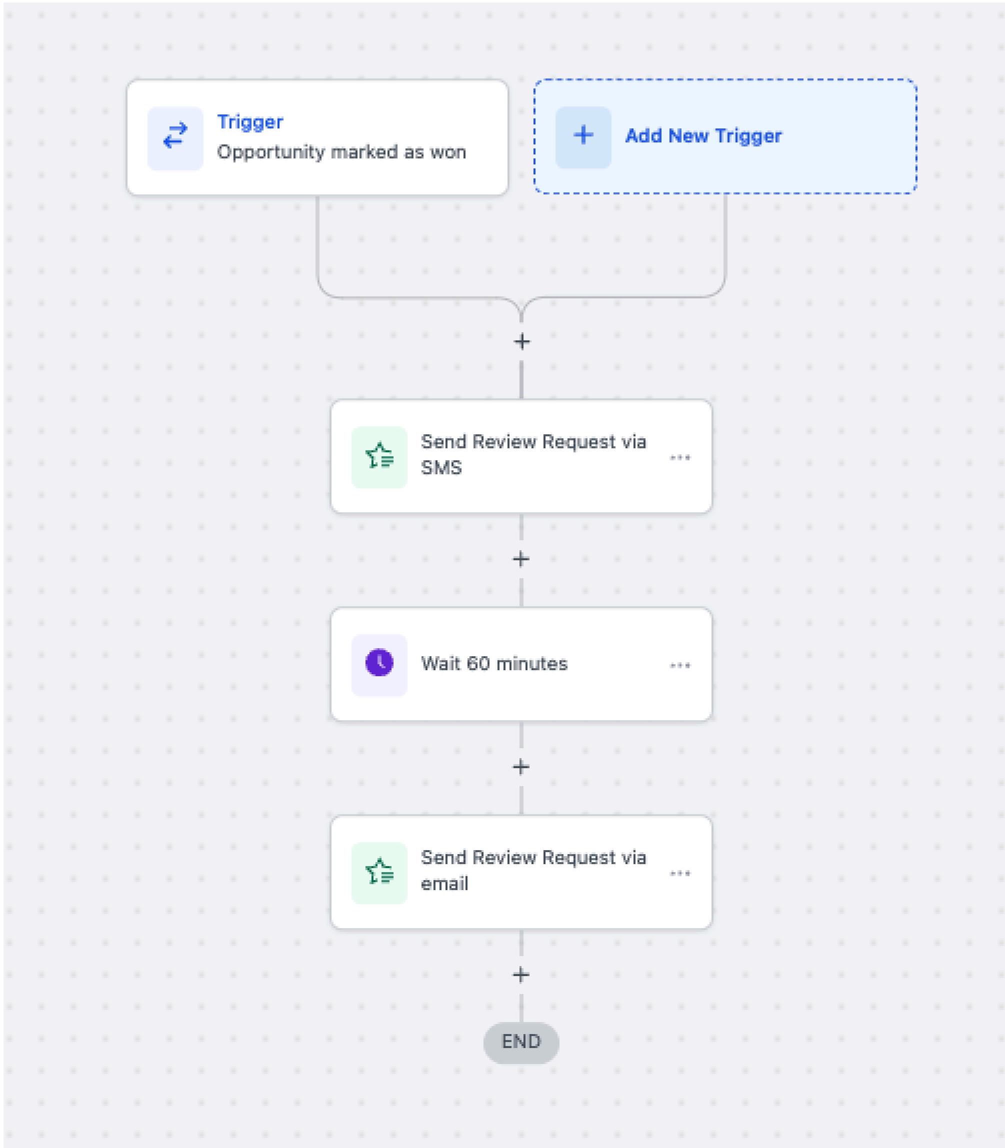
Workflow Dependency (what other workflows are needed to optimize this workflow)

- N/A

Steps

- SMS Won Customer with Feedback Request
- Wait 24 hours
- Email Won Customer with Feedback Request Email

Review Request



Job Completed - Send Invoice

Purpose: Sending an invoice to a won customer.

Goal: The goal of sending the invoice is to collect payment on the won customer without having to manually send the invoice.

Setup

- Trigger: Opportunity Changed + Status updated to won.
- Workflow Goal: To collect payment on rendered services.

CARDONE VENTURES

Integrations Needed

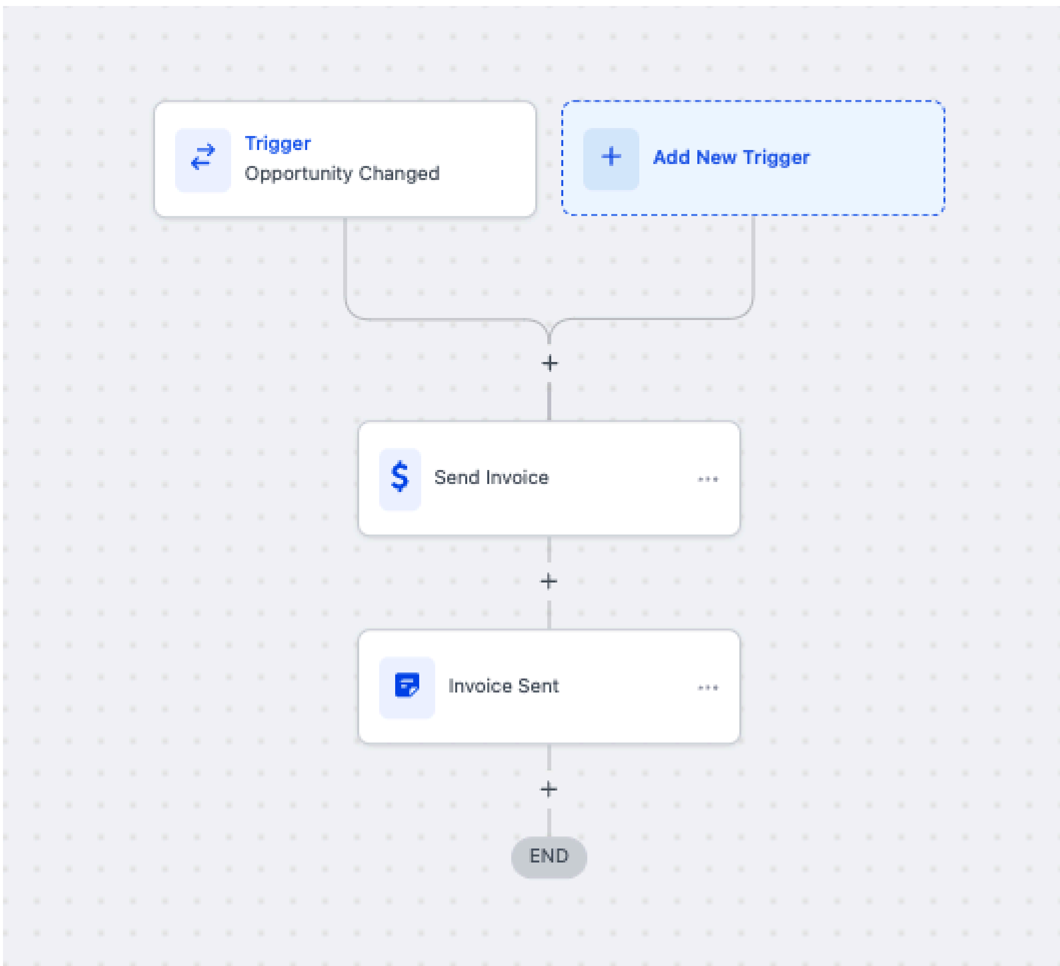
- Payment Gateway Integration
- Email Integration

Workflow Dependency (what other workflows are needed to optimize this workflow)

- N/A

Steps

- Opportunity status changed to Won
- Invoice is sent
- Invoice has been sent to client note added to contact



Contact Lead Score Workflow

Purpose: Lead Scoring is used to assign a point value to the leads in your system in order to see how engaged they are with your messaging.

Goal: The goal of lead scoring is to let your sales representatives know when a prospect is ready for your message. It helps them to prioritize their daily outreach. The higher the lead score, the higher up the priority list.

Setup

- Trigger: Contact Changed + Lead Score 15 points or higher
- Workflow Goal: Connect highly engaged leads to sales rep immediately for increased chance of won deals with high lead scoring customer.

Integrations Needed

- Calendar Integration
- SMS Integration
- Email Integration

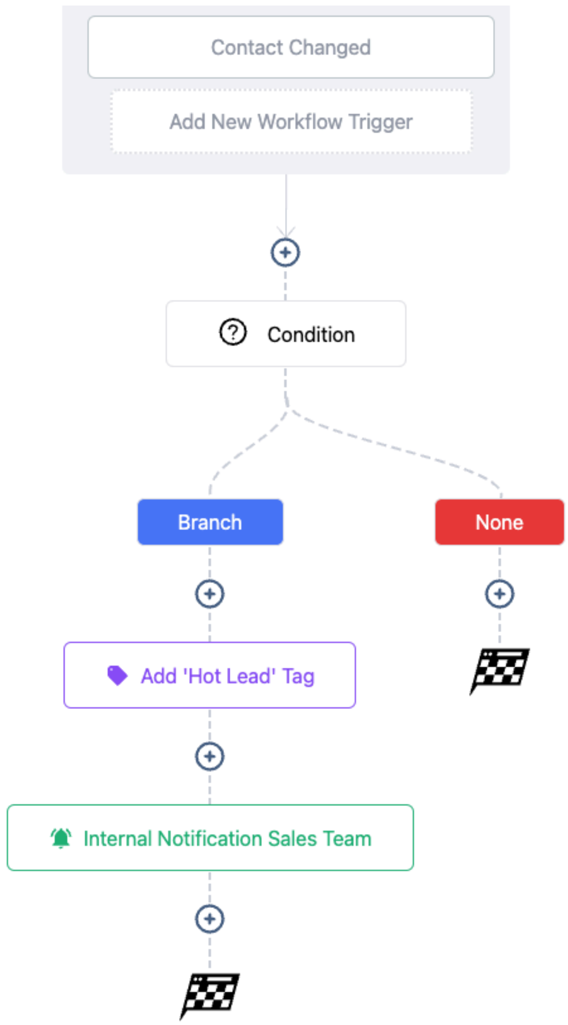
Workflow Dependency (what other workflows are needed to optimize this workflow)

- N/A

Steps

- Contact Changed in custom field for Lead Score (Trigger)
- Condition → Math Equation→ Branch, Segment Lead Score Greater than or Equal to 15
- Add tag to contact card 'Hot Lead'
- Send SMS to Sales representative to reach out to prospect immediately.

Contact Lead Score is 15 or Higher



Contact Engagement Score

Purpose

To alert stakeholders that a contact/lead has reached a certain level of engagement.

Goal

The objective of this workflow is to automatically notify stakeholders when specific contacts achieve a predefined threshold of engagement, prompting them to initiate targeted outreach aimed at improving conversion rates. Additionally, the workflow will send an email and text message to the engaged contacts expressing gratitude for their support and providing them with a discount coupon or code as an incentive for further interaction.

Setup

- Trigger: Contact Engagement Score
- Workflow Goal: Conversion

Integrations Needed

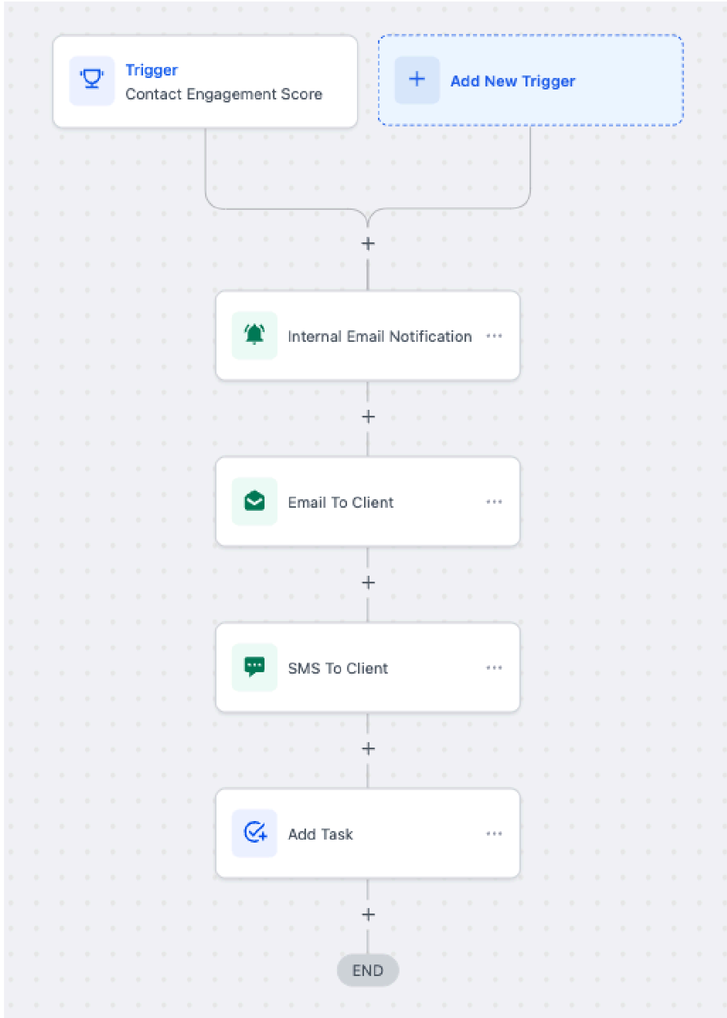
- SMS integration (Text Messages)
- Email Integration (Emails)

Workflow Dependency (what other workflows are needed to optimize this workflow)

- N/A

Steps

- Send internal notification to assigned user
- Send email to contact
- Send text message to contact
- Add task to assigned user



Invoice Sent + Follow Up

[YouTube Educational Resource]

Purpose
To remind the contact that there is an outstanding invoice due.

Goal
The goal of this workflow is to automatically send reminders to contacts when their invoice is due, ensuring timely payment. Simultaneously, it triggers an internal notification to stakeholders, prompting them to follow up with the contact if necessary, thereby facilitating efficient invoice management and ensuring smooth financial transactions.

Setup
- Trigger: Invoice Sent
- Workflow Goal: Paid Invoice

Integrations Needed

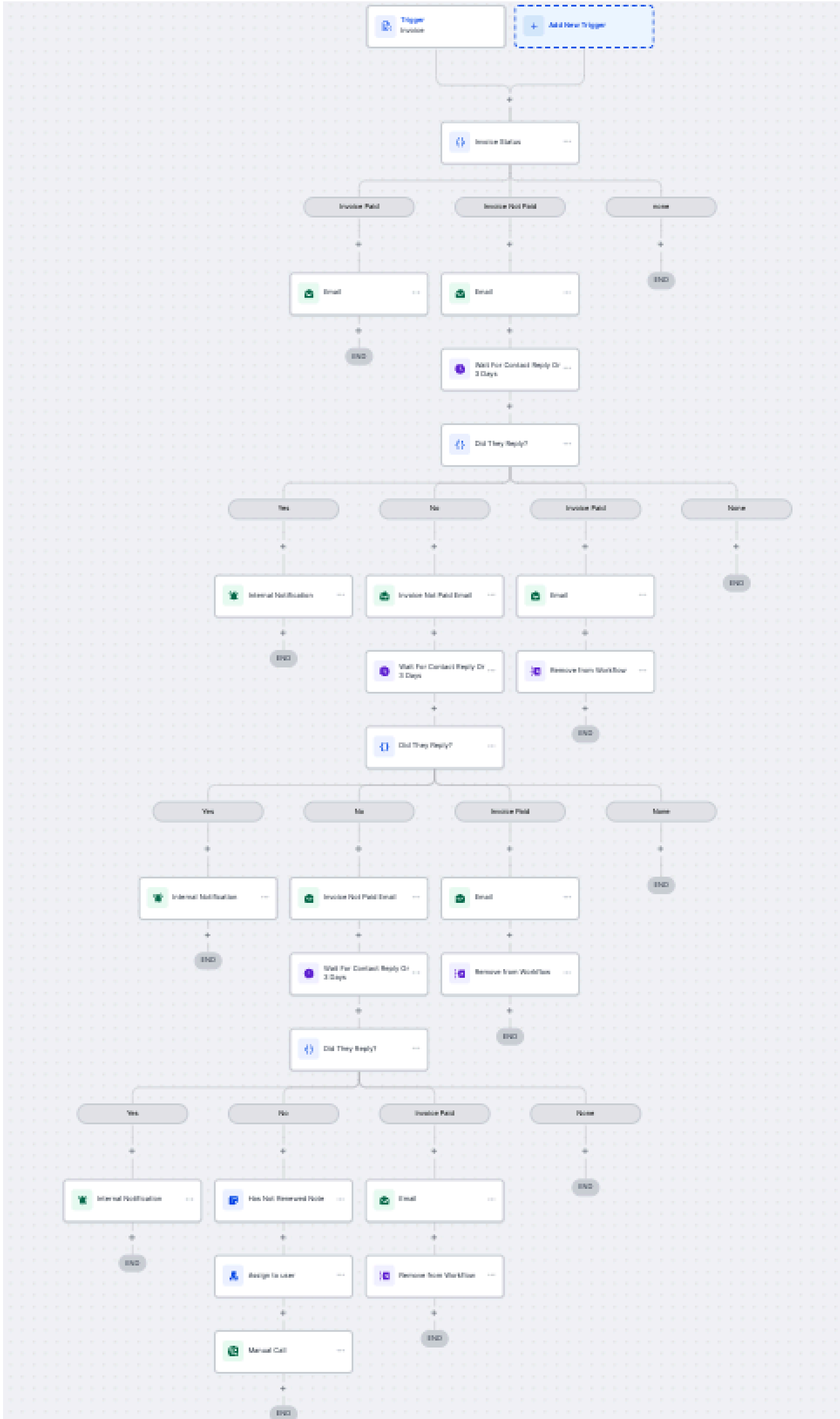
- SMS integration (Text Messages)
- Phone Integration (For Manual Calling)
- Payment Gateway Integration (For Accepting Payment)

Workflow Dependency (what other workflows are needed to optimize this workflow)

- N/A

Steps

- Send email notification to contact
- Send reminder email notification to contact if not paid after 3 days
- Send internal notification to user if contact has not paid
- Set contact in manual call if they have not paid



Lead Generation Maching - FB & IG Post (Keyword Response)

[YouTube Educational Resource]

Purpose

To streamline the lead generation process, optimize lead engagement, and facilitate seamless transition into further marketing efforts for sustained client nurturing and conversion.

Goal

The objective of this workflow is to serve as an automated Lead Generation Machine, leveraging Facebook (FB) and Instagram (IG) Direct Messages (DMs) to engage with potential clients who express interest by commenting with specific keywords, such as 'info,' on promotional campaign posts. Once triggered by these keyword comments, the workflow will initiate tailored conversation paths aimed at eliciting further interest, capturing the contact's email address, and scheduling a consultation with an expert.

Setup

- Trigger: Instagram and Facebook Comment Trigger
- Workflow Goal: N/A

Integrations Needed

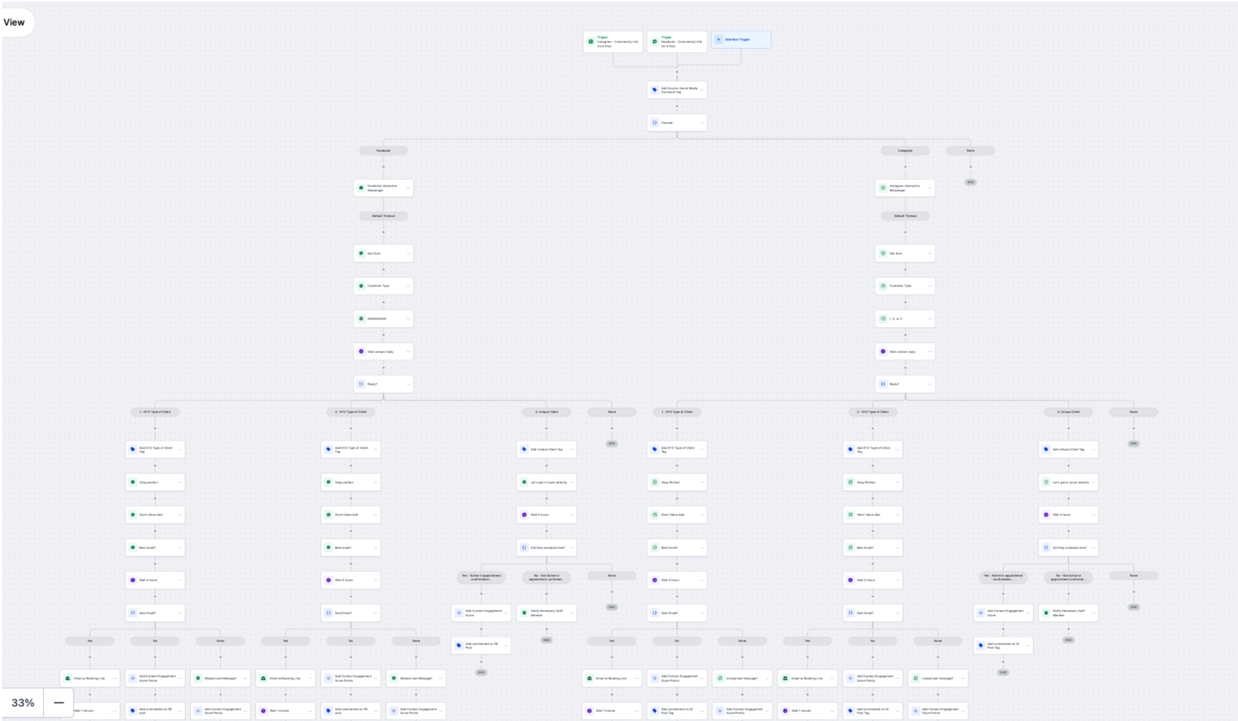
- SMS integration (Text Messages)
- Email Integration (Emails)
- Social Media Integration (Instagram and Facebook)

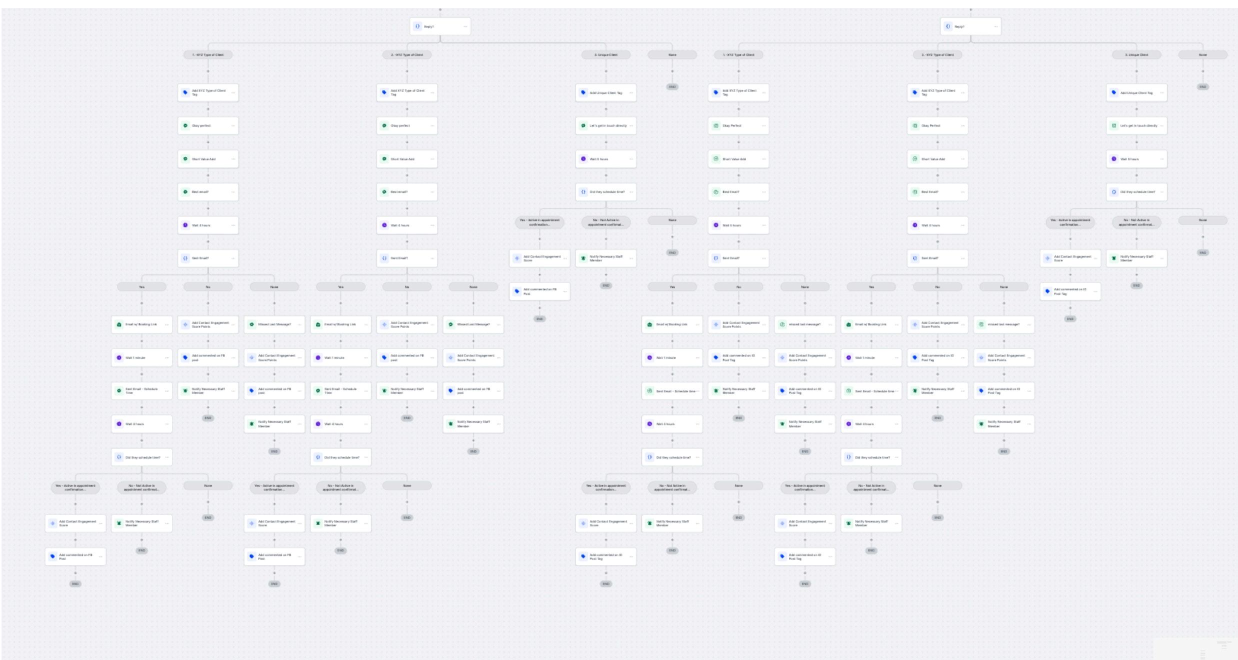
Workflow Dependency (what other workflows are needed to optimize this workflow)

- N/A

Steps

- Facebook/Instagram interactive chat
- Add Tag
- Send email to contact
- Send internal notification to assigned user





Newsletter Opt-in

[YouTube Educational Resource]

Purpose
Automatically prompt new Marketing Qualified Leads (MQLs) to opt-in to the client's newsletter, facilitating ongoing customer engagement and providing valuable updates on business activities.

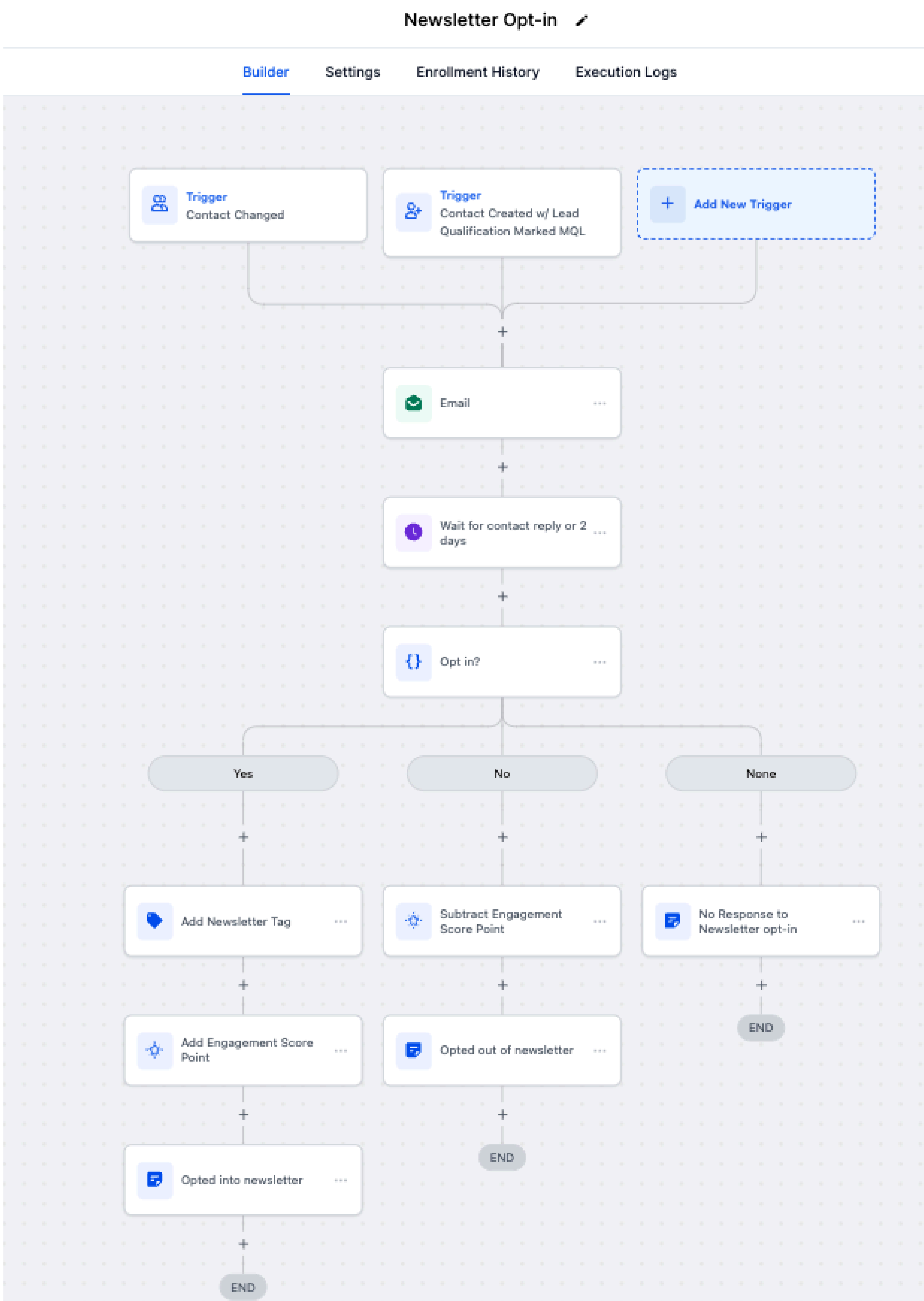
Goal
The goal of this workflow is to seamlessly integrate new Marketing Qualified Leads (MQLs) into the client's newsletter subscription list by automatically triggering an email invitation upon lead qualification. This initiative aims to establish a direct line of communication with potential customers, offering them valuable content and updates relevant to their interests and the client's business. By facilitating opt-in to the newsletter, the workflow enhances customer engagement, fosters ongoing interaction, and enriches the overall customer experience.

Setup
- Trigger: Contact Changed/Contact Created
- Workflow Goal: Opt-in to Newsletter

Integrations Needed
- SMS integration (Text Messages)
- Email Integration (Emails)
- Social Media Integration (Instagram and Facebook)

Workflow Dependency (what other workflows are needed to optimize this workflow)
- N/A

Steps
- Send email to contact
- Contact Ops-In or Out
- Add/Subtract Engagement Score
- Tag Added



Newsletter Opt-in
Builder
Settings
Enrollment History
Execution Logs
Trigger
Contact Changed
Trigger
Contact Created w/ Lead Qualification Marked MQL
Add New Trigger
Email
Wait for contact reply or 2 days
Opt in?
Yes
No
None
Add Newsletter Tag
Subtract Engagement Score Point
No Response to Newsletter opt-in
Add Engagement Score Point
Opted out of newsletter
END
Opted into newsletter
END
END