Lead Management Form

(7) Get These to "0" before I leave	Which Form?	Which box should I check?	What happens?
Requested PPP - Send it	Lead Management	PPP mailed	An e-mail is sent to the prospect letting them know that the PPP has been mailed and that you'll follow up in a few days to make sure they received it, and to answer any questions. In 3 days you'll be prompted (via dashboard) to "Make PPP receipt follow-up call"
Make PPP receipt follow-up call	Lead Management	PPP Follow-up Call - Left Message	An e-mail is sent to follow up on your voicemail. Several e-mails will go out over the next couple of weeks encouraging the prospect to reach back out to you with questions reagrding the PPP and to schedule their consult. They are then moved to the Nurture Bucket.
These people need their first call to schedule a consult	Lead Management	Left Message 1	--> A follow up e-mail is sent. Prompted to make the "second call" the following morning.
		Consult Scheduled + Date + Time + Day (optional "Consult Only")	--> Pre-Consult Cultivation e-mails are sent. Moved to the Consult Scheduled bucket.
		Wants to be called on a specific date + Call Back Date	--> You are prompted to follow up on the selected date ("These people need a call back today")
		Solid "No" - Add to Long-term Nurture	--> No content is sent. The contact is moved to the Nurture Bucket for further cultivation.
These people need their second call to schedule a consult	Lead Management	Left Message 2	--> A follow up e-mail is sent. Prompted to make the "third call" the following morning.
		Consult Scheduled + Date + Time + Day (optional "Consult Only")	--> Pre-Consult Cultivation e-mails are sent. Moved to the Consult Scheduled bucket.
		Wants to be called on a specific date + Call Back Date	--> You are prompted to follow up on the selected date ("These people need a call back today")
		Solid "No" - Add to Long-term Nurture	--> No content is sent. The contact is moved to the Nurture Bucket for further cultivation.
These people need their third call to schedule a consult	Lead Management	Left Message 3	--> A follow up e-mail is sent. Moved to the Nurture bucket the following morning.
		Consult Scheduled + Date + Time + Day (optional "Consult Only")	--> Pre-Consult Cultivation e-mails are sent. Moved to the Consult Scheduled bucket.
		Wants to be called on a specific date + Call Back Date	--> You are prompted to follow up on the selected date ("These people need a call back today")
		Solid "No" - Add to Long-term Nurture	--> No content is sent. The contact is moved to the Nurture Bucket for further cultivation.
Record the outcome of these consults	Lead Management	Signed up - New Client + Start Training Date + Total $	--> New Client Onboarding and NPS content starts after the Start Training Date
		Wants to be called on a specific date + Call Back Date	--> You are prompted to follow up on the selected date ("These people need a call back today")
		Missed Consultation	--> A follow up "Wires crossed" e-mail is sent. After 3 days moved to the Nurture bucket.
		Solid "No" - Add to Long-term Nurture	--> No content is sent. The contact is moved to the Nurture Bucket for further cultivation.
These people need a call back today	Lead Management	Consult Scheduled + Date + Time + Day (optional "Consult Only")	--> Pre-Consult Cultivation e-mails are sent. Moved to the Consult Scheduled bucket.
		Wants to be called on a specific date + Call Back Date	--> You are prompted to follow up on the selected date ("These people need a call back today")
		Solid "No" - Add to Long-term Nurture	--> No content is sent. The contact is moved to the Nurture Bucket for further cultivation.

General NPS Form

(2) Get these to "0" before I leave	Which Form(s)?	Which box should I check?	What happens?
These people need a 2 week check-in call (didn't complete NPS survey)	General NPS	Two Week Check-in Complete	No content is sent. Dashboard is cleared.
	NPS (0-8) Form	*optional* Send to Week 2 Referral Sequence	NPS Referral e-mail is sent to client with link for family and friends. Note: This will not clear your dashboard.
These people need to schedule their first (8 week) re-assessment	General NPS	First Re-Assessment Scheduled	No content is sent. Dashboard is cleared.

NPS (9-10) Form

(3) Get these to "0" before I leave	Which Form?	Which box should I check?	What happens?
Week 2 - Make follow up call	NPS (9-10)	9-10 NPS Follow-up Complete (clears all weeks)	NPS referral content has already been sent. Checking the box only indicates that you have completed your follow-up and (if appropriate) delivered reciprocation. No further content is sent and the dashboard is cleared.
Week 8 - Make follow up call	NPS (9-10)	9-10 NPS Follow-up Complete (clears all weeks)	NPS referral content has already been sent. Checking the box only indicates that you have completed your follow-up and (if appropriate) delivered reciprocation. No further content is sent and the dashboard is cleared.
Week 16 - Make follow up call	NPS (9-10)	9-10 NPS Follow-up Complete (clears all weeks)	NPS referral content has already been sent. Checking the box only indicates that you have completed your follow-up and (if appropriate) delivered reciprocation. No further content is sent and the dashboard is cleared.

NPS (0-8) Form

(6) Get these to "0" before I leave	Which Form?	Which box should I check?	What happens?
Week 2 - Make follow up call - requires resolution	NPS (0-8)	(The 1st follow up) Week 2 NPS 0-8 Follow-up Complete	No content is sent. You'll be promted in 14 days for a second follow up to confirm that "the issue" has been resolved.
		Send to Week 2 Referral Sequence	NPS Referral e-mail is sent to client with link for family and friends.
Week 8 - Make follow up call - requires resolution	NPS (0-8)	(The 1st follow up) Week 8 NPS 0-8 Follow-up Complete	No content is sent. You'll be promted in 14 days for a second follow up to confirm that "the issue" has been resolved.
		Send to Week 8 Referral Sequence	NPS Referral e-mail is sent to client with link for family and friends.
Week 16 - Make follow up call - requires resolution	NPS (0-8)	(The 1st follow up) Week 16 NPS 0-8 Follow-up Complete	No content is sent. You'll be promted in 14 days for a second follow up to confirm that "the issue" has been resolved.
		Send to Week 16 Referral Sequence	NPS Referral e-mail is sent to client with link for family and friends.
Week 2 - Make follow up call - confirm resolution	NPS (0-8)	(The 2nd follow up) 0-8 NPS Follow-up Complete (clears all weeks)	No content is sent. Dashboard is cleared.
		Send to Week 2 Referral Sequence	NPS Referral e-mail is sent to client with link for family and friends.
Week 8 - Make follow up call - confirm resolution	NPS (0-8)	(The 2nd follow up) 0-8 NPS Follow-up Complete (clears all weeks)	No content is sent. Dashboard is cleared.
		Send to Week 8 Referral Sequence	NPS Referral e-mail is sent to client with link for family and friends.
Week 16 - Make follow up call - confirm resolution	NPS (0-8)	(The 2nd follow up) 0-8 NPS Follow-up Complete (clears all weeks)	No content is sent. Dashboard is cleared.
		Send to Week 16 Referral Sequence	NPS Referral e-mail is sent to client with link for family and friends.