Springboard to Success

Activities Book – Working the Sales Funnel

With an average cost-per-lead of $105, not following up with a lead essentially means you're throwing marketing dollars down the drain. In this session we'll discuss how to **keep leads moving through the pipeline,** shortening the lead cycle and optimizing your sales efforts.

This book gives you the steps to monitor and manage the progress of leads through the pipeline, identify leads with no recent activity, and automate the movement of leads through your sales funnel.

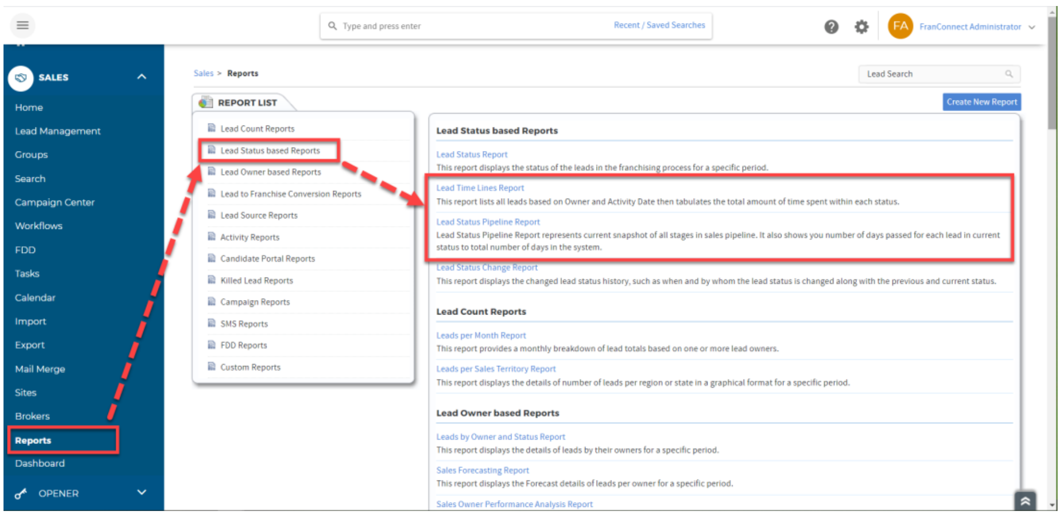
We invite you to use these instructions, to submit questions to training@franconnect.com, and if you're really really stuck, we invite you to schedule a 1:1 session with us to help you through these processes. You can schedule that time using this link: https://tinyurl.com/677y7tz8.

Contents

Tracking Leads Through the Pipeline

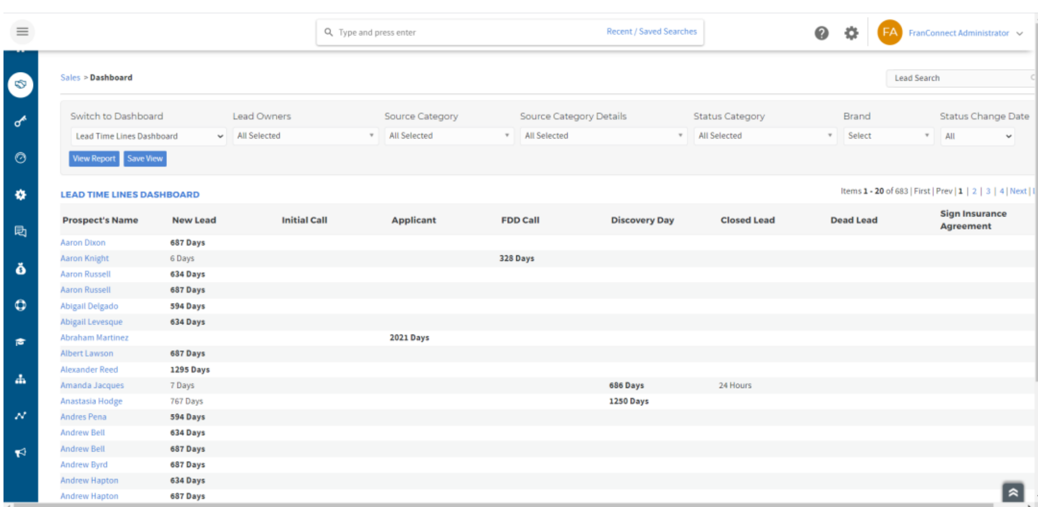
The longer a lead is in the pipeline, the more time and effort that lead costs, but making many touches on every lead is very labor intensive. Three best practices can keep your leads from stalling in the pipeline.

The first of these practices is monitoring the progress of leads through the pipeline. Two reports are especially useful for that. You can reach thes reports from the left navigation bar, by choosing “Reports” under the Sales section, then choosing “Lead Status Based Reports.” You can export these reports to Excel, to share with non-FranConnect users.

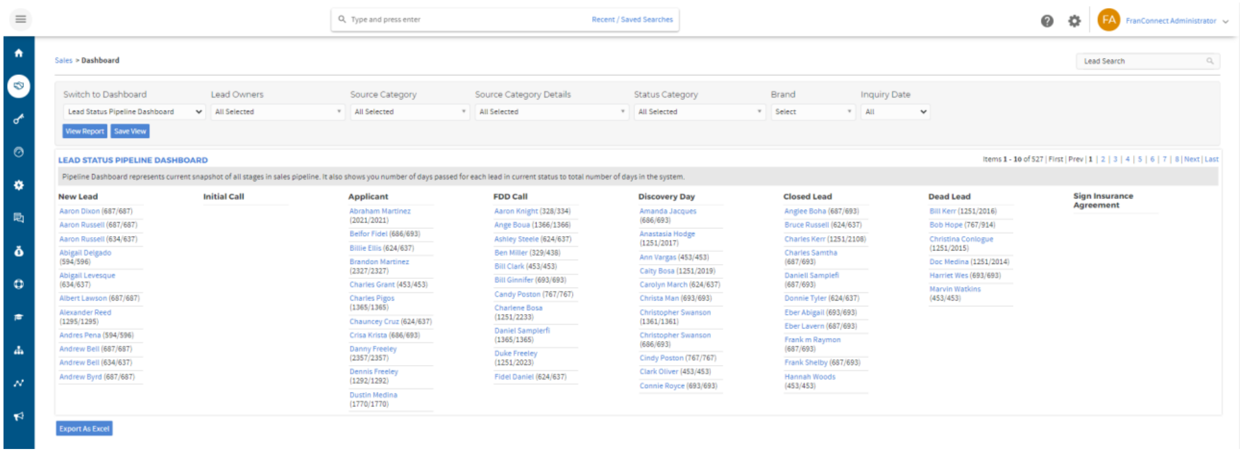


The Lead Timelines Report lets you filter for leads or see all leads, sorted by the prospect’s name. The lead statuses in your system are listed in columns, and you can track a particular prospect’s journey by seeing how many days they were in each phase, and whether they skipped any phases. Click on any prospect’s name to be taken to their record.

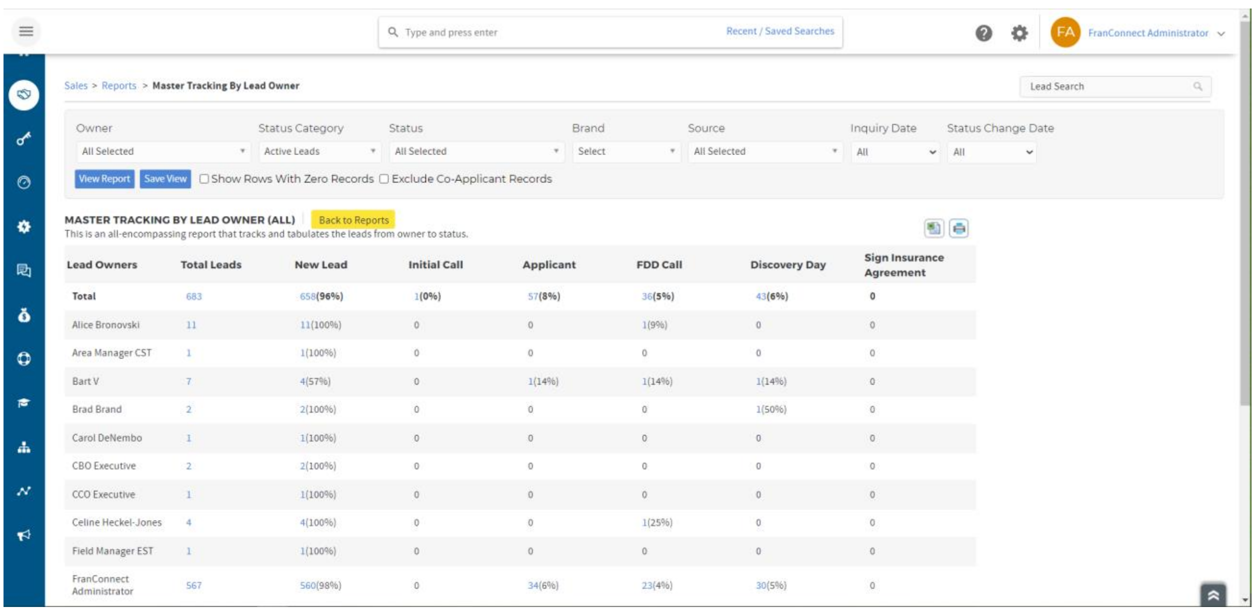
This report helps to troubleshoot any individual leads and identify where they are “stuck” in the system.



The Lead Status Pipeline gives you an overview of the lead funnel, showing which leads are currently in each status and how long they have been in that status, as well as in the pipeline as a whole. For example “Anastasia Hodge (1251/2017)” has been in Discovery Day status for 1251 days, of the 2017 days she has been in the system. Click on the prospect’s name to go to their lead record.



To see a list of the entire lead funnel separated by rep, choose “Master Tracking by Lead Owner”. This report shows you the number and percentage of leads in each phase of the funnel for each rep. You can click on the blue numbers to see a detailed lead list, to troubleshoot how to get these to the next step.



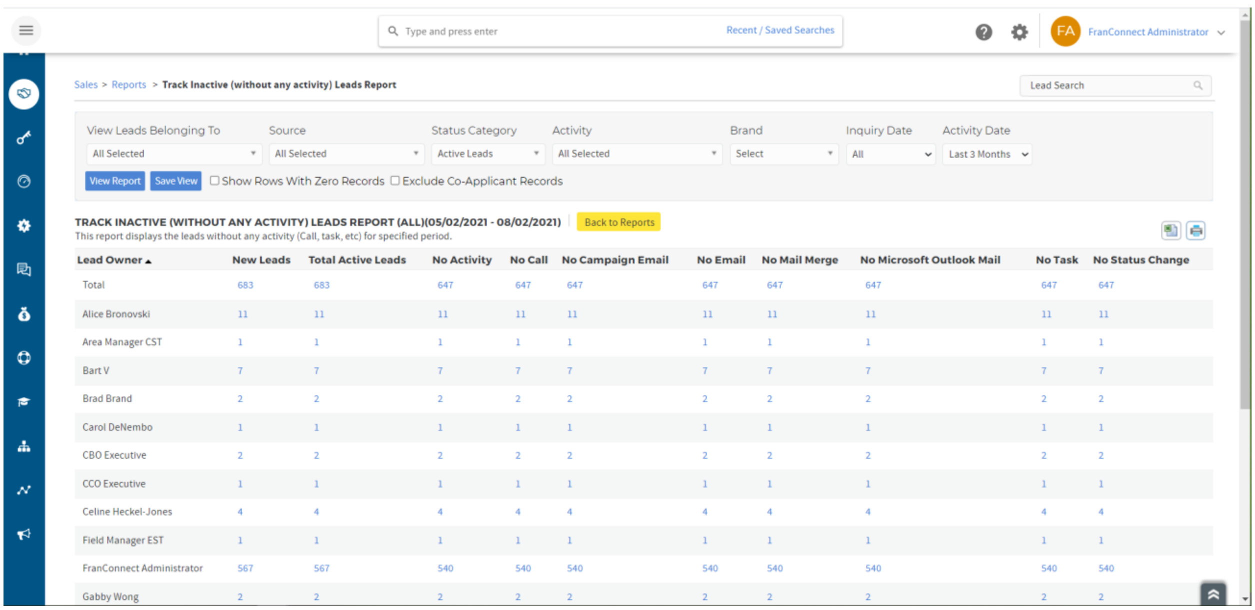
Preventing leads from “slipping through the cracks”

When dealing with a large number of leads, it’s easy for people to fall off of your contact radar. How can you find those people quickly? The Track Inactive Leads Report will show you the number of prospects in each phase of the sales funnel who have not received contact in a specified period of time.

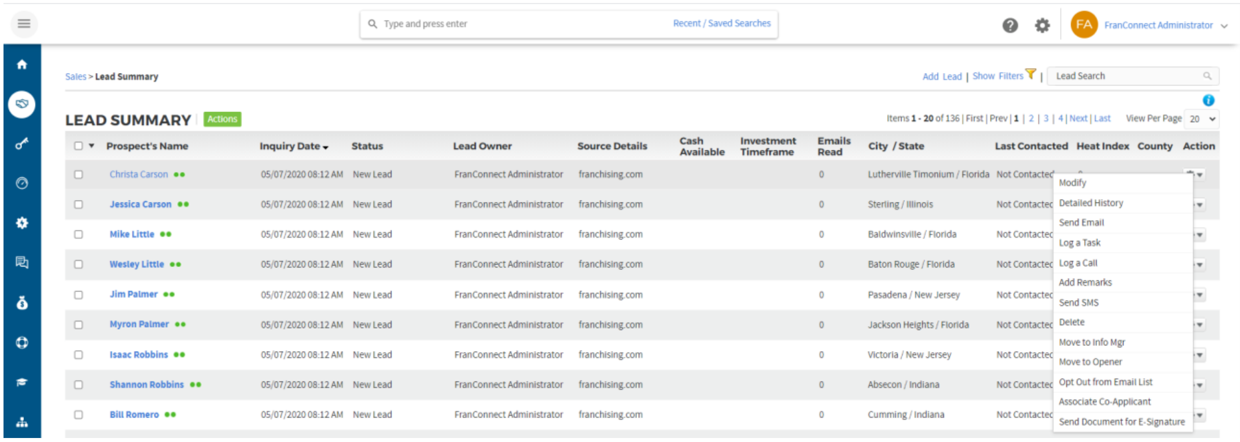
It’s listed by the Lead Owner, so it is easy to follow up with each rep about the items missing in their funnel, and to compare the contact performance and preferences of your reps. Click on the blue numbers to see the lead details for uncontacted prospects with no contact of a particular type.

If you’re looking to monitor only one type of activity (for example you’re encouraging calls and not solely email contact), you can filter for activity type. The prospects listed will be people who have received no call, even if they have received an email – allowing you do distinguish between people who are receiving attention (if not calls) from completely ignored prospects.

If you want to see people with no activity AT ALL, filter for “all activity”. The report below shows leads with no activity whatsoever, so the number of leads is the same all the way across all methods.



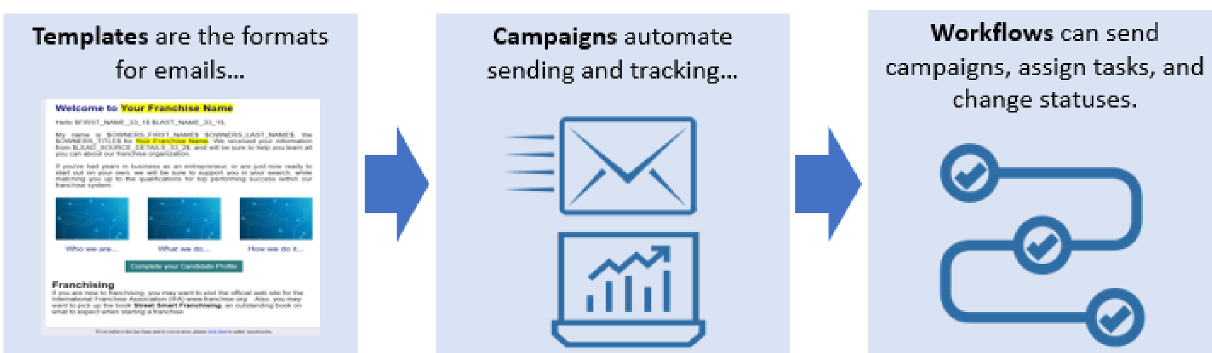
The illustration below shows the detail screen displayed when drilling down into Alice Bronovski’s contacts. You can evaluate these leads by source and major qualifications, and click into the prospect name for more detail, and work with the leads directly by clicking on the action wheel on the right side of the record. In this way, you can quickly review all your leads who need attention, and make (or log) contact right from the list.



Automating lead movement through the pipeline

Introduction to Templates, Campaigns and Workflows

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”).

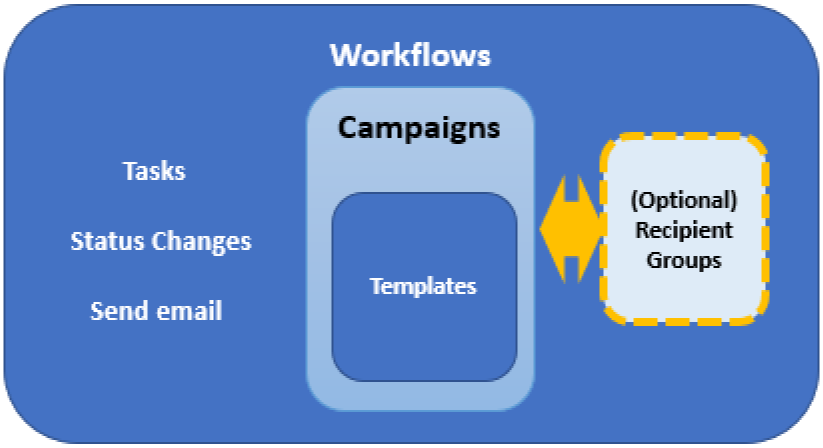
To automate the delivery of a campaign you create a **workflow**. Workflows allow you to create system guidelines for when campaigns are sent, tasks are created, and statuses are changed automatically.

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.

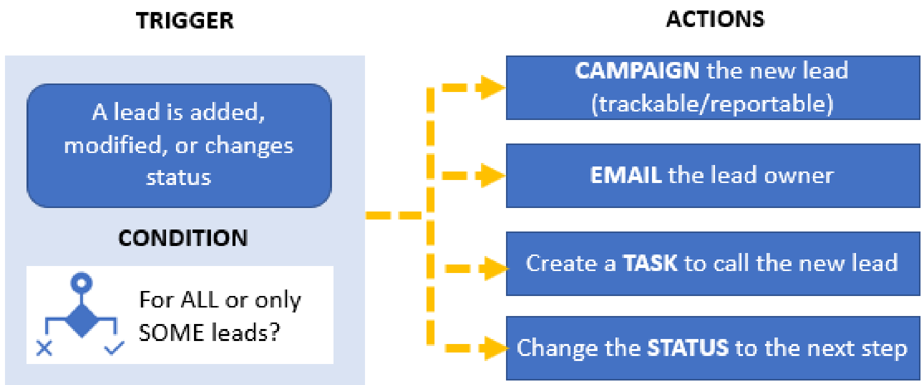
About Recipient Groups

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.

Sales
Record is added/modified
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

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.

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
Send email campaign
Change status
Send email
Create task
Change candidate portal status

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.

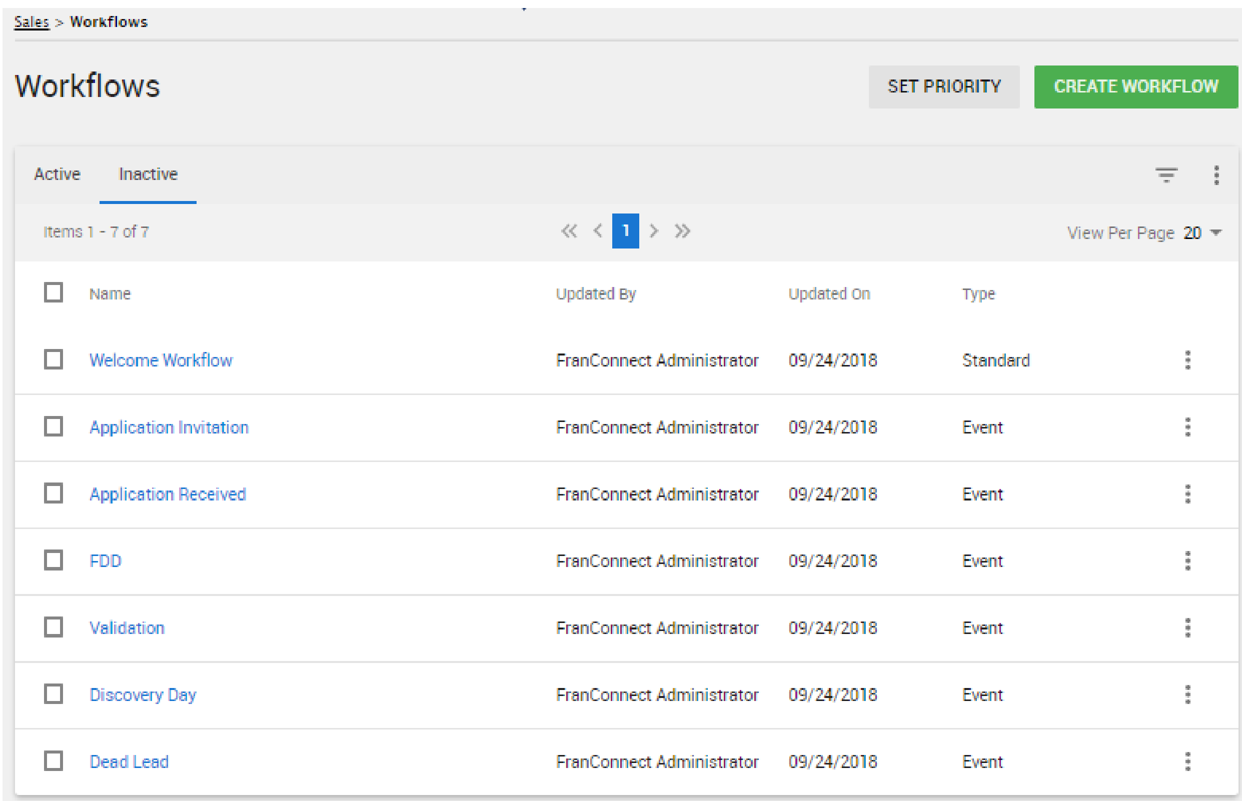
Detailed steps for creating these actions can be found in the Help Center, accessible from the FranConnect product.

Sales Automation

This section gives you the specifications to create templates, campaigns and workflows to accomplish your automation objectives. For step-by-step instructions, please see the Help Center in 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

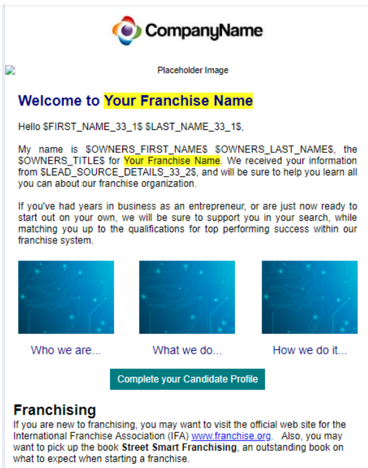
Templates	Franchise Welcome

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

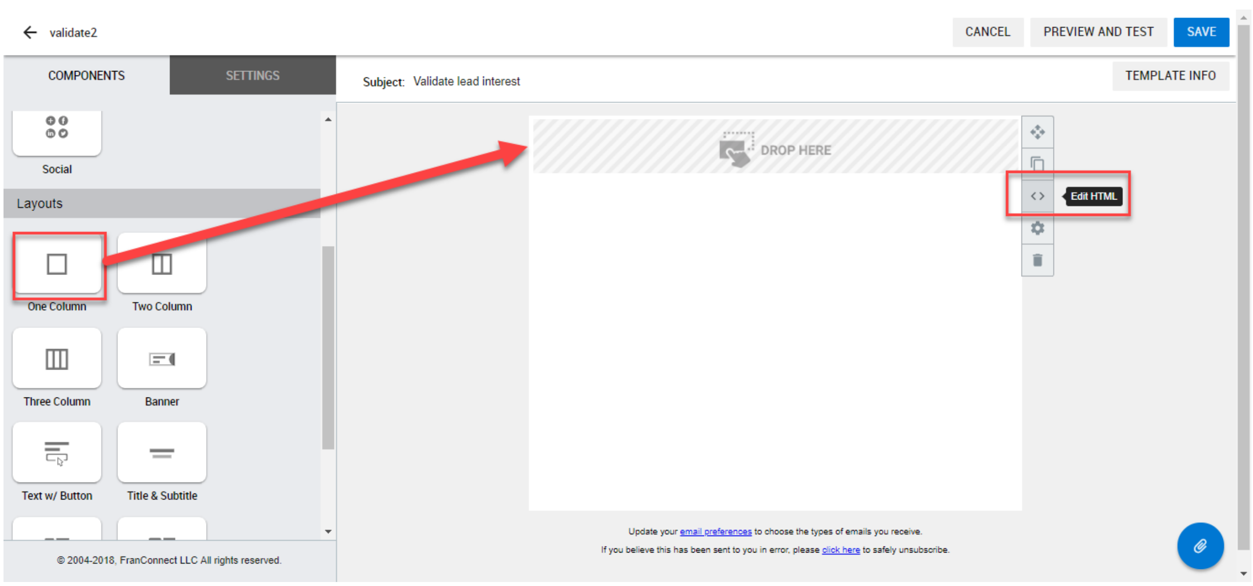
This template has placeholders for videos about your company (the blue squares). In addition to editing the company name graphic and the highlighted text, you will want to insert your pictures with links to appropriate web pages where the blue squares are.



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.



Application Workflows

Application Invitation Workflow

Business Need

When a lead advances to the step of being ready to attend a Discovery Day, send an email with information on how to prepare for Discovery Day.

Summary

TRIGGER	ACTIONS
Lead Status Changes to Discovery Day	1) Send CAMPAIGN to the new lead
CONDITIONS	

Step by Step

PREPARATION - build necessary templates and workflows before adding workflow

Templates	Application Invite
Campaigns	Application Invite

WORKFLOW DETAILS

Type	Event Based
Trigger	**When do you want to execute this workflow?** When Lead Status is changed TO Application FOR All Territories
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 – Apply to be a Franchise Owner

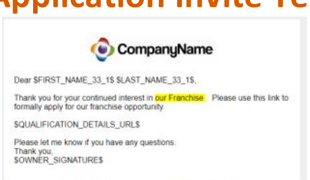
Notes

Application Invite Campaign

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

PREPARATION	
Templates	[Application Invite](#)
CAMPAIGN DETAILS	
Campaign	Set sender name and reply address Send the first email: After this many days – 30 Associated Template: Dead Lead
Used in	[Application Invitation Workflow](#)

Application Invite Template


CompanyName

Dear $FIRST_NAME_33_1$ $LAST_NAME_33_1$,

Thank you for your continued interest in our Franchise. Please use this link to formally apply for our franchise opportunity.

$QUALIFICATION_DETAILS_URL$

Please let me know if you have any questions.
Thank you.
$OWNER_SIGNATURE$

Paste the text on the right into your template and customize the highlighted items.

Dear $FIRST_NAME_33_1$ $LAST_NAME_33_1$,

Thank you for your continued interest in our Franchise. Please use this link to formally apply for our franchise opportunity.

$QUALIFICATION_DETAILS_URL$

Please let me know if you have any questions.

Thank you,
$OWNER_SIGNATURE$

Application Received Workflow

Business Need

When a lead returns an application, change their status to “Application Received” and send a task to the lead owner to let them know that the application is awaiting their review.

Summary

TRIGGER	ACTIONS
Lead Status Changes to Discovery Day	1) Change Status to “Application Received” 2) Create Task “A Lead has completed the application”
CONDITIONS	

Step by Step

PREPARATION - build necessary templates and workflows before adding workflow

Templates	(none)
Web forms	Lead Application Details (included in FranConnect)

WORKFLOW DETAILS

Type	Event Based
Trigger	**When do you want to execute this workflow?** When a Lead fills out the Web Form – Lead Application Details
Condition	**Which leads do you want to execute this workflow on?** All Leads
Workflow	**Perform following action(s) when this workflow is executed** Change Status to “Application Received”

	Create Task – assign to Owner, schedule task time Immediate, fill in the message you would like the owner to receive.

Notes

FDD

FDD Workflow

Business Need

When a lead is sent the Franchise Disclosure Document (FDD), send an email with information on how to read an FDD.

Summary

TRIGGER	ACTIONS
Lead Status Changes to Discovery Day	1) Send CAMPAIGN to the new lead
CONDITIONS	

Step by Step

PREPARATION - build necessary templates and workflows before adding workflow

Templates	Discovery Day
Campaigns	Discovery Day

WORKFLOW DETAILS

Type	Event Based
Trigger	**When do you want to execute this workflow?** When Lead Status is changed TO FDD FOR All Territories
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 – FDD

Notes

FDD Campaign

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

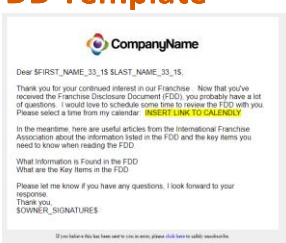
PREPARATION

Templates	[FDD]()

CAMPAIGN DETAILS

Campaign	Set sender name and reply address Send the first email: As soon as the campaign is associated with recipients Associated Template: FDD
Used in	[FDD Workflow]()

FDD Template



Paste the text on the right into your template and customize the highlighted items.

Dear $FIRST_NAME_33_1$ $LAST_NAME_33_1$,

Thank you for your continued interest in our Franchise . Now that you've received the Franchise Disclosure Document (FDD), you probably have a lot of questions. I would love to schedule some time to review the FDD with you.
Please select a time from my calendar: INSERT LINK TO CALENDLY

In the meantime, here are useful articles from the International Franchise Association about the information listed in the FDD and the key items you need to know when reading the FDD.

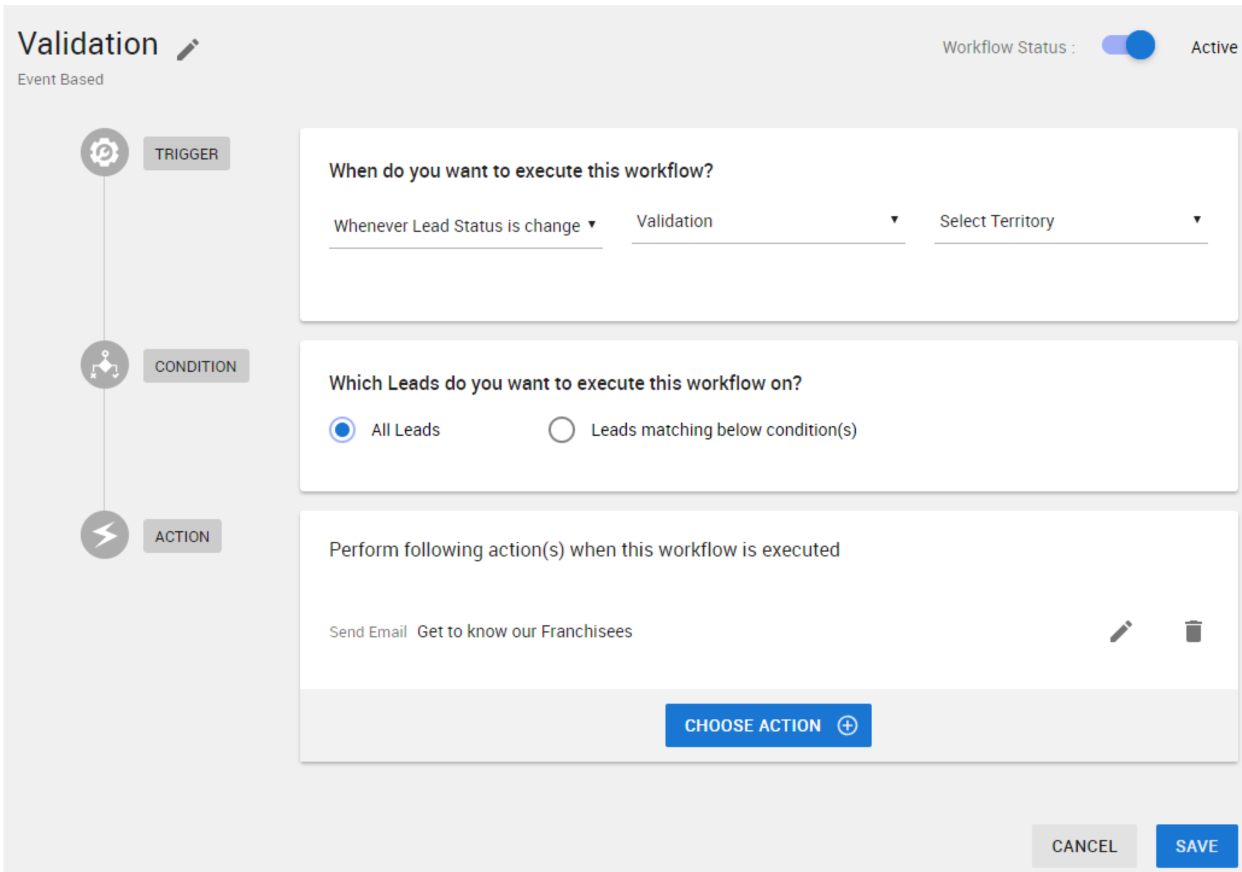
[What Information is Found in the FDD]()
[What are the Key Items in the FDD]()

Please let me know if you have any questions, I look forward to your response.

Thank you,
$OWNER_SIGNATURE$

Validation

Validation Workflow



Business Need

When a lead advances to the step of Validation, send an email with some existing franchisee testimonials.

Summary

TRIGGER	ACTIONS
Lead Status Changes to Discovery Day	1) Send CAMPAIGN to the new lead

CONDITIONS

Step by Step

PREPARATION - build necessary templates and workflows before adding workflow

Templates	Discovery Day
Campaigns	Discovery Day

WORKFLOW DETAILS

Type	Event Based
Trigger	**When do you want to execute this workflow?** When Lead Status is changed TO Discovery Day FOR All Territories
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 – Discovery Day

Notes

The Status "Discovery Day" shown are the ones preconfigured in the Devel FastTrack package…your Status "Discovery Day" may vary. Choose accordingly from your system's Discovery Day-related status.

Validation Template

This template has placeholders for pictures of existing franchisees. In addition to editing the company name graphic and the highlighted text, you will want to insert your pictures with links to appropriate videos, if you have them.

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!*

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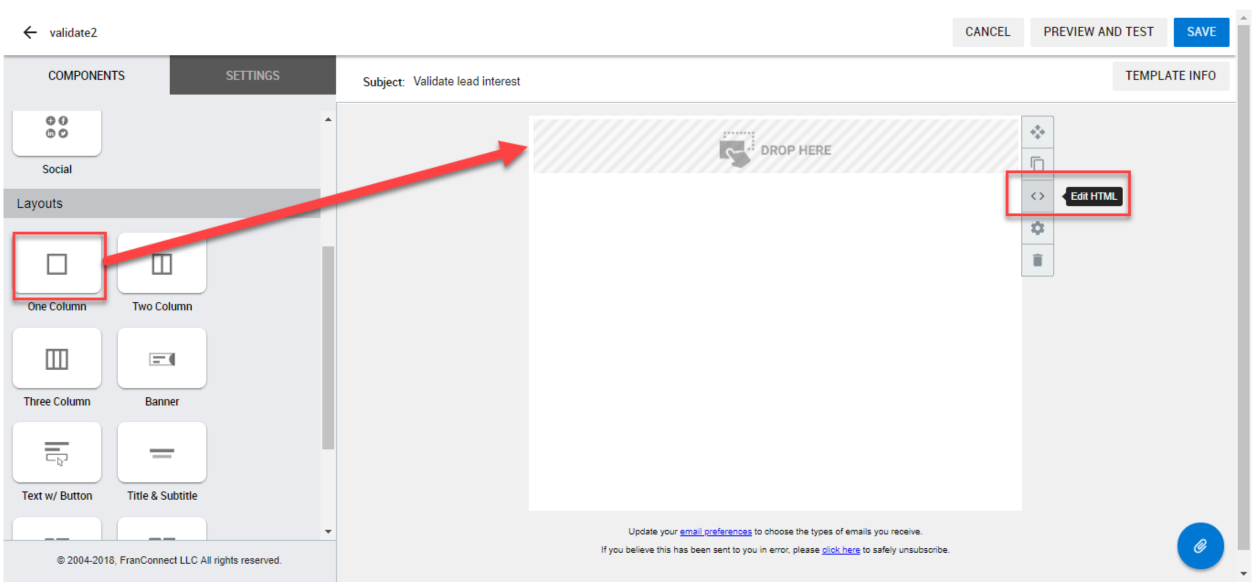

Discovery Day

Discovery Day Workflow

Business Need

When a lead advances to the step of being ready to attend a Discovery Day, send an email with information on how to prepare for Discovery Day.

Summary

TRIGGER	ACTIONS
Lead Status Changes to Discovery Day	1) Send CAMPAIGN to the new lead
CONDITIONS	

Step by Step

PREPARATION - build necessary templates and workflows before adding workflow

Templates	Discovery Day
Campaigns	Discovery Day

WORKFLOW DETAILS

Type	Event Based
Trigger	**When do you want to execute this workflow?** When Lead Status is changed TO Discovery Day FOR All Territories
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 – Discovery Day

Notes

The Status "Discovery Day" shown are the ones preconfigured in the Devel FastTrack package…your Status "Discovery Day" may vary. Choose accordingly from your system's Discovery Day-related status.

Discovery Day Campaign

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

PREPARATION

Templates	Discovery Day

CAMPAIGN DETAILS

Campaign	Set sender name and reply address Send the first email: As soon as campaign is associated with recipients Associated Template: Discovery Day
Used in	Discovery Day Workflow

Discovery Day Template

Paste the text on the right into your template and customize the highlighted items.

Hi $FIRST_NAME_33_1$ $LAST_NAME_33_1$,

We're looking forward to having you come to our Discovery Day and meet our corporate team. We want you to get a good feeling for what Franchisor is all about. If you've never been to a Discovery Day, you may find this article helpful.

How to Get the Most out of a Franchise "Discovery Day"

As always, if you have any questions please don't hesitate to ask.

Thank you,

$OWNER_SIGNATURE$