WITH AMANDA RICHARDS
TUESDAY OCTOBER 20, 2020

Daily Bite Size Training

Topic:
Single Contact Drip
Create 3 Trigggers in your Sales process

Topics/questions from zoom call

Question: Where can I see Single Contact Drip templates?
Answer: We have a presentation shows already built SCD.
Click here to see presentation

Note: In order to see each process the presentation needs to be in presentation mode.

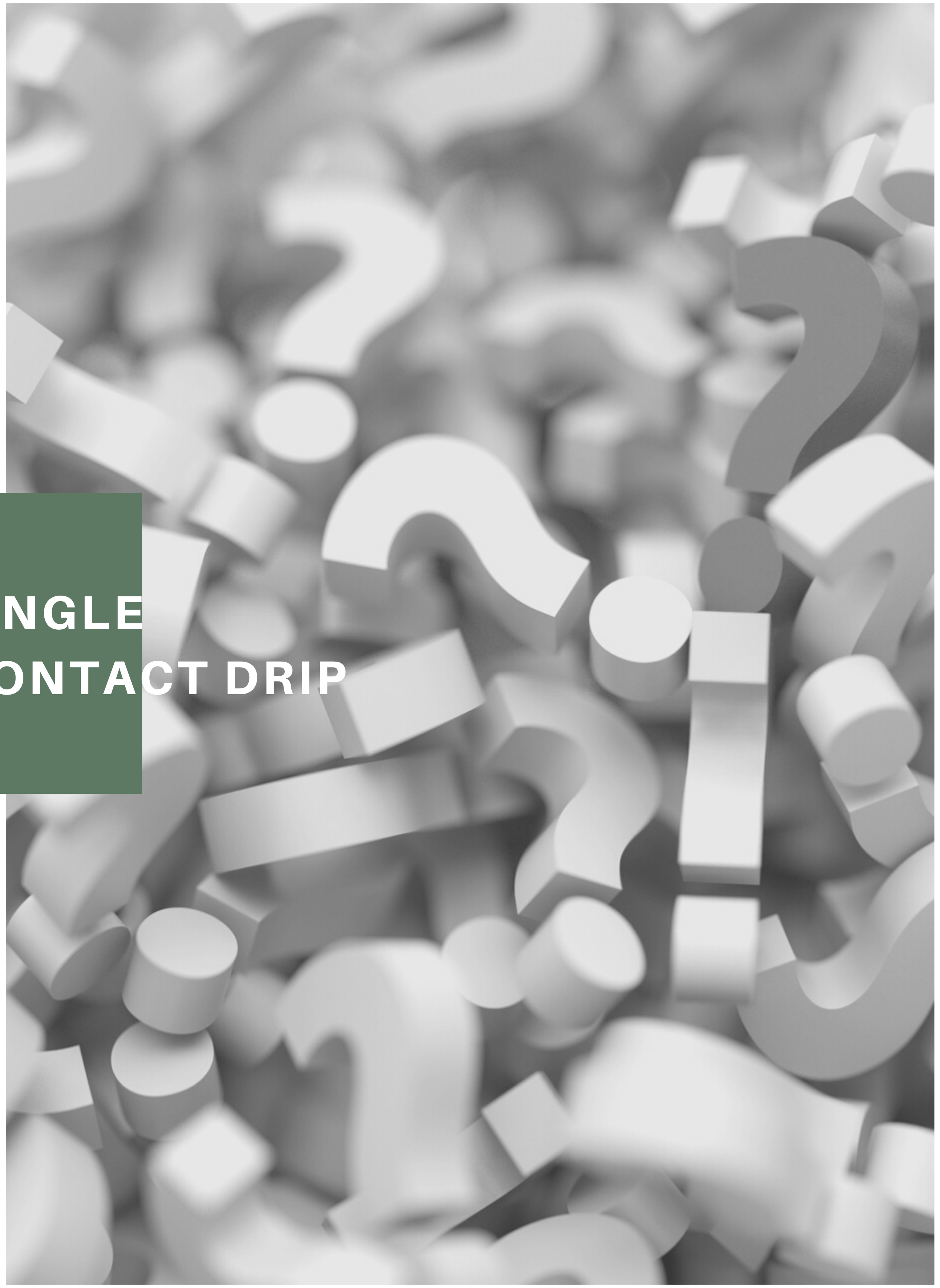
Question: How do I import pre built forms to send out?

Answer: Email support@insuredmine.com your forms and we can add them for you.

Question: Can I create a trigger for moving a deal card from one pipeline to another.

Answer: Right now InsuredMine does not have a trigger for that but we have made note of the request and informed our tech team.

SINGLE CONTACT DRIP



SINGLE CONTACT DRIP

SCD Functionality

1. A NEW CARD IS ADDED
2. THE DEAL CARD STAGE IS CHANGED
3. A NEW CONTACT IS ADDED

How to use?

1.When you add another deal card you will see Start Add Deal Automation checkbox this will trigger automatically start sending the drip emails for the added deal card

2. As soon as deal card stage changes you will receive a pop up to confirm Stage change automation

3. Go to Contacts module, click on Add contact icon, scroll down and you will see the checkbox Start Add Contact

Click here to learn more:
Funnel Graph

Single Contact Drip

Automation can be set for the 4 following triggers:

Adding a Deal Card

When a Deal is won

When a Deal is lost

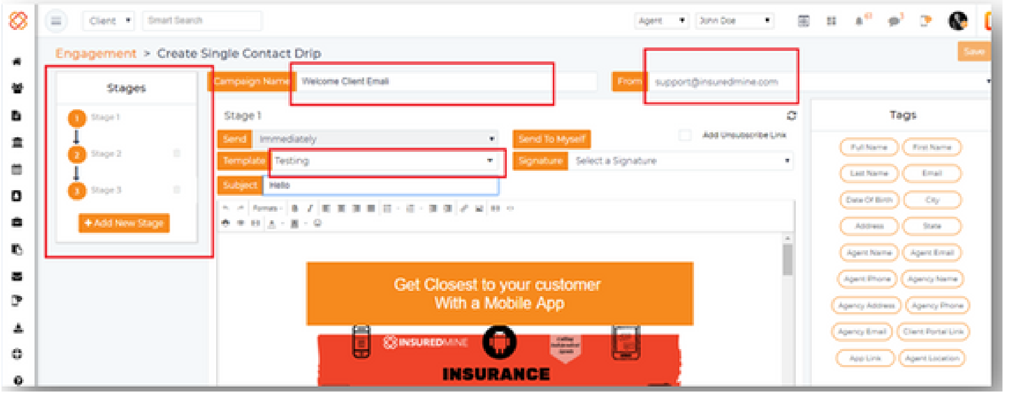
Changing card stage (left to right)

Click here to learn more:

[Single Contact Drip]

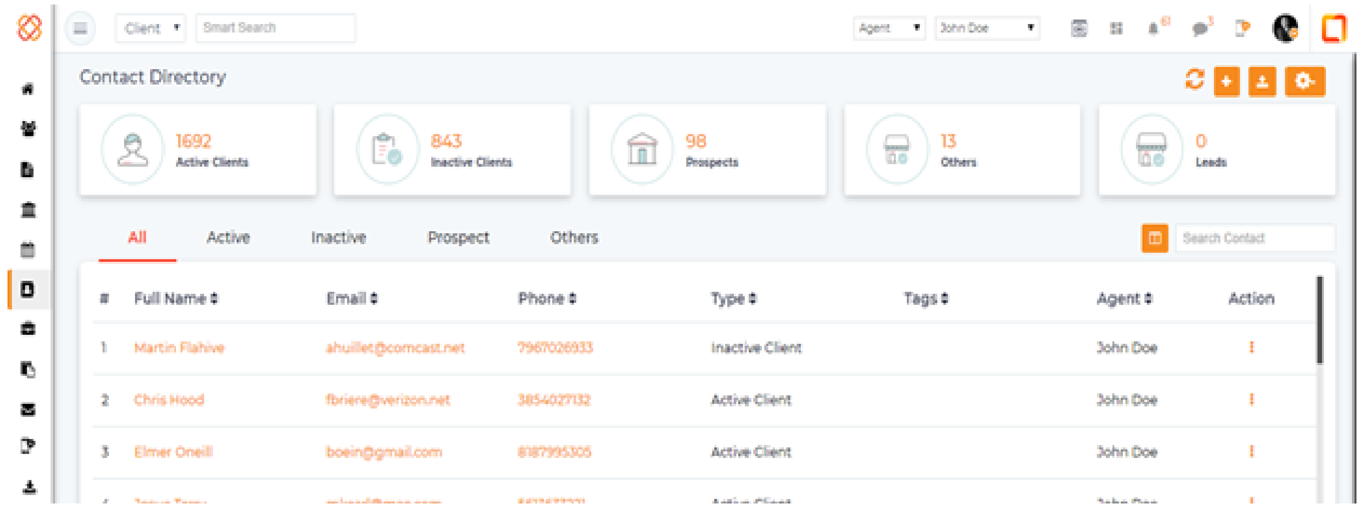
How to use?

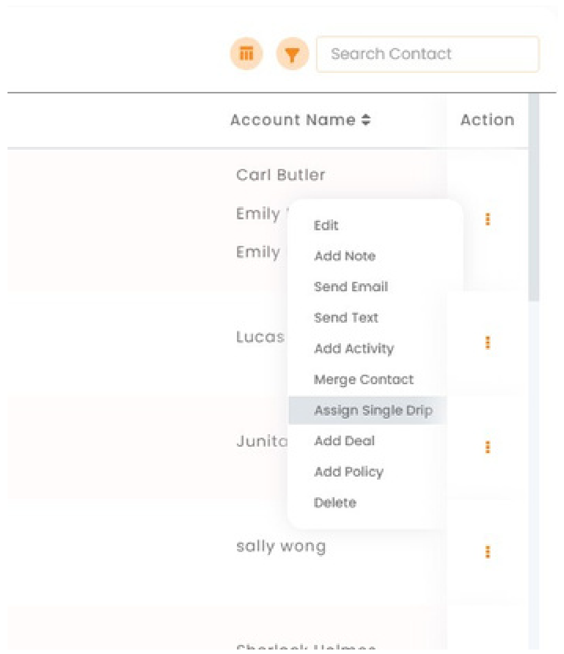
1. Navigate to Engagement
2. Click Single Contact Drip
3. Click on Create button to create a workflow.
4. On the left-hand side you can add desired stages, followed by templates, tags to your email.
5. After you are done adding the desired information, click on the Save button.
6. Created Drip will be visible on the Single Contact Drip dashboard

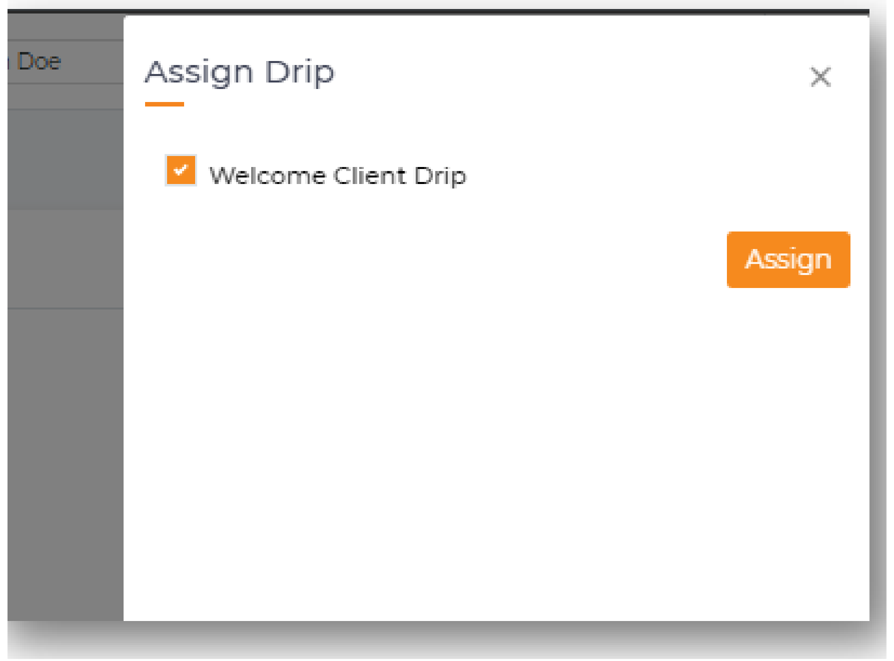


SCD from Contacts

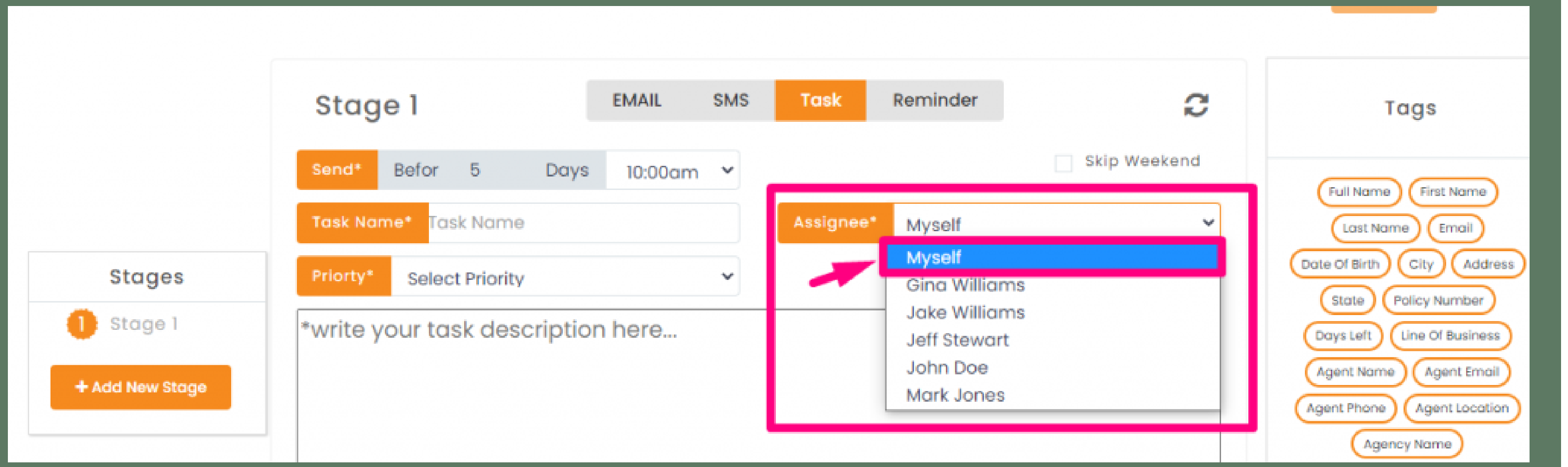
1. Go to Contacts
2. Select the contact you wish to assign the SCD for
3. Hover over the three orange dots for the drop up menu to appear
4. Select Assign Single Drip
5. Select the Drip and click Assign







Click here to learn more:
[SCD from Contacts]



Add Tasks as a Stage

While Creating a Single Contact drip with email and text, you can also **add a Task** in one of the stages to remind you to do an activity.

When you select tasks enter:

Task name

Assigned agents' names

Priority.

Click here to learn more:

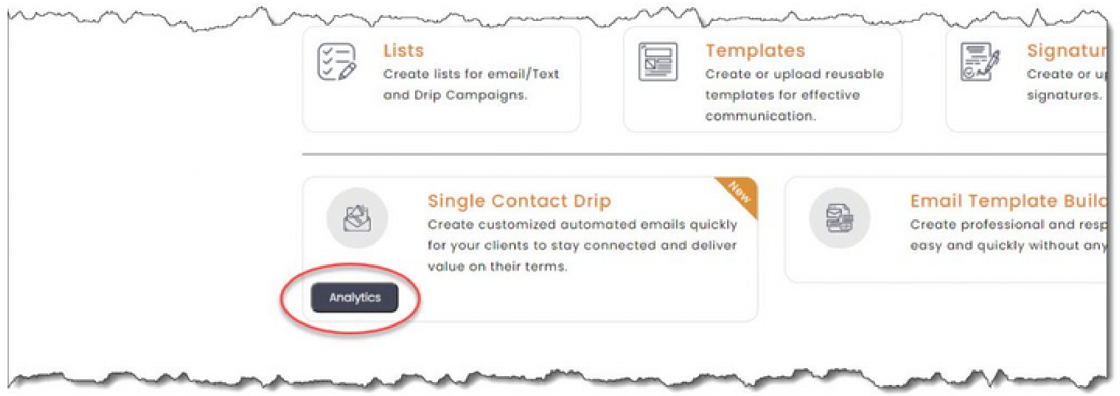
[Single Contact Drip]

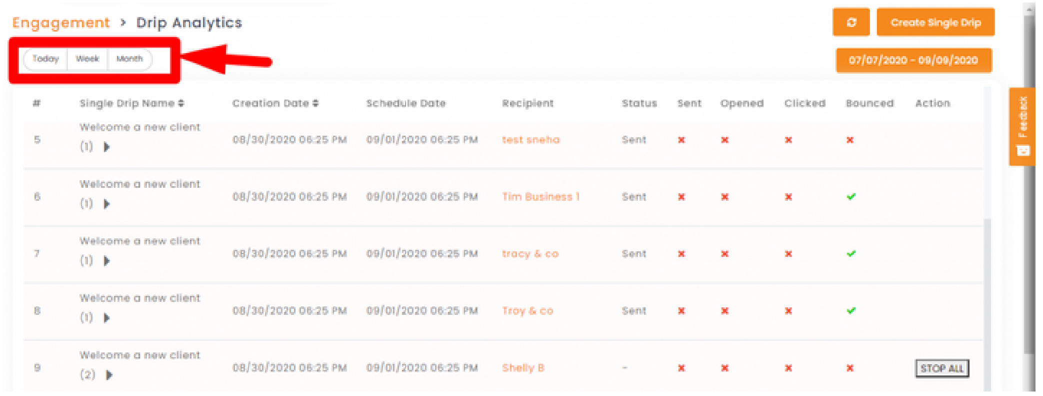
HOW TO USE?

Navigate to Engagement

Click on Analytics in the Single Contact Drip segment

Select from Today /Week / Month at the top left as shown above, for a detailed list of respective data.





SCD ANALYTICS

You can view details of each campaign, its current status, email count and other key indices in Analytics for the current day, week and month.

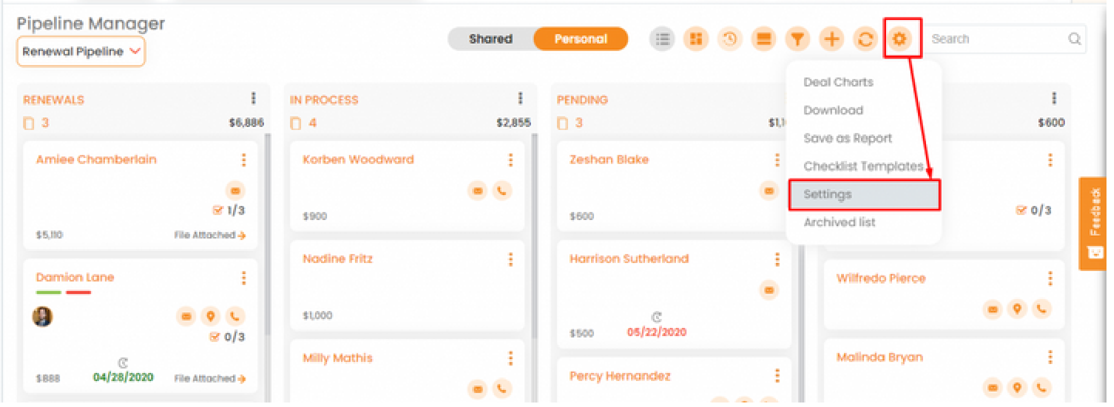
Click here to learn more:

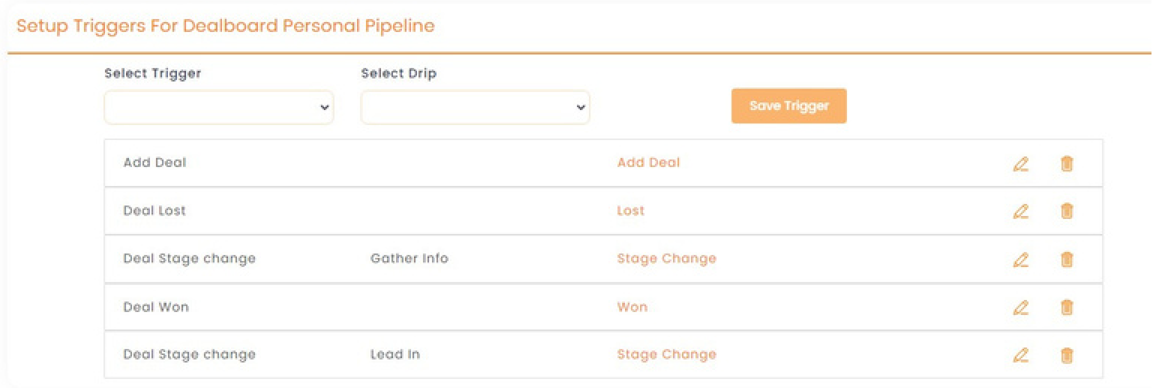
SCD Analytics

Pipeline SCD

SINGLE CONTACT DRIP TRIGGERS ARE SET TO START A CAMPAIGN

1. Go to pipeline manager module, click on the pipeline icon and select the pipeline on which you wish to set triggers.
2. Click on the gear icon and select Settings from the drop-down.
3. On the Settings window, you can see the Set Your Pipeline Triggers segment.
4. Select trigger, stage, and drip
5. Click Save trigger

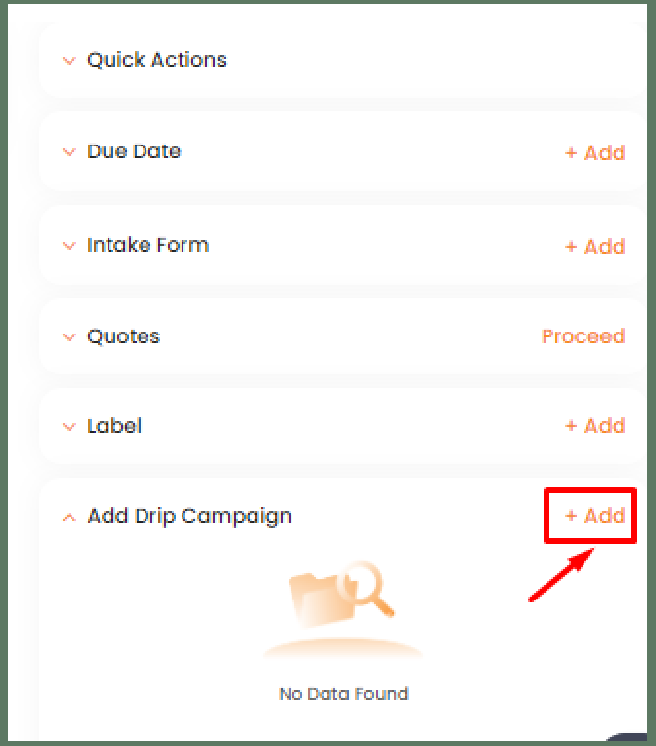




Click here to learn more:
[Pipeline SCD]

SCD Deal Card

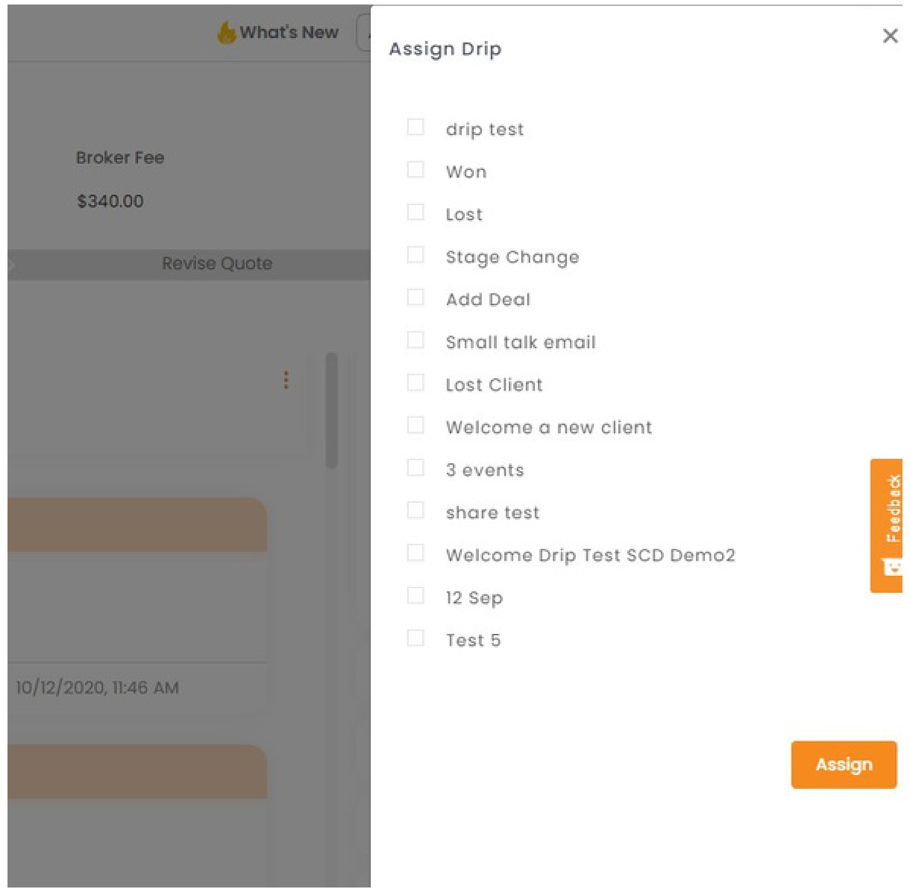
You can assign a drip campaign to particular contact from expanded pipeline card.



Click here to learn more:
[Lead Source]

How to?

1. Navigate to the Pipeline Manager
2. Click on the Deal title for the expanded pipeline card view.
3. Click "+Add" towards the right on the Add drip campaign segment.
4. Mark the campaign name and click Assign on the Assign drip screen.



Lead In Automation

INGLE CONTACT DRIP
RIGGERS ARE SET TO START
CAMPAIGN

STAGES OUTLINE

The sequence is triggered by a deal card that gets placed in Lead In

1 Thank you for your inquiry

2 Introduction

3 Next steps with your insurance

4 Lead - Follow up to no response

5 Subject- Still Interested?

6 Lead - Follow up to no response

7 Why others recommend us

8 This might be a long shot

DAY 1 | DAY 3 | DAY 9 | DAY 14 | DAY 21 | DAY 28

Quote Follow up Automation

STAGES OUTLINE

The sequence is **triggered manually** when the deal card is moved into QUOTE FOLLOW UP

1 — *Did you receive your quote?* — DAY 3

2 — *Lets discuss the key benefits to your proposal* — DAY 4

3 — DAY 5 — *Task - call the client*

4 — *Some useful information for you* — DAY 7

5 — *You have choices! Lets discuss.* — DAY 9

6 — DAY 10 — *Task - call the client*

7 — *Your quote is waiting for the green light* — DAY 14

THANK YOU!

To learn more please visit:
Knowledge base
Email: support@insuredmine.com
CALL: +14696161821

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