Get Started with a

SAMPLE WORKFLOW

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A NOTE FROM THE AUTHOR

WELCOME, MY BEAUTIFUL FRIEND.

A CRM workflow is a series or collection of steps required to complete a business process such as making a sale or responding to a customer complaint. You can think of a CRM workflow as a line of dominoes you need to knock over to get from an initial trigger to your desired outcome. It is a step by step that allows us to work smarter not harder and focus on what is more important in business while still making our clients a priority.
The goal as you build your personalized CRM workflow is to be able to be professionally prepared for the client onboarding, engagement, and retainment without you having to do a ton of manual labor.

In this ebook you will see a written step by step example of a workflow.

If you have questions or would like to set up an appointment to walk through your CRM workflow, feel free to reach out and set an appointment.

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Sample WORKFLOW

STEPS ON A SIMPLE WORKFLOW (LEAD GENERATION):

1.Potential Lead sees a social media post with a link for your business:
This could be a freebie, a simple graphic that they relate to, or an upcoming

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email to welcome them and get them excited for upcoming things and even offer a link for them to schedule a discovery call with you to ask additional questions.

a. You can also generate a task to a selected team member(s) to reach out and follow with that potential lead so many days after the person receives the freebee or completes the training (the CRM system will call this a delay)

STEPS ON A SIMPLE WORKFLOW (LEAD GENERATION):

1.Potential lead books a discovery call

a. After discovery call, automatically generate an email with a link to the recording from their meeting and letting them know they will receive another email with proposals of possible packages that may work for them (you can customize or tweak packages to fit the need of the potential lead)

b. Potential lead selects an option and notification is sent to a selected staff member.

c. A contract is automatically generated and sent via email to the potential lead inside of the CRM.

d. Potential Lead signs contract and becomes a client (this is automatically changed in system, if possible, in the CRM package you have chosen.

e. Have selected assigned team member either call or send a form via email to gather any additional information you may need and to schedule their first appointment with you.

i. After each meeting make sure there is an automatic email that send them the recording.

STEPS ON A SIMPLE WORKFLOW (LEAD GENERATION):

a. Set up check point emails to automatically go out to your clients at a specific time (7 days, 14 days, 30 days, 60 days). This is part of customer service and making sure that your client is receiving what they need. This will help you quickly identity any bottle necks and make your client feel like a priority.

b. After 60 da days I would suggest meeting with this client to see if they have any additional needs and seeing if you can possibly upsell them to a different package that will assist them in their needs.

2.I f potential lead does not book a discover call from the link

a. After3 days have an email automatically generated to reach out to potential client just letting them know you would lobe to meet with them and to click the link for a discovery call.

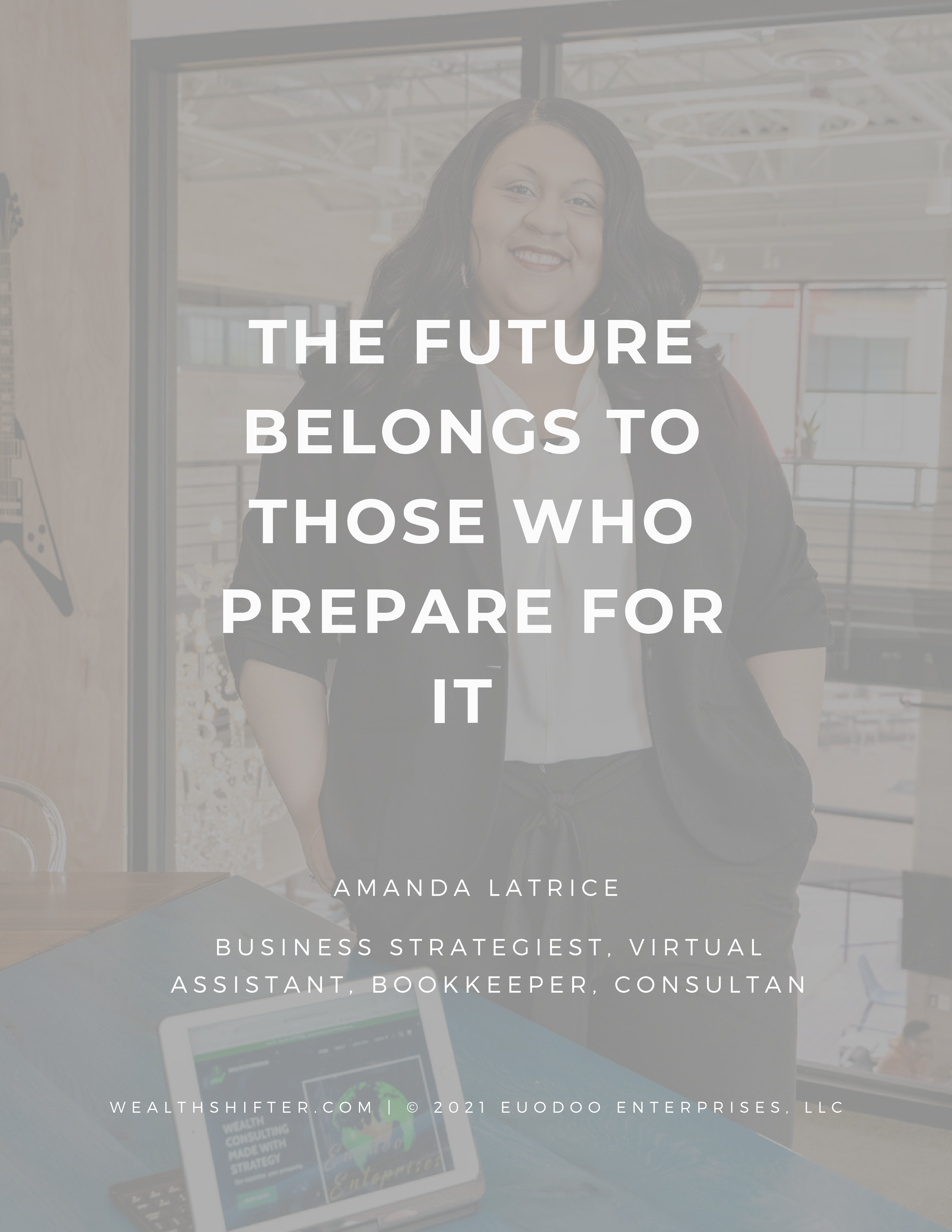
b. Automatically create a task for selected team member to also reach out and speak to the potential lead to schedule a discovery calls on day 7.

c .If potential client has no interest at this time move them to end

d .If the potential lead is interested and schedules a discovery call, then they should go into the same flow as a potential lead that turns to a client.

ADDITIONAL NOTES

There is more than one way to start a workflow. Your starting point determines if your workflow is a lead generation, sales, or deal workflow. More complex workflows will intertwine the three types of workflows. It is important to look at what you would like automated and what you would like to keep as a touch between you and the potential lead/client.



THE FUTURE BELONGS TO THOSE WHO PREPARE FOR IT

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