

WITH AMANDA RICHARDS
THURSDAY OCTOBER 22, 2020

Daily Bite Size Training

Topic: Welcome, Birthday, and Client
Automation

Topics/questions from zoom call

Question: When sending a Birthday Automation can I include prospects?

Answer: Yes, with Birthday Automation you can include all, active, inactive, and prospects.

Question: How do I send a 65 Birthday Automation a year early?

Answer: Select When and click Before then in the Days field type 365 days.



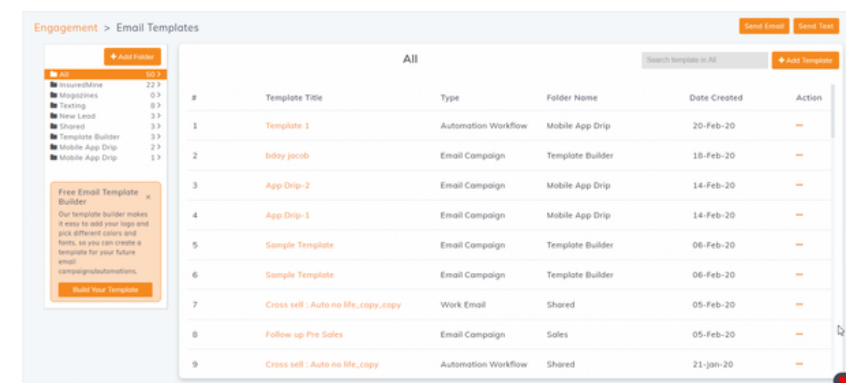
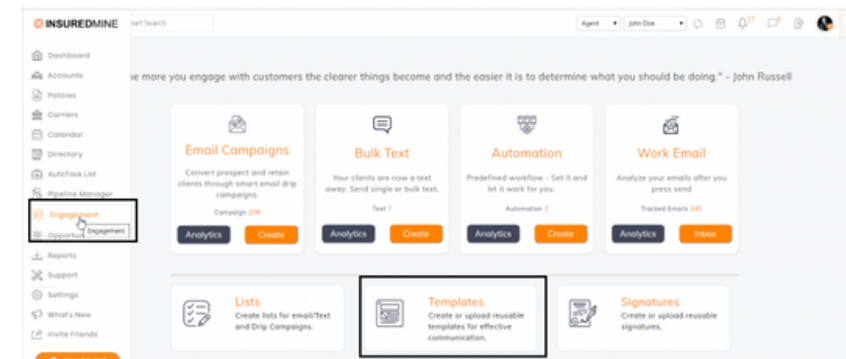
Automation

Automation

Templates

Design effective email campaigns to communicate with your customers and prospects.

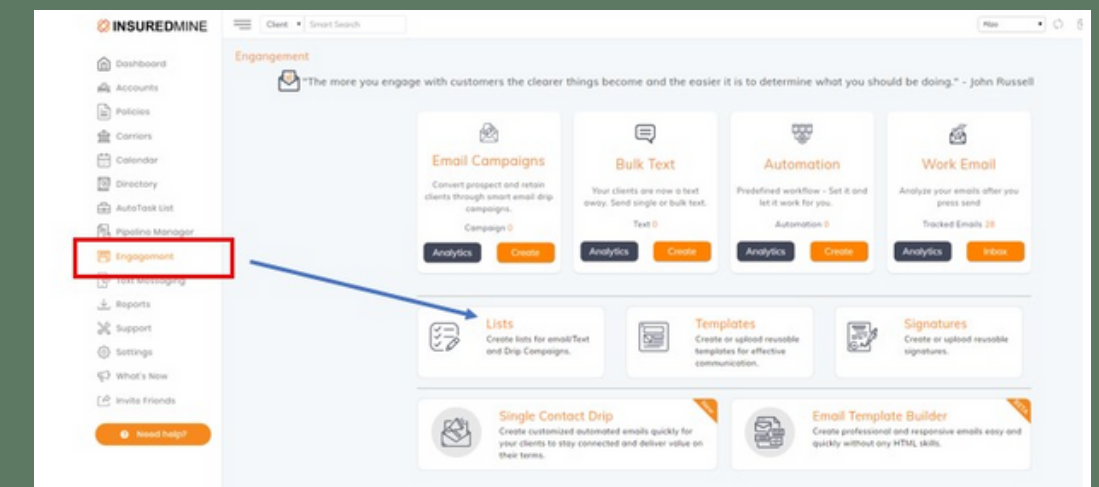
- To create a template – click on Engagement, select template, select template from desired folder
- Here you can edit, update, delete, or add any new template.



Lists

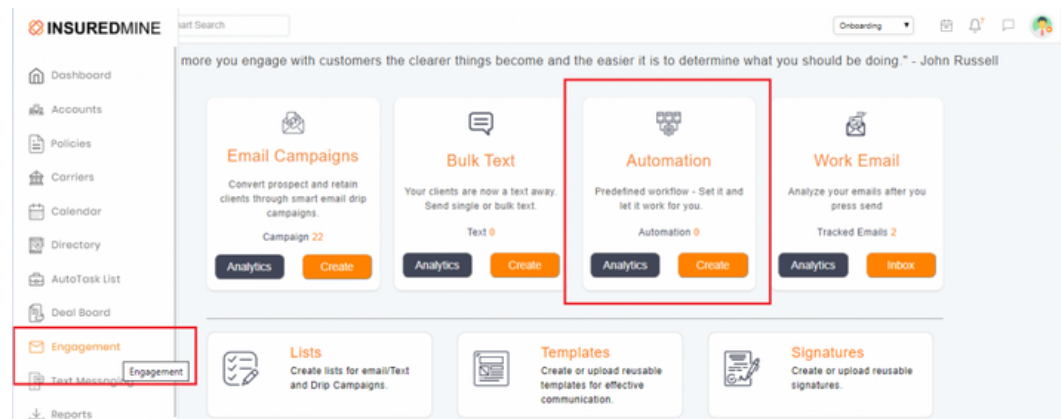
List are one of the **most important** features of running an effective campaign.

To create a list – click on Engagement from the left navigation bar and then select the list box as highlighted

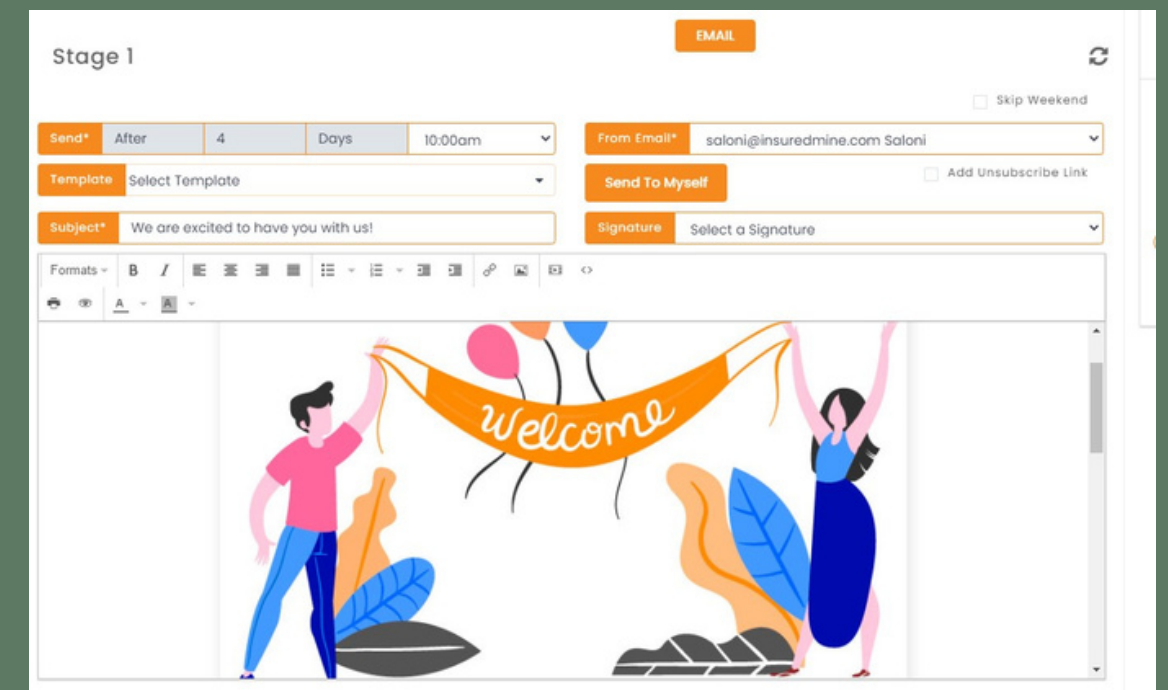


Welcome Automation

1. Go to the Engagement section from the left navigation bar and click Create under the Automation tab.
2. Navigate to Welcome Clients and click Get Started
3. Fill out Workflow and click begin
4. Fill out necessary fields
5. Create Stages (optional)

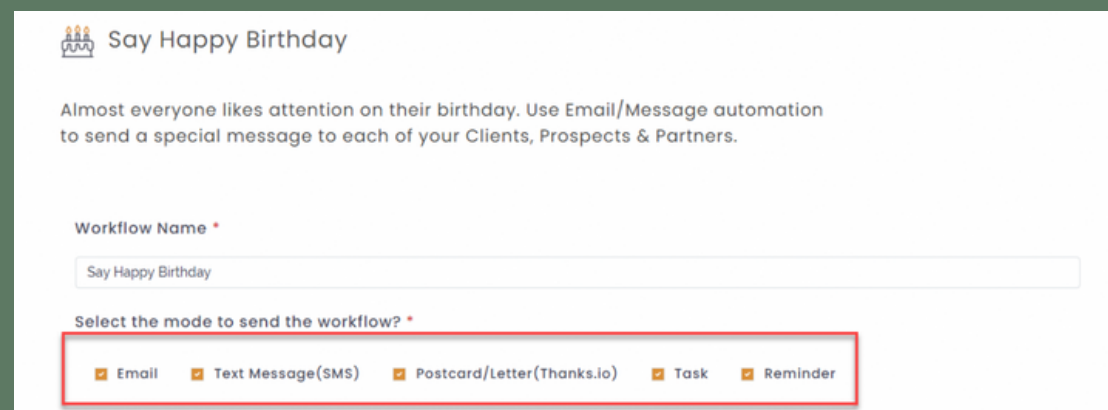


Never miss out on an opportunity to celebrate your customers!



Happy Birthday Automation

Who doesn't enjoy a happy birthday email?



Say Happy Birthday

Almost everyone likes attention on their birthday. Use Email/Message automation to send a special message to each of your Clients, Prospects & Partners.

Workflow Name *

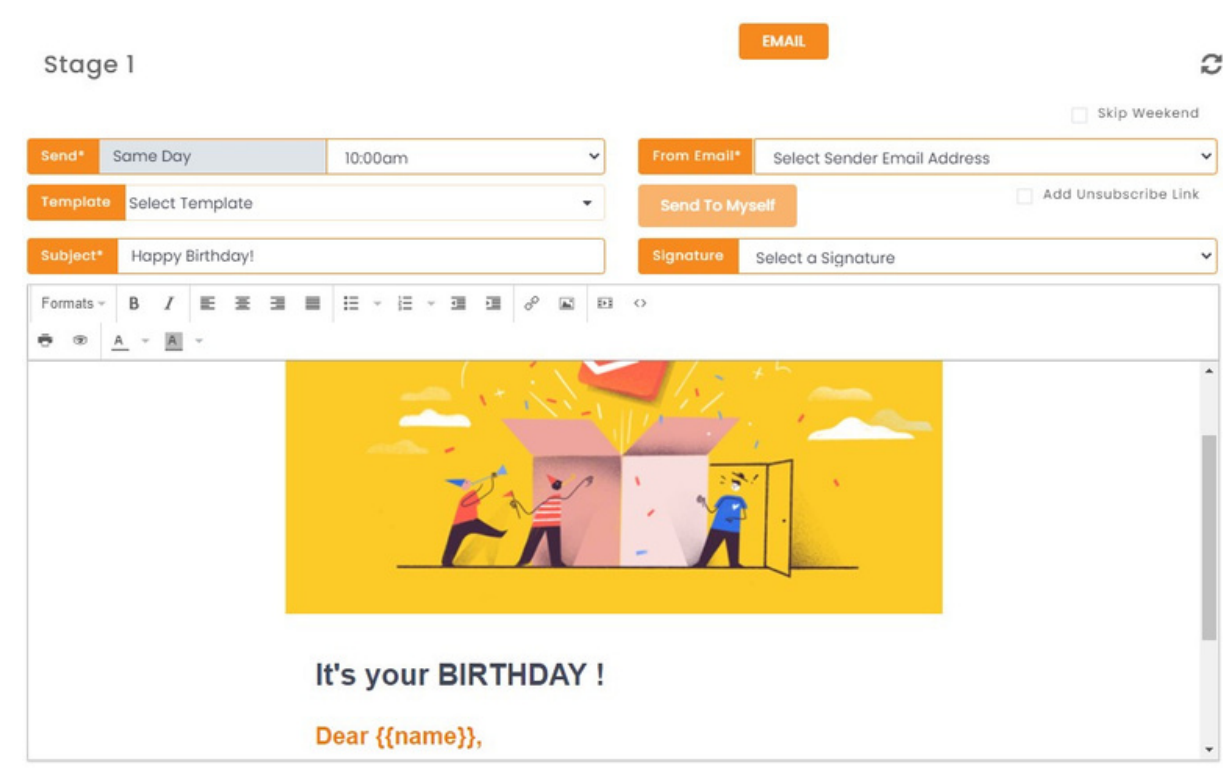
Say Happy Birthday

Select the mode to send the workflow? *

Email Text Message(SMS) Postcard/Letter(Thanks.io) Task Reminder

How to create Birthday Automation?

1. Go to the dashboard of Agency Portal and click on Engagement.
2. Under the Engagement Module, select Automation and click Create.
3. Navigate to Birthday and click Get Started



Stage 1 EMAIL

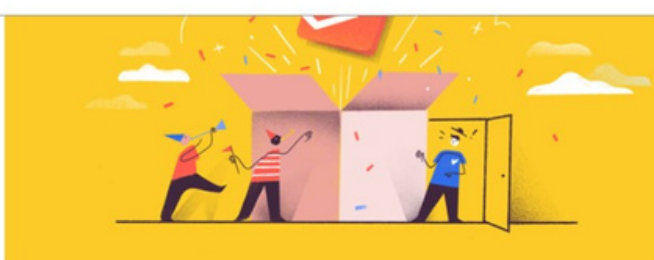
Skip Weekend

Send* Same Day 10:00am From Email* Select Sender Email Address

Template Select Template Send To Myself Add Unsubscribe Link

Subject* Happy Birthday! Signature Select a Signature

Formats - B / [Rich Text Editor Icons]



It's your BIRTHDAY !

Dear {{name}},

Client Pulse Automation

Google business reviews are important to build your brand image and online brand visibility.

- Send automated emails, text messages to your clients requesting for feedback through Google Reviews
- Send real postcards & letters
- Create a drip email notification for tasks
- Send reminder email notification

Client Pulse

Grow your business with more reviews

Workflow Name *
Client Pulse

Select the mode to send the workflow? *

Email Text Message(SMS) Postcard/Letter(Thanks.io) Task Reminder

Select a list *
Active Client

Trigger workflow when the following conditions are met: * Total recipients till now: 2610

when *
After

days *
20

Note: Automation email/messages for Client Pulse workflow automation will be triggered 20 days after for the "Active Client" list. 3 days before, Agent will get users list notification email.

Stage 1

EMAIL

Send* After 4 Days 10:00am

From Email* saloni@insuredmine.com Saloni

Template Select Template

Send To Myself

Subject* How did we do?

Signature Select a Signature

Formats - B I U Link Image

How did we do ?

Hi {{firstname}},

Thank you for your business. We have a favor to ask you. We value your feedback as we continue to improve our support & service. Please let us know what your experience was like working with our team!

Take Pulse

THANK YOU!

To learn more please visit:

[Knowledge base](#)

Email: support@insuredmine.com

CALL: +14696161821

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