Springboard to Success

Activities Book – Speed to the Lead

*According to the 2021 FranConnect Sales Index report, 85.7% of all leads closed were those that were **contacted in the first 4 hours of their expressing interest**. Yet 75.4% of franchisors fail to reach that goal, and **nearly 70% of leads never receive a callback**.*

This book gives you the steps to take action to improve your response time to leads, enhancing your chances to close franchise deals.

We invite you to use these instructions, to submit questions to training@franconnect.com, and if you're really really stuck, we invite you to schedule a 1:1 session with us to help you through these processes. You can schedule that time using this link: https://tinyurl.com/677y7tz8.

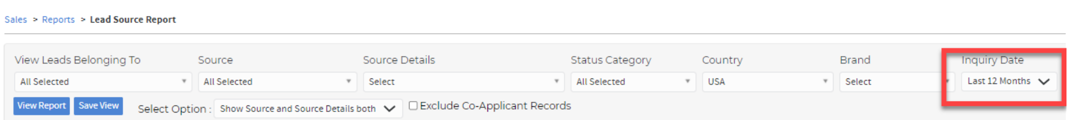
Contents

Consolidating Data Sources

Having well-defined data sources lets you personalize responses and triage leads as they enter the system, and allows you to analyze the cost-per-lead and cost-per deal later, to allow you to fine-tune your lead source mix.

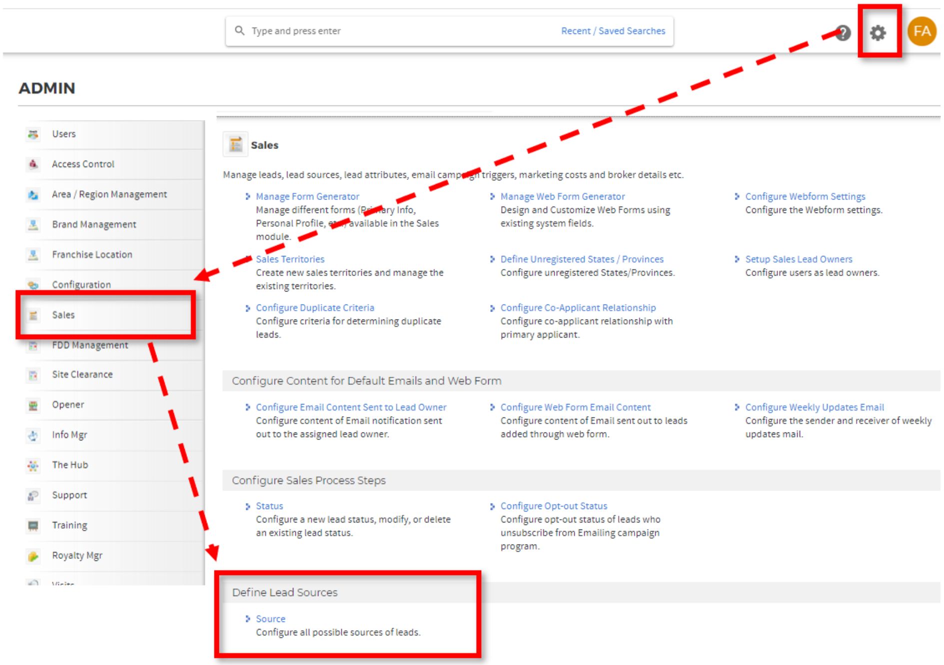
You may have some older lead sources, or sources that should be consolidated – or broken out – in order to give you a good picture of the actions to take. Here's how to get your lead source list in shape:

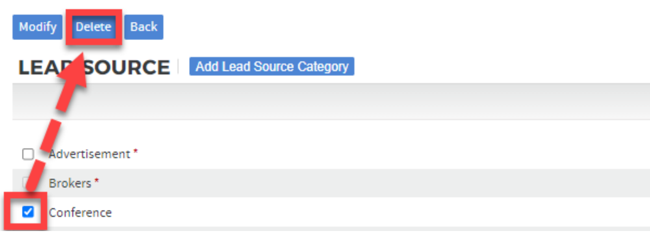
1. Run "Lead Source Report" with Inquiry Date=Last Year



If a Source in your source list is not on this report, you probably can delete it from your list.

To Delete: **Admin>Sales>Lead Source>Delete** any Category not being used or go into Lead Source Details for each Category and Delete Source Details not being used.





Thebiggest culprit in bad sources is Lead Source Category=Internet, Lead Source Detail=Other due, since it is often the default for email parsing leads. This can be corrected by making sure the Parsing Email Subject is accurate or asking the lead source to parse in the Category and Details in their email using keywords.

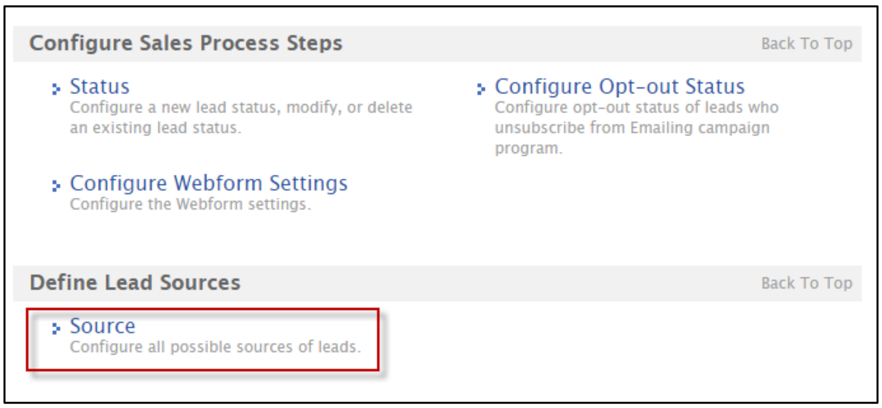
There are a variety of organizations to assist your Franchise in finding qualified sales leads. When you elect to use one of these companies, FranConnect can automatically add the lead into Sales (through Email Parsing) reflecting the correct internet source.

Most Franchise lead generation companies are familiar with the way FranConnect maps leads from their notification email to your FranConnect system so communicating your need to them should not be difficult.

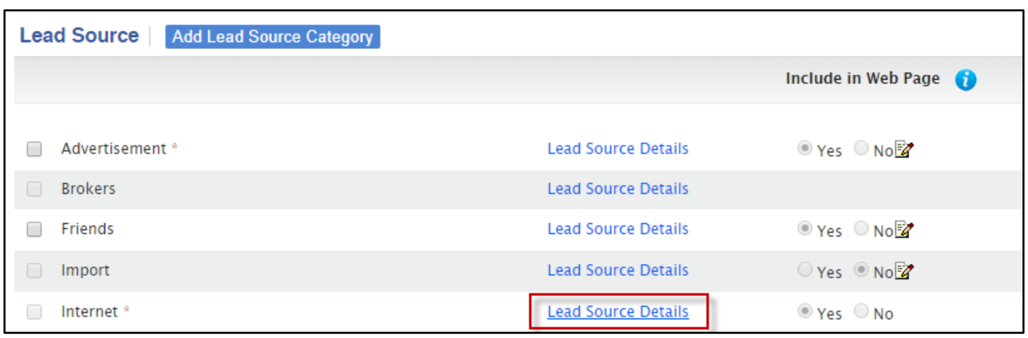
When you onboard a new lead generation company you will provide them with your specific FranConnect email, likely given to you by your Implementation Manager (you can also contact helpdesk@franconnect.com for your FranConnect email). The lead generation company will add this email in the CC or BCC field of the lead emails they send to you. Once FranConnect receives the email it will map the lead details to your FranConnect system and identify the source. For leads to map correctly by source you will want to make sure the lead generation company is listed in the Source page in Admin under Sales. You will also want to be sure the Subject line of their email is correctly reflected in the Email Parsing text box.

To add Internet Sources

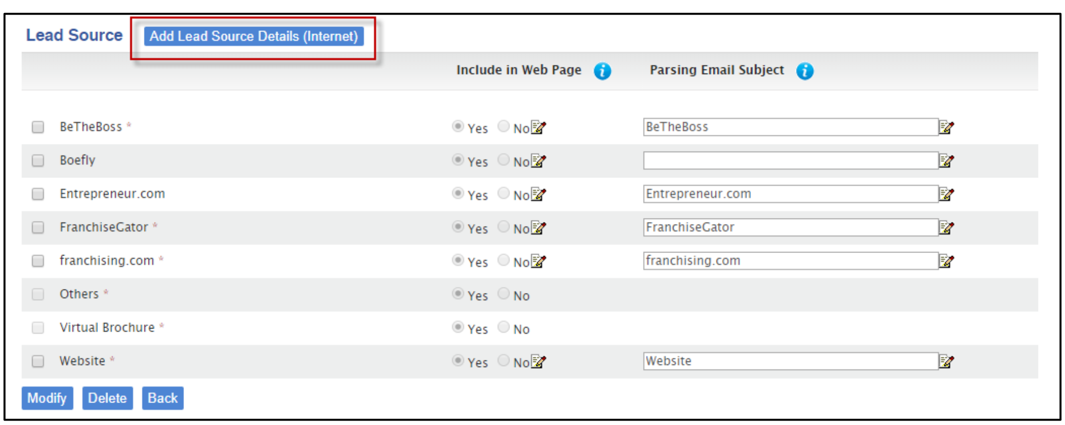
1. From the Sales section of Admin, select **Source.**



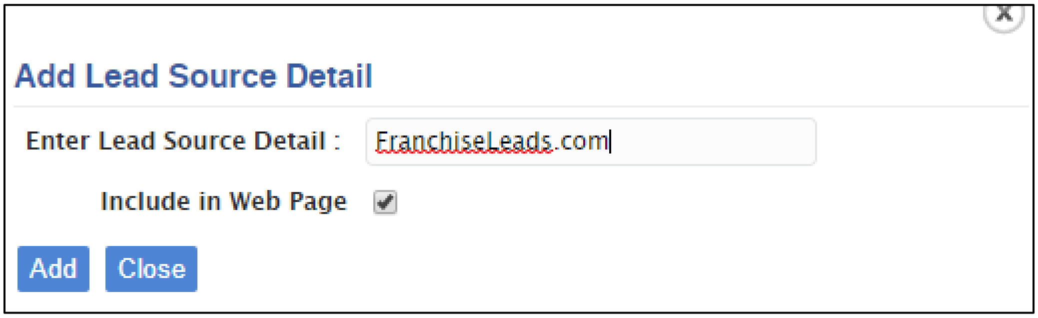
2. Click **Lead Source Details** beside Internet.



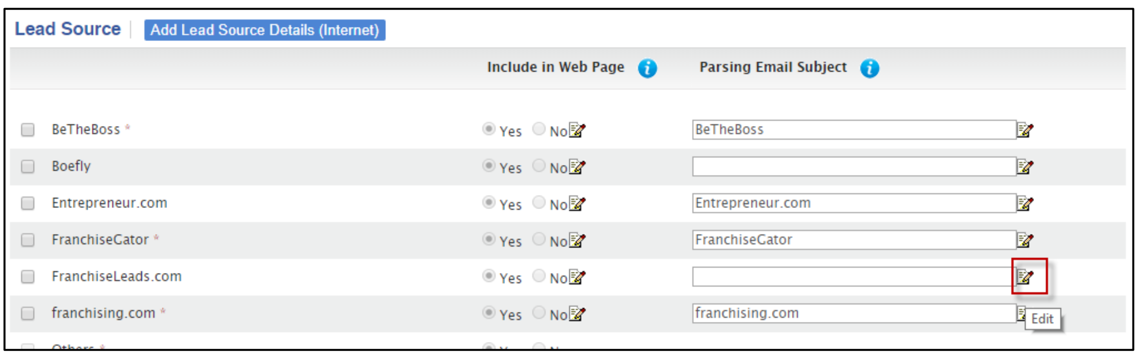
3. Click **Add Lead Source Details** to add the new lead generation company.



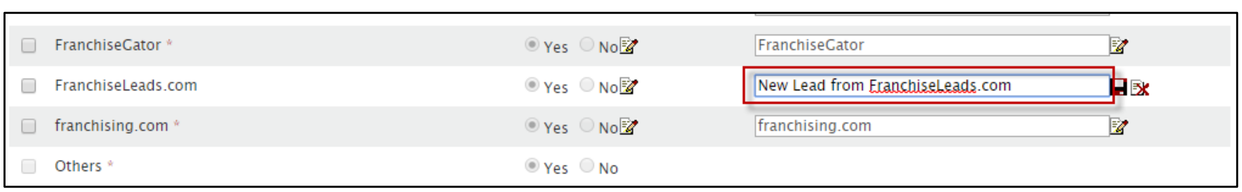
4. Input the source (e.g. Franchiseleads.com) and select the box to Include this source in your web form (if using FranConnect's Lead Inquiry form).



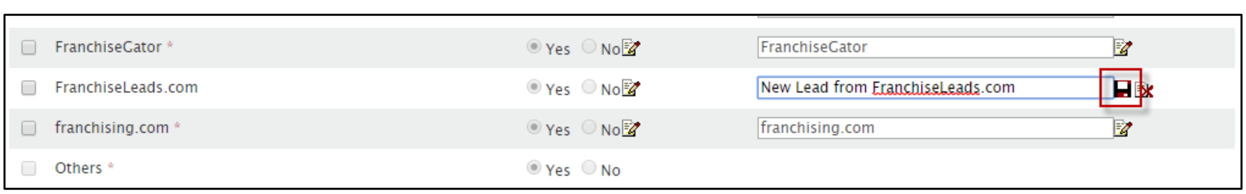
5. Click **Add**.
6. When you've added the source you will want to make sure the Parsing Email Subject text box matches the subject line of the emails you receive from the lead generation company (e.g. New Lead from FranchiseLeads.com). Click the edit icon to the right of the Parsing Email Subject line.



7. Input the email subject line from the lead generation company as it appears in your inbox.



8. Click **Save**.



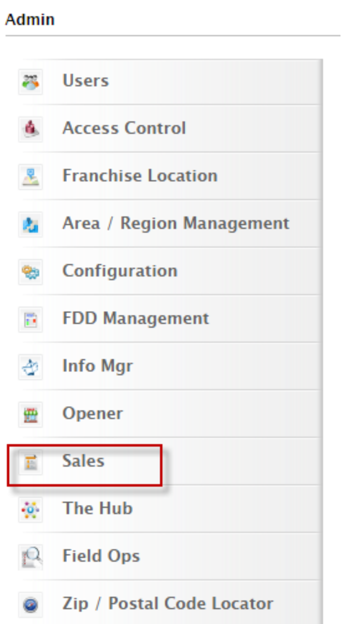
Once you've added the Source and Parsing Email subject, future emails from the lead generation company will map directly to your FranConnect system without manual entry.

Cleaning Up Duplicate Leads

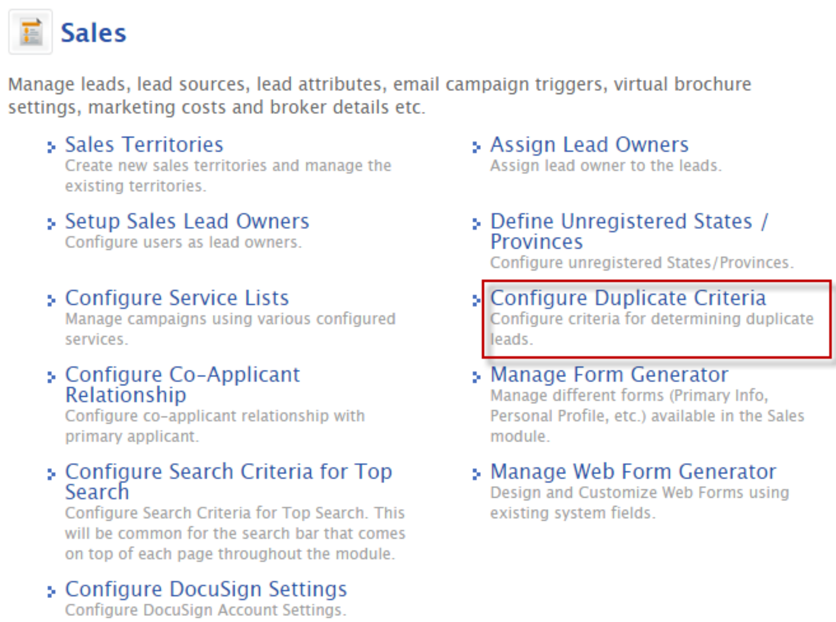
Determining Duplicate Criteria

Duplicate leads can be confusing and difficult to identify when you have many leads. You can use the FranConnect Sales to set criteria and determine duplicate leads. To do this:

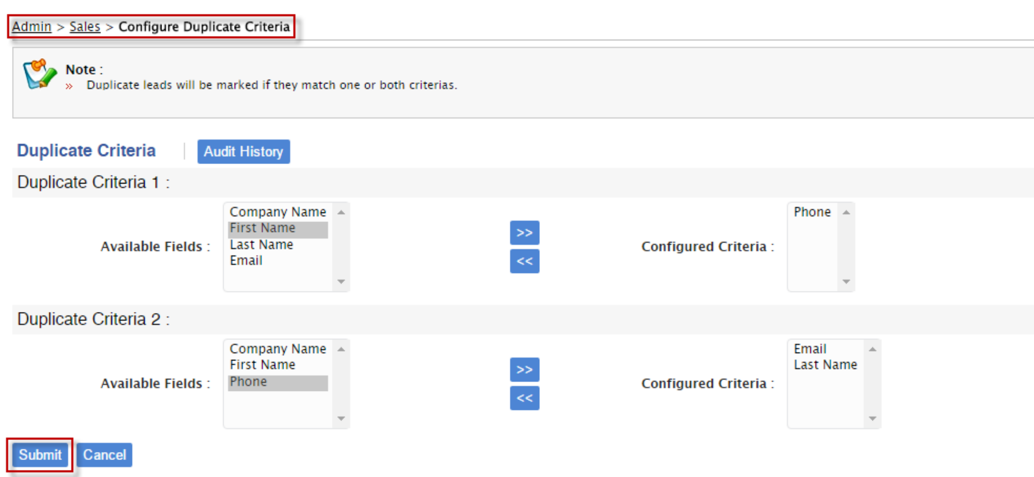
1. From the Admin page, select **Sales** from the Navigation Panel.



2. Select **Configure Duplicate Criteria**.



3. To define the criteria for finding duplicate leads:

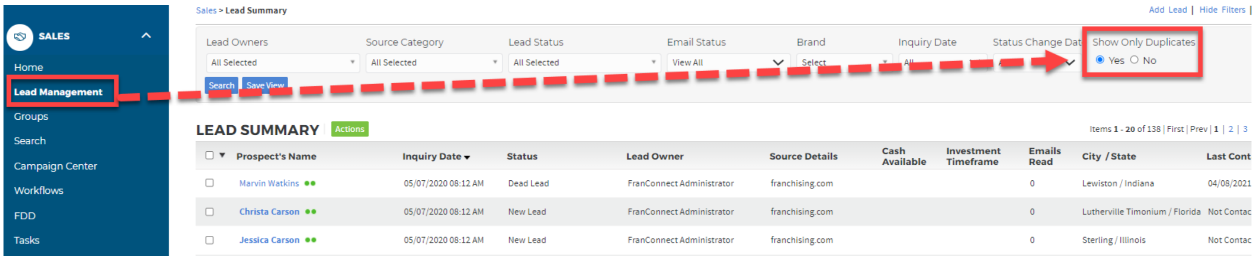


a. Pick the field name you want to use for identifying. You can select first name, last name, email, company name, and phone number. Use the operators (>> and <<) to move field names and configure the criteria.

4. Click **Submit**.

Finding Duplicate Leads in Lead Management

To see a list of leads that are suspected duplicates, go to the Lead Management page of the Sales module, and choose to filter showing duplicate leads only.



Duplicate leads are identified by two green dots following the Prospect's Name on the record. To see the suspected duplicates near each other, click the header of the Prospect's Name column to sort by name.

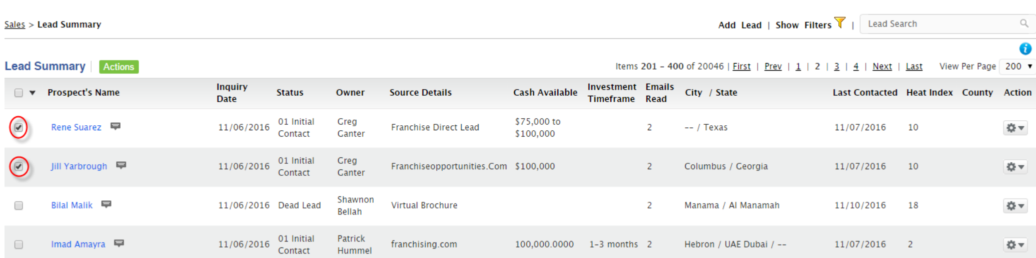
You can choose to simply delete the subsequent leads from the list by checking the box next to the names to be deleted, choosing the green Actions button, and choosing "Delete" from the menu. However, you may not know what information is on each version of the duplicate, so it's usually wiser to merge the leads into a single record, choosing the correct information to overwrite the consolidated record.

Merging Leads

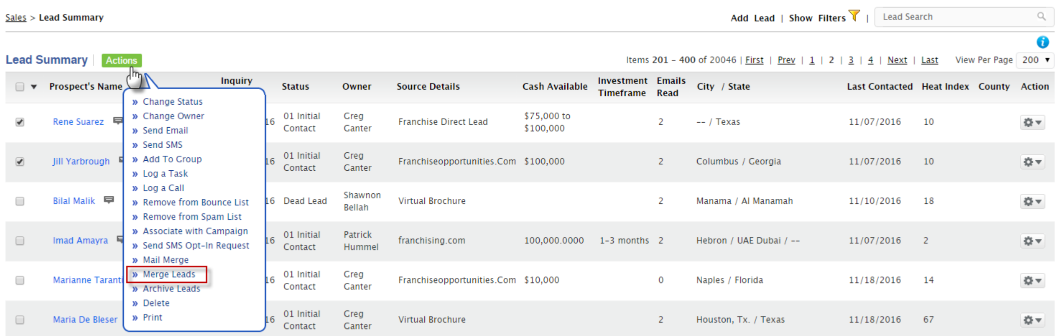
You can merge the two leads, and choose the fields you want to merge. Note, if your lead appears more than twice, you'll need to merge the records two at a time until you're down to a single record. To merge leads:

1) From the **Sales** module, select **Lead Management.**

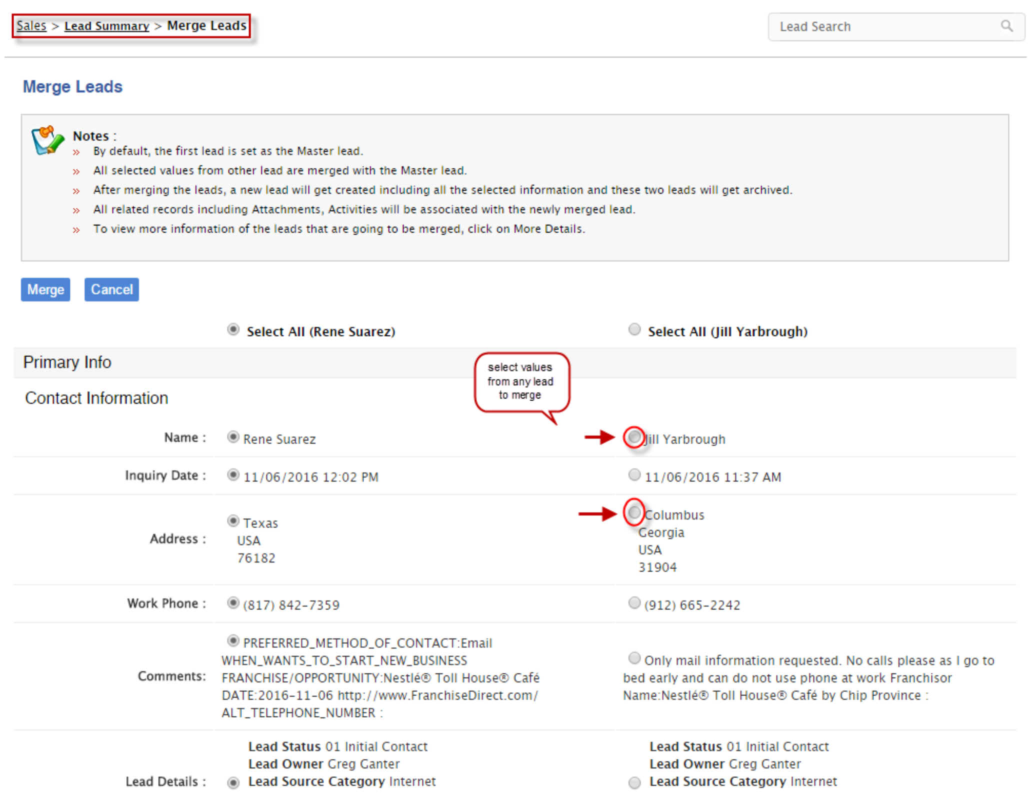
2) Select the checkbox corresponding to the leads you want to merge.



3) Click the **Actions** button drop-down and select **Merge Leads**.

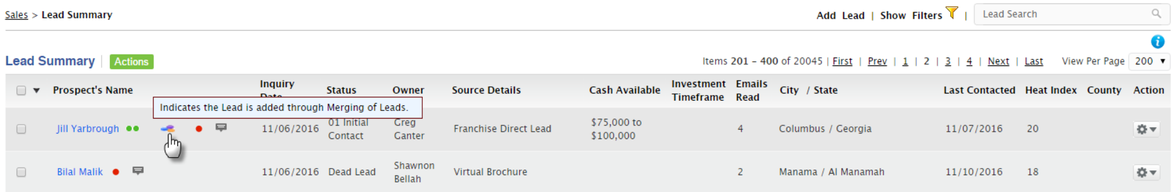


4) Select the desired lead information to merge. The merged information will be displayed as a new lead in the FranConnect system.



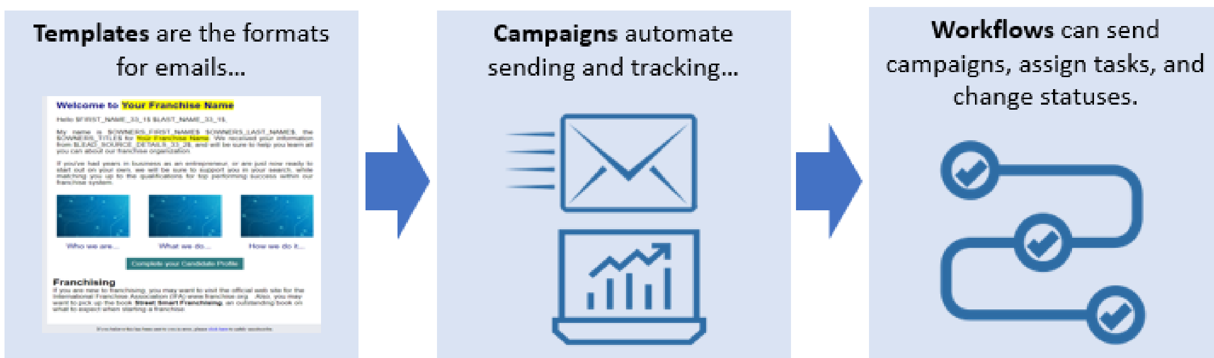
5) Click **Merge** after selecting the fields you want to merge.

6) You can also view the new lead on the Lead Summary page. You will notice an icon next to the Prospect's name to indicate the new lead.


Sales > Lead Summary
Add Lead | Show Filters |
Lead Search
Lead Summary
Actions
Items 201 - 400 of 20045 | First | Prev | 1 | 2 | 3 | 4 | Next | Last
View Per Page 200
Prospect's Name
Inquiry Date
Status
Owner
Source Details
Cash Available
Investment Timeframe
Emails Read
City / State
Last Contacted
Heat Index
County
Action
Indicates the Lead is added through Merging of Leads.
Jill Yarbrough
11/06/2016
01 Initial Contact
Greg Canter
Franchise Direct Lead
$75,000 to $100,000
4
Columbus / Georgia
11/07/2016
20
Bilal Malik
11/06/2016
Dead Lead
Shawnon Bellah
Virtual Brochure
2
Manama / Al Manamah
11/10/2016
18

Automating Lead Responses

Tasks that you do over and over can be automated, using tools in FranConnect. The three tools most frequently used are templates, campaigns, and workflows.



Templates are the foundation for campaigns but can also be used to standardize single emails you send to leads. For example, if every lead receives the same email from you at an undefined time during the sales process, you may create a template without assigning the template to a campaign. In this case the template is available for use whenever appropriate as a standardized email that goes out to the lead. The easiest way to create a template is to edit one that FranConnect has already provided.

Campaigns are groups of email templates, arranged to be sent in a defined order. They can be used for marketing purposes (“Here is why you should buy our Franchise”, informational purposes (“Here are details about this event”) or to gather lead data (“Filling out the application is the next step in the process, click here to fill out the application”).

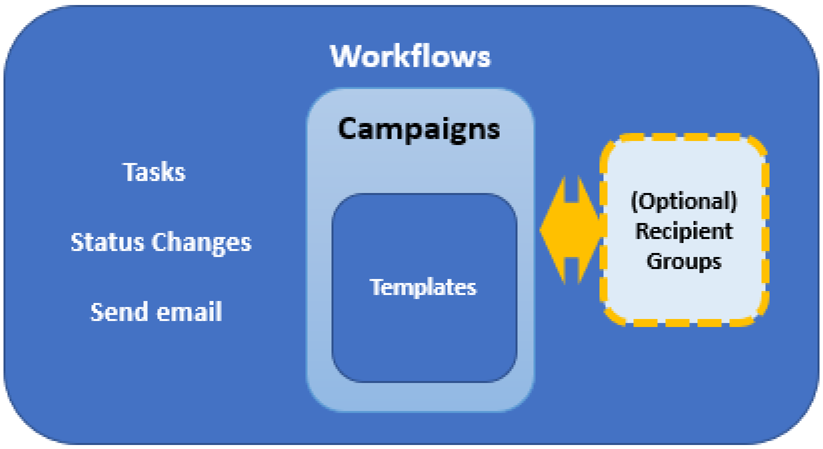
To automate the delivery of a campaign you create a **workflow**. Workflows allow you to create system guidelines for when campaigns are sent, tasks are created, and statuses are changed automatically.

Any of these elements can be used independently – you can make an email template that you send without a campaign,

Overview - Setting Up Automated Workflows

Workflows may contain campaigns, which may in turn contain templates and groups to which the campaign will go.

Relationship of automation components



Both workflows and recipient groups require campaigns to already exist. Campaigns can use pre-existing templates, or you can build the templates inside the campaign-building interface. Two potential orders for building these are:

Templates > Campaigns > (Recipient Groups) > Workflow

OR

Campaigns (building templates inside) > (Recipient Groups) > Workflow

Let's see how each component contributes to the automation process.

About Templates

Templates let you design email communications that show off your brand, and are personalized to the recipients.

You can choose from pre-built layouts and customize with your own artwork, or you can build your own templates from scratch or using HTML code that you already have. For tips on using existing HTML code in FranConnect templates, please see the page http://portland.franconnect.net/help/emaildesignguidelines/

You can customize the content in your emails to include greetings by name, and important information from the recipient's record in FranConnnect, such as the expiration date of an insurance policy. To do this, you use keywords – placeholders for the information. For more about keywords, see “About Keywords” in the Step by Step guide for the module you’re using – Sales, Information Manager, or CRM.

Best Practices for email templates

When designing email templates, keep in mind that you're sending to a wide variety of recipients, and you want your message to get into the most inboxes possible (not to be trapped by spam filters), and to look good to the most people when it gets there, so that they can and will read it. Once they have read it, you want to point them smoothly to the action you want them to perform.

Template Contents and Design

Grab Them in the Subject Line: Pay special attention to the subject line of your email, since that may be all of it that your contacts see at first. Customize the subject line to be relevant to your call to action, and have a personal connection to the contact. Use the keyword in your subject line if possible to make to personalize your appeal.This will help to improve the delivery rate of your campaign and reduce the rate at which it gets trapped in spam filters.

Keep it compact: many emails come back undeliverable due to size restrictions by the recipients' servers. To maximize successful delivery, try to keep the whole email size (including attachment, if any) within 5 MB. Ideally, Email contents for email marketing should be less than 1 MB.

Image-to-Text ratio: A 60/40 text to image ratio should be maintained for best results. Recipients are less engaged with long, text-heavy emails, and lots of text can prevent them from easily seeing and heeding your call to action. Image file sizes need to be considered because a mobile device will not load images as fast as a desktop or laptop. Large images in your template and large attachments will impact the email's size, and therefore the delivery success rate of your campaign. Try to keep the size of each image at 20k or less. Do not use Flash or gif animations - they won't work and just add to the overall file size of the email.

Recommended image sizes for email templates:

- Banner image width - 600px
- Image size for one column - 574px
- Image size for two column - 274px
- Image size for three column - 174px
- Recommended file size - below 1mb (not more than 5mb)
- Recommended file resolution - 72 PPI
- Color mode - RGB
- File Type - JPG, PNG

Optimize your calls-to-action (CTAs) - In the email content, there should be very specific and limited "Call to Action" links or buttons. Emails containing more links are often marked as spam based on recipient server spam filter settings.

Keywords: using keywords can give your email a personal touch, but for large campaigns they can also slow down the delivery rate of emails. Use fewer keywords based on email content ratio, and your campaigns will be sent at a faster rate.

Alt tag usage - Alt tags are snippets of text related to an individual image that are commonly used in email so that before an image loads, the user has an idea of what the image is, what the offer might be, or the overall theme of the email. You can define alt text in the template using the editor.

Save time and reinforce your branding by re-using Existing Templates - Select an existing template and use 'Copy and Customize' to create a new template. *Don't forget to change the subject line and make sure to update the email subject to make it more personalized*

About Campaigns

Campaigns are typically groups of emails that are sent out to recipients who meet specific criteria. Those criteria could be met individually, like being added to the system or having a status change, or as a group, for example all people whose insurance expires in the same month, or people assigned to a Recipient Group.

Sales module campaigns go out to potential franchisee candidates. CRM module campaigns go to potential leads of your franchisees. When setting up a CRM campaign, you can set up the campaign to apply to ALL locations (a Master Campaign), or assign it to apply to selected franchises.

In addition, you can choose to set up a CRM campaign as a "drip" campaign, which means that you can define multiple emails to be sent at intervals you define, all as part of the same campaign.

Information Manager campaigns go to franchisees.

When should I use campaigns vs. emails in a workflow?

Campaigns can be tracked, which often makes it worth setting up a campaign and a template even when you have only one email to send. A good rule of thumb is to use campaigns for external emails, and embed emails directly into a workflow only for internal emails, such as reminders or information emails to corporate staff.

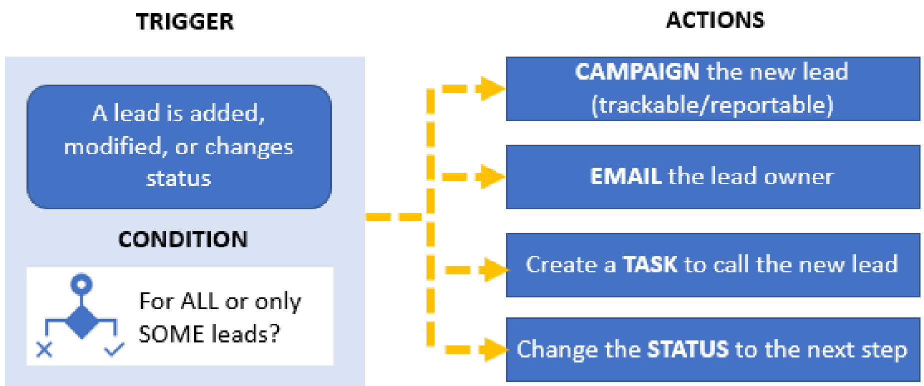
About Recipient Groups

Groups are mailing lists of recipients who match a set of criteria you define based on fields in their profiles. You can build a static group by defining the group once and associating leads, or you can build an automated (Smart) group, which will add new recipients into the group as they enter the system.

Groups can only be associated with one status-based campaign at a time. They can be associated with multiple promotion-based campaigns.

About Workflows

Workflows set up actions that can be kicked off automatically, based on another (triggering) action that takes place in FranConnect. You can choose for an action to happen for all leads or locations, or you can have it happen to only seom locations, based on conditions. The illustration below shows an example of what might be automated for a new lead coming into the system.



The **trigger** is the event that kicks off the workflow actions. You can trigger a workflow in different cases, depending on which module you're working in. The chart below shows what triggers can be used in each module that has workflow capability.

Sales	Information Manager	CRM
Record is added/modified	Record is added/modified	Record is added/modified
	Based on date associated with record	Based on date associated with record

Events:	Events:	Events:
Lead signs FDD Lead fills out a specified web form First activity logged Specified campaign is sent to a lead Call is logged Email sent to lead Lead status changed When specified candidate portal activity is logged	Location signs FDD Location fills out specified web form First activity logged Specified campaign is sent Call is logged Email is sent Data update request approved/rejected Location transferred/terminated Last contacted date is past N days Last visit date is past N days Visit scheduled/completed Customer complaint is logged	Existing contact fills out a specified web form Transaction is created Opportunity is created First activity logged Status changed

What's the difference between a status-driven campaign and a workflow based on a status change?

*In a workflow, the status change is an **event**, meaning that the initiation of that status kicks off the workflow. A campaign will continue to progress as long as the lead stays in that status, and will stop when that lead moves out of the status, even if the status is not complete.*

Conditions let you target specific leads or locations to have the action performed. For example, not ALL killed leads would warrant a follow-up campaign, but it might be desirable to send a 90-day follow-up email to leads who were killed for non-response, or who indicated that they were deferring their decision. The chart below shows what conditions can be used in each module that has workflow capability.

<table>
<tr><th>Sales</th><th>Information Manager</th><th>CRM</th></tr>
<tr><td></td><td>Franchisee Type: one or more
Corporate
Active
In Development</td><td>Leads vs. Contacts</td></tr>
<tr><td colspan="3">You can make conditions based on values for one or more fields in the record, including fields that you add.</td></tr>
</table>

Actions are the instructions you give for what happens when the conditions are met. The same workflow can kick off several actions, for example sending an email to a lead and adding a task to the lead owner to follow up with a call. The chart below shows what actions can be used in each module that has workflow capability.

Sales	Information Manager	CRM
Send email campaign Change status Send email Create task Change candidate portal status	Send Email Send Campaign Create Task	Send email campaign Change status Send email Create task

Create task: You can create a task, designate a task type and a priority, and assign it to the lead owner by role, or to one or more people explicitly from a list. You can schedule that task to happen immediately, after an interval, or have no due date (a "timeless" task).

Change status or candidate portal status: You can advance a lead along the sales pipeline by assigning a new status from the list.

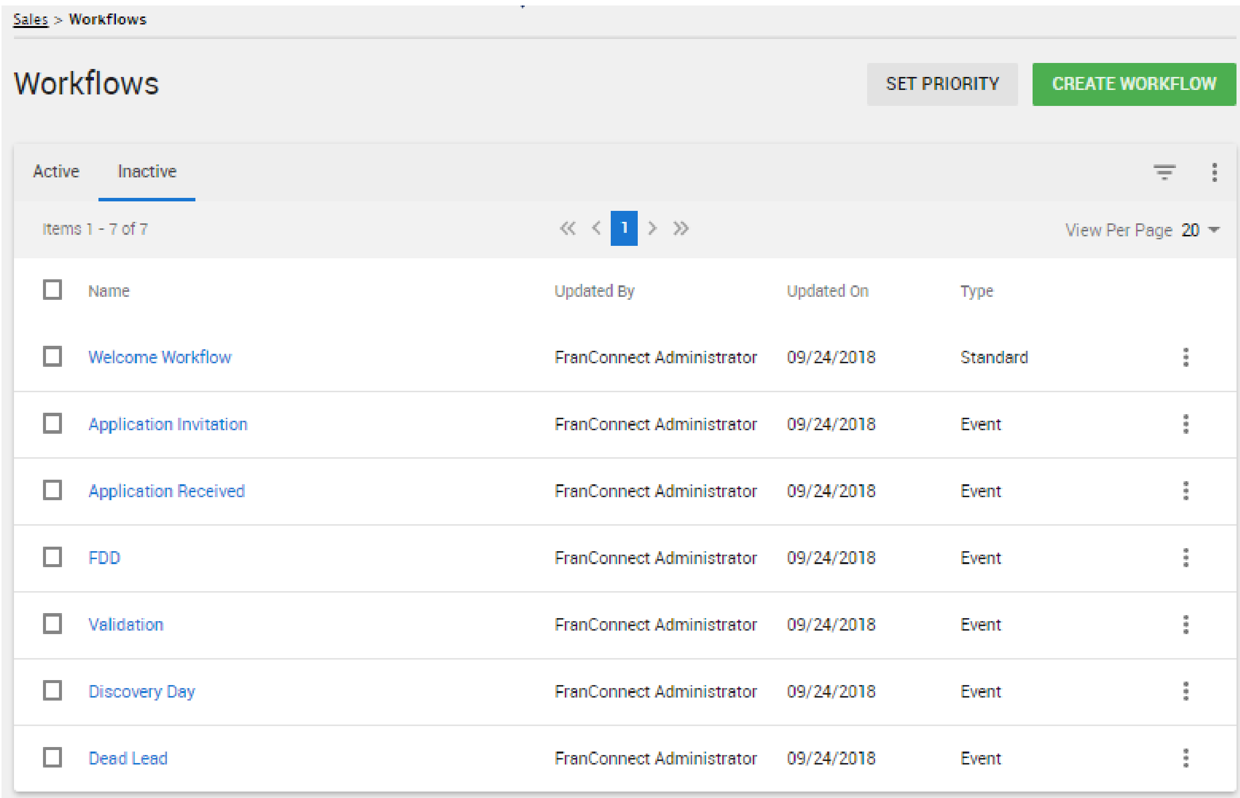
Send email: You can send an email to anyone you designate. Note: typically, this is used for internal emails only, because no tracking statistics apply to an email created in the workflow directly.

Send email campaign: You can set up one email or a series of emails to be sent to recipients you designate. You can also report on the results of the emails, making this a preferred way to send emails to leads or franchisees.

Detailed steps for creating these actions can be found in the Help Center, accessible from the FranConnect product.

Franchise Welcome

You can paste the text of any listed template into the template in your FranConnect instance. Be sure to change out the graphic labeled “Company Name” with your own corporate logo and customize any areas that are highlighted in yellow to your own company’s information.



Franchise Welcome Workflow

Business Need

When a new lead is added, send an email to the lead thanking them for their inquiry, and send the lead owner a task to inform them that a new lead is in their queue.

Summary

TRIGGER		ACTIONS
	Lead is Added to the System	1) Send CAMPAIGN to the new lead 2) Send TASK to the lead owner
CONDITIONS		

Step by Step

PREPARATION - build necessary templates and workflows before adding workflow	
Templates	Franchise Welcome Template
Campaigns	Franchise Welcome Campaign
WORKFLOW DETAILS	
Type	Standard – Lead is Added
Trigger	**When do you want to execute this workflow?** When a new lead is added to the system
Condition	**Which leads do you want to execute this workflow on?** All Leads
Workflow	**Perform following action(s) when this workflow is executed** Send Email Campaign – Thank you for your inquiry!

Notes

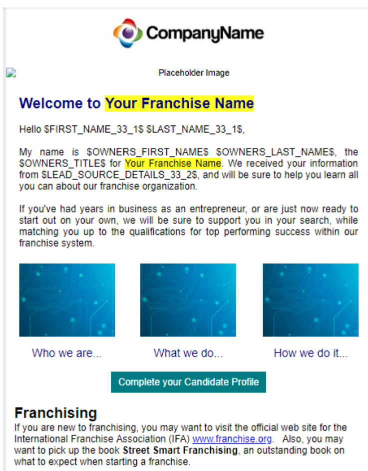
Franchise Welcome Campaign

Using a campaign will enable you to check on receipt, open and click rates for this email later.

PREPARATION	
Templates	Franchise Welcome
CAMPAIGN DETAILS	
Campaign	Set sender name and reply address Send the first email: As soon as the campaign is associated with recipients Associated Template: Franchise Welcome
Used in	Franchise Welcome Workflow

Franchise Welcome Template

This template has placeholders for videos about your company (the blue squares). In addition to editing the company name graphic and the highlighted text, you will want to insert your pictures with links to appropriate web pages where the blue squares are.



The formatting for this template is too complex to include in this guide. If you would like HTML code for this template, contact your FranConnect representative.

*To use the HTML code, open your template and drag a One Column block onto the template workspace, then hover over the block to get the content menu. Navigate to the "Edit HTML" (<>) icon, and in the **Edit HTML** screen, replace all the text with text you copy from the .txt file for the template. Click **Update**, and then customize your template!*

The screenshot below shows where to find the block and the menu item.