

# 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](mailto: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>.

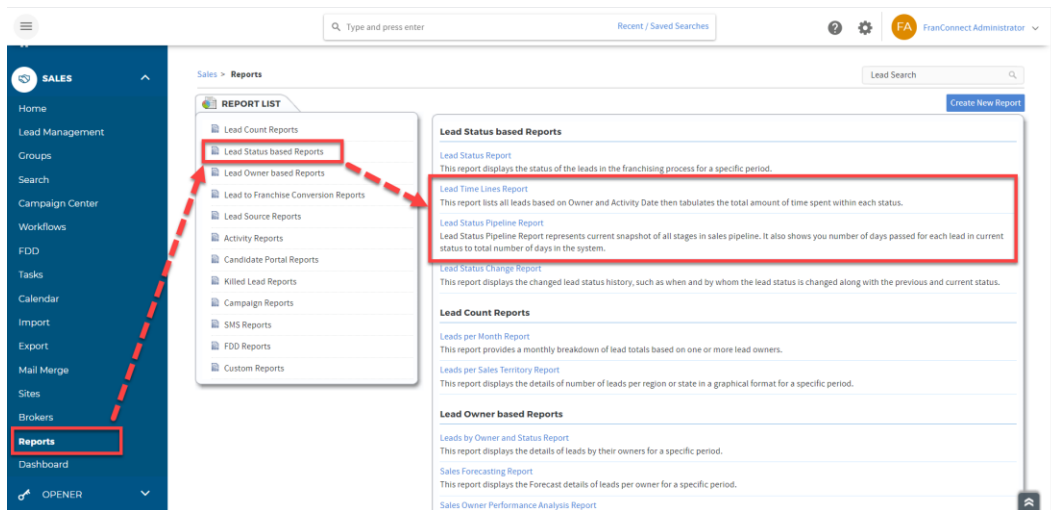
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## Tracking Leads Through the Pipeline

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 these 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.

| Prospect's Name  | New Lead  | Initial Call | Applicant | FDD Call | Discovery Day | Closed Lead | Dead Lead | Sign Insurance Agreement |
|------------------|-----------|--------------|-----------|----------|---------------|-------------|-----------|--------------------------|
| Aaron Dixon      | 687 Days  |              |           |          |               |             |           |                          |
| Aaron Knight     | 6 Days    |              |           | 328 Days |               |             |           |                          |
| Aaron Russell    | 634 Days  |              |           |          |               |             |           |                          |
| Aaron Russell    | 687 Days  |              |           |          |               |             |           |                          |
| Abigail Delgado  | 594 Days  |              |           |          |               |             |           |                          |
| Abigail Levesque | 634 Days  |              |           |          |               |             |           |                          |
| Abraham Martinez |           |              | 2021 Days |          |               |             |           |                          |
| Albert Lawson    | 687 Days  |              |           |          |               |             |           |                          |
| Alexander Reed   | 1295 Days |              |           |          |               |             |           |                          |
| Amanda Jacques   | 7 Days    |              |           |          | 686 Days      | 24 Hours    |           |                          |
| Anastasia Hodge  | 767 Days  |              |           |          | 1250 Days     |             |           |                          |
| Andres Pena      | 594 Days  |              |           |          |               |             |           |                          |
| Andrew Bell      | 634 Days  |              |           |          |               |             |           |                          |
| Andrew Bell      | 687 Days  |              |           |          |               |             |           |                          |
| Andrew Byrd      | 687 Days  |              |           |          |               |             |           |                          |
| Andrew Hapton    | 634 Days  |              |           |          |               |             |           |                          |
| Andrew Hapton    | 687 Days  |              |           |          |               |             |           |                          |

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.

**LEAD STATUS PIPELINE DASHBOARD**

Pipeline Dashboard represents current snapshot of all stages in sales pipeline. It also shows you number of days passed for each lead in current status to total number of days in the system.

| New Lead                   | Initial Call                 | Applicant                    | FDD Call                  | Discovery Day                   | Closed Lead               | Dead Lead                      | Sign Insurance Agreement       |
|----------------------------|------------------------------|------------------------------|---------------------------|---------------------------------|---------------------------|--------------------------------|--------------------------------|
| Aaron Dixon (687/687)      | Abraham Martinez (2021/2021) | Abraham Martinez (2021/2021) | Aaron Knight (128/134)    | Amanda Jacques (686/693)        | Angie Boha (687/693)      | Bill Keri (1251/2016)          | Bill Keri (1251/2016)          |
| Aaron Russell (687/687)    | Benfor Fider (686/693)       | Benfor Fider (686/693)       | Angie Bosa (1366/1366)    | Anastasia Hodge (1251/2017)     | Bruce Russell (624/637)   | Bob Hope (767/914)             | Bob Hope (767/914)             |
| Aaron Russell (634/637)    | Blaine Ellis (624/637)       | Blaine Ellis (624/637)       | Ashley Steele (624/637)   | Ann Vargas (453/453)            | Charles Kerr (1251/2108)  | Christina Conlogue (1251/2018) | Christina Conlogue (1251/2018) |
| Abigail Delgado (594/596)  | Brandon Martinez (2027/2027) | Brandon Martinez (2027/2027) | Ben Miller (329/438)      | Ann Vargas (453/453)            | Charles Samtha (687/693)  | Doc Medina (1251/2014)         | Doc Medina (1251/2014)         |
| Abigail Levesque (634/637) | Charles Grant (453/453)      | Charles Grant (453/453)      | Bill Gamble (693/693)     | Cathy Bosa (1251/2019)          | Daniel Sampieri (687/693) | Harriet Wren (693/693)         | Harriet Wren (693/693)         |
| Albert Lawson (687/687)    | Charles Pigos (1366/1366)    | Charles Pigos (1366/1366)    | Candy Poston (767/767)    | Carlyn March (624/637)          | Donnie Tyler (624/637)    | Marvin Watkins (453/453)       | Marvin Watkins (453/453)       |
| Alexander Reed (1296/1295) | Chauncey Cruz (624/637)      | Chauncey Cruz (624/637)      | Chantene Bosa (1251/2233) | Christa Man (693/693)           | Eder Abjail (693/693)     |                                |                                |
| Andres Pena (594/596)      | Crisa Krista (686/693)       | Crisa Krista (686/693)       | Chantene Bosa (1251/2233) | Christopher Swanson (1361/1365) | Eder Laven (687/693)      |                                |                                |
| Andrew Bell (687/687)      | Danny Freiley (1292/1292)    | Danny Freiley (1292/1292)    | Daniel Sampieri (686/693) | Christopher Swanson (686/693)   | Frank in Raymon (687/693) |                                |                                |
| Andrew Bell (634/637)      | Dennis Freiley (1292/1292)   | Dennis Freiley (1292/1292)   | Duke Freiley (1251/2023)  | Cindy Poston (767/767)          | Frank Shelby (687/693)    |                                |                                |
| Andrew Byrd (687/687)      | Dustin Medina (1276/1276)    | Dustin Medina (1276/1276)    | Fidel Daniel (624/637)    | Clark Oliver (453/453)          | Hannah Woods (453/453)    |                                |                                |
|                            |                              |                              | Fidel Daniel (624/637)    | Connie Royce (683/693)          |                           |                                |                                |

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.

**MASTER TRACKING BY LEAD OWNER (ALL)**

This is an all-encompassing report that tracks and tabulates the leads from owner to status.

| Lead Owners               | Total Leads | New Lead | Initial Call | Applicant | FDD Call | Discovery Day | Sign Insurance Agreement |
|---------------------------|-------------|----------|--------------|-----------|----------|---------------|--------------------------|
| <b>Total</b>              | 683         | 65(96%)  | 1(0%)        | 57(8%)    | 3(5%)    | 43(6%)        | 0                        |
| Alice Bronovski           | 11          | 11(100%) | 0            | 0         | 1(9%)    | 0             | 0                        |
| Area Manager CST          | 1           | 1(100%)  | 0            | 0         | 0        | 0             | 0                        |
| Bart V                    | 7           | 4(57%)   | 0            | 1(14%)    | 1(14%)   | 1(14%)        | 0                        |
| Brad Brand                | 2           | 2(100%)  | 0            | 0         | 0        | 1(50%)        | 0                        |
| Carol DeNembo             | 1           | 1(100%)  | 0            | 0         | 0        | 0             | 0                        |
| CBO Executive             | 2           | 2(100%)  | 0            | 0         | 0        | 0             | 0                        |
| CCO Executive             | 1           | 1(100%)  | 0            | 0         | 0        | 0             | 0                        |
| Celine Heckel-Jones       | 4           | 4(100%)  | 0            | 0         | 1(25%)   | 0             | 0                        |
| Field Manager EST         | 1           | 1(100%)  | 0            | 0         | 0        | 0             | 0                        |
| FranConnect Administrator | 567         | 56(98%)  | 0            | 34(6%)    | 23(4%)   | 30(5%)        | 0                        |

## 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 to 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.

Sales > Reports > Track Inactive (without any activity) Leads Report

View Leads Belonging To: All Selected | Source: All Selected | Status Category: Active Leads | Activity: All Selected | Brand: Select | Inquiry Date: All | Activity Date: Last 3 Months

[View Report](#) [Save View](#)  Show Rows With Zero Records  Exclude Co-Applicant Records

**TRACK INACTIVE (WITHOUT ANY ACTIVITY) LEADS REPORT (ALL)[05/02/2021 - 08/02/2021]** [Back to Reports](#)

This report displays the leads without any activity (Call, task, etc) for specified period.

| Lead Owner                | New Leads | Total Active Leads | No Activity | No Call | No Campaign Email | No Email | No Mail Merge | No Microsoft Outlook Mail | No Task | No Status Change |
|---------------------------|-----------|--------------------|-------------|---------|-------------------|----------|---------------|---------------------------|---------|------------------|
| Total                     | 683       | 683                | 647         | 647     | 647               | 647      | 647           | 647                       | 647     | 647              |
| Alice Bronovski           | 11        | 11                 | 11          | 11      | 11                | 11       | 11            | 11                        | 11      | 11               |
| Area Manager CST          | 1         | 1                  | 1           | 1       | 1                 | 1        | 1             | 1                         | 1       | 1                |
| Bart V                    | 7         | 7                  | 7           | 7       | 7                 | 7        | 7             | 7                         | 7       | 7                |
| Brad Brand                | 2         | 2                  | 2           | 2       | 2                 | 2        | 2             | 2                         | 2       | 2                |
| Carol DeNembo             | 1         | 1                  | 1           | 1       | 1                 | 1        | 1             | 1                         | 1       | 1                |
| CBO Executive             | 2         | 2                  | 2           | 2       | 2                 | 2        | 2             | 2                         | 2       | 2                |
| CCO Executive             | 1         | 1                  | 1           | 1       | 1                 | 1        | 1             | 1                         | 1       | 1                |
| Celine Heckel-Jones       | 4         | 4                  | 4           | 4       | 4                 | 4        | 4             | 4                         | 4       | 4                |
| Field Manager EST         | 1         | 1                  | 1           | 1       | 1                 | 1        | 1             | 1                         | 1       | 1                |
| FranConnect Administrator | 567       | 567                | 540         | 540     | 540               | 540      | 540           | 540                       | 540     | 540              |
| Gabby Wong                | 2         | 2                  | 2           | 2       | 2                 | 2        | 2             | 2                         | 2       | 2                |

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.

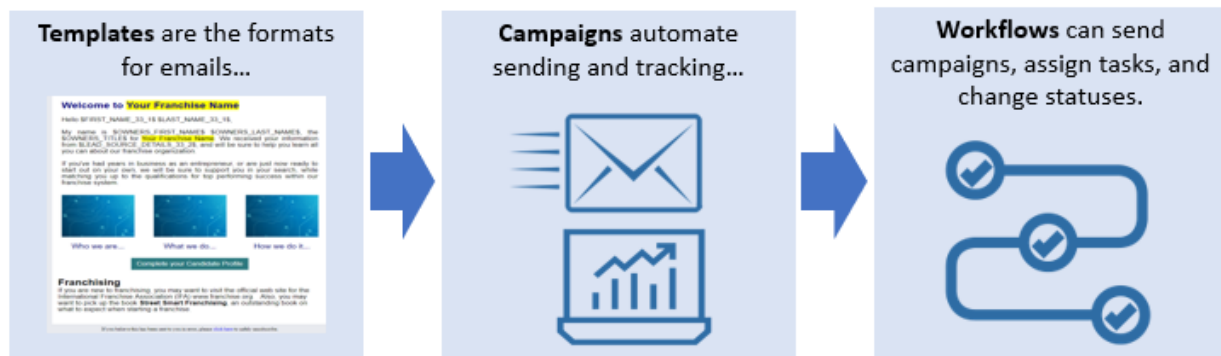
The screenshot shows the 'Sales > Lead Summary' page in FranConnect. At the top, there is a search bar and navigation options. Below is a table with columns: Prospect's Name, Inquiry Date, Status, Lead Owner, Source Details, Cash Available, Investment Timeframe, Emails Read, City / State, Last Contacted, Heat Index, County, and Action. A context menu is open over the lead 'Christa Carson', showing options like 'Modify', 'Detailed History', 'Send Email', 'Log a Task', 'Log a Call', 'Add Remarks', 'Send SMS', 'Delete', 'Move to Info Mgr', 'Move to Opener', 'Opt Out from Email List', 'Associate Co-Applicant', and 'Send Document for E-Signature'.

| Prospect's Name | Inquiry Date        | Status   | Lead Owner                | Source Details  | Cash Available | Investment Timeframe | Emails Read | City / State                   | Last Contacted | Heat Index | County | Action           |
|-----------------|---------------------|----------|---------------------------|-----------------|----------------|----------------------|-------------|--------------------------------|----------------|------------|--------|------------------|
| Christa Carson  | 05/07/2020 08:12 AM | New Lead | FranConnect Administrator | franchising.com |                |                      | 0           | Lutherville Timonium / Florida | Not Contacted  |            |        | Modify           |
| Jessica Carson  | 05/07/2020 08:12 AM | New Lead | FranConnect Administrator | franchising.com |                |                      | 0           | Sterling / Illinois            | Not Contacted  |            |        | Detailed History |
| Mike Little     | 05/07/2020 08:12 AM | New Lead | FranConnect Administrator | franchising.com |                |                      | 0           | Baldwinsville / Florida        | Not Contacted  |            |        | Send Email       |
| Wesley Little   | 05/07/2020 08:12 AM | New Lead | FranConnect Administrator | franchising.com |                |                      | 0           | Baton Rouge / Florida          | Not Contacted  |            |        | Log a Task       |
| Jim Palmer      | 05/07/2020 08:12 AM | New Lead | FranConnect Administrator | franchising.com |                |                      | 0           | Pasadena / New Jersey          | Not Contacted  |            |        | Log a Call       |
| Myron Palmer    | 05/07/2020 08:12 AM | New Lead | FranConnect Administrator | franchising.com |                |                      | 0           | Jackson Heights / Florida      | Not Contacted  |            |        | Add Remarks      |
| Isaac Robbins   | 05/07/2020 08:12 AM | New Lead | FranConnect Administrator | franchising.com |                |                      | 0           | Victoria / New Jersey          | Not Contacted  |            |        | Send SMS         |
| Shannon Robbins | 05/07/2020 08:12 AM | New Lead | FranConnect Administrator | franchising.com |                |                      | 0           | Absecon / Indiana              | Not Contacted  |            |        | Delete           |
| Bill Romero     | 05/07/2020 08:12 AM | New Lead | FranConnect Administrator | franchising.com |                |                      | 0           | Cumming / Indiana              | Not Contacted  |            |        | Move to Info Mgr |

## 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.

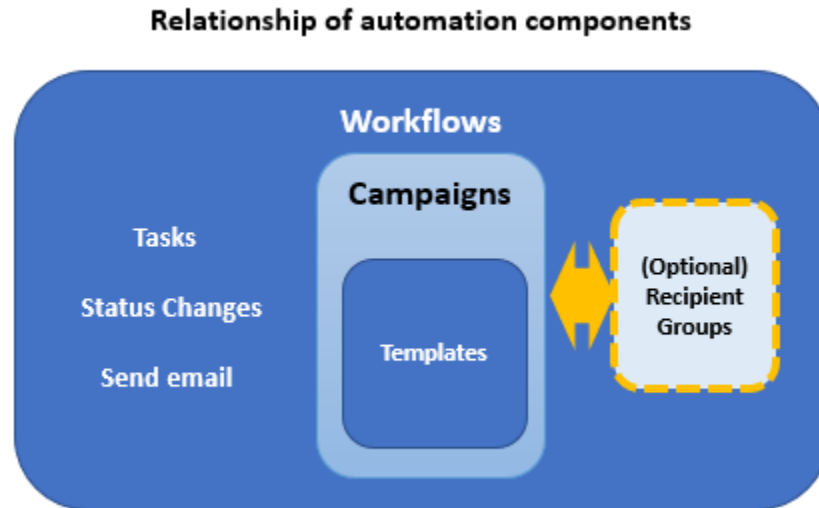
**Campaigns** are groups of email templates, arranged to be sent in a defined order. They can be used for marketing purposes (“Here is why you should buy our Franchise”, informational purposes (“Here are details about this event”) or to gather lead data (“Filling out the application is the next step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



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 FranConnect, 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

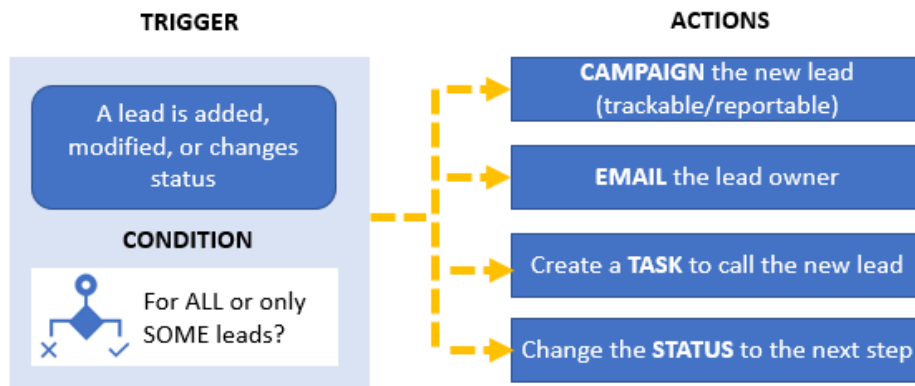
Groups are mailing lists of recipients who match a set of criteria you define based on fields in their profiles. You can build a static group by defining the group once and associating leads, or you can build an automated (Smart) group, which will add new recipients into the group as they enter the system.

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 some 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                           |
| <b>Events:</b>                                     |
| 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.

Sales > Workflows

### Workflows

SET PRIORITY CREATE WORKFLOW

Active Inactive

Items 1 - 7 of 7 << < 1 > >> View Per Page 20



| <input type="checkbox"/> | Name                   | Updated By                | Updated On | Type     |   |
|--------------------------|------------------------|---------------------------|------------|----------|---|
| <input type="checkbox"/> | Welcome Workflow       | FranConnect Administrator | 09/24/2018 | Standard | ⋮ |
| <input type="checkbox"/> | Application Invitation | FranConnect Administrator | 09/24/2018 | Event    | ⋮ |
| <input type="checkbox"/> | Application Received   | FranConnect Administrator | 09/24/2018 | Event    | ⋮ |
| <input type="checkbox"/> | FDD                    | FranConnect Administrator | 09/24/2018 | Event    | ⋮ |
| <input type="checkbox"/> | Validation             | FranConnect Administrator | 09/24/2018 | Event    | ⋮ |
| <input type="checkbox"/> | Discovery Day          | FranConnect Administrator | 09/24/2018 | Event    | ⋮ |
| <input type="checkbox"/> | Dead Lead              | FranConnect Administrator | 09/24/2018 | Event    | ⋮ |

## 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  |
|--|--|
|  <b>Lead is Added to the System</b> | 1) Send CAMPAIGN to the new lead<br>2) Send TASK to the lead owner |
| CONDITIONS   |  |
|                                     |  |

### Step by Step

| <b>PREPARATION</b> - build necessary templates and workflows before adding workflow |   |
|---|---|
| Templates   | <a href="#">Franchise Welcome Template</a>                        |
| Campaigns   | <a href="#">Franchise Welcome Campaign</a>                        |
| WORKFLOW DETAILS  |   |
| Type  | Standard – Lead is Added  |
|   | <b>When do you want to execute this workflow?</b>                 |
| Trigger   | When a new lead is added to the system                            |
|   | <b>Which leads do you want to execute this workflow on?</b>       |
| Condition   | All Leads   |
|   | <b>Perform following action(s) when this workflow is executed</b> |
| Workflow  | 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

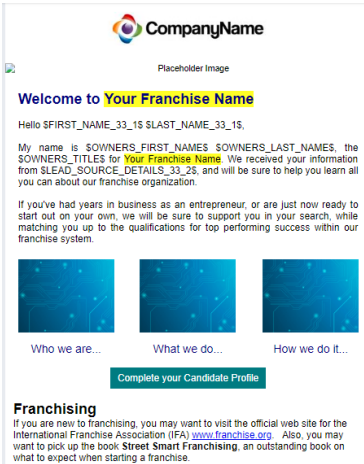
Send the first email: As soon as the campaign is associated with recipients

Associated Template: Franchise Welcome

Used in [Franchise Welcome Workflow](#)

## Franchise Welcome Template

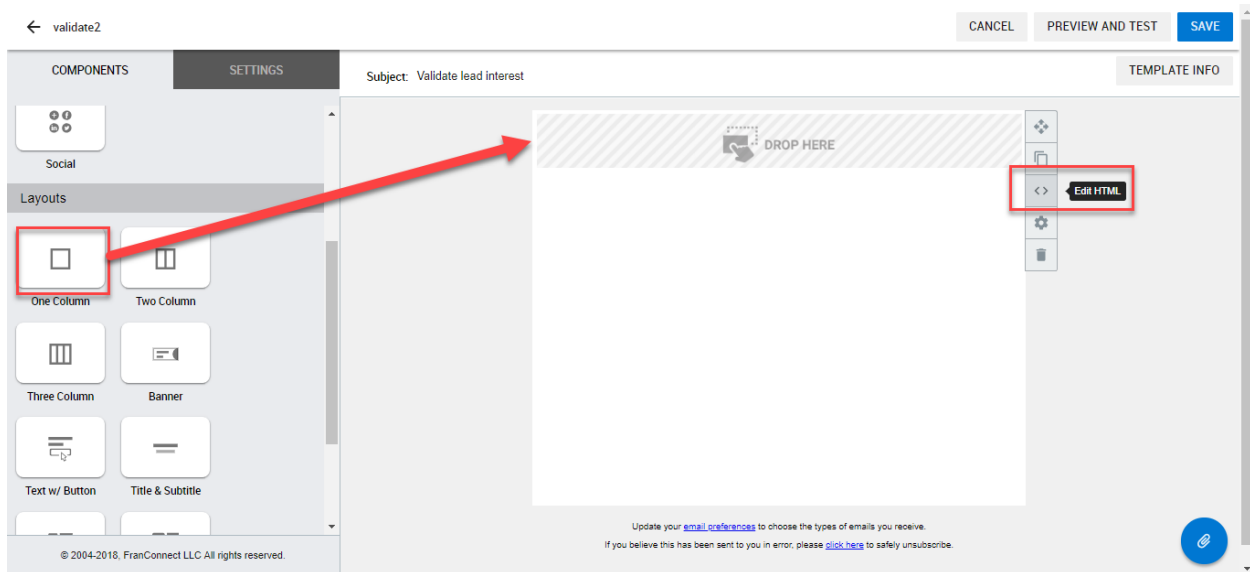
This template has placeholders for videos about your company (the blue squares). In addition to editing the company name graphic and the highlighted text, you will want to insert your pictures with links to appropriate web pages where the blue squares are.



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 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                          |
|---|----------------------------------|
|  <b>Lead Status Changes to Discovery Day</b> | 1) Send CAMPAIGN to the new lead |
| CONDITIONS  |                                  |
|    |                                  |

### Step by Step

| <b>PREPARATION</b> - build necessary templates and workflows before adding workflow |   |
|---|---|
| Templates <a href="#">Application Invite</a>  |   |
| Campaigns <a href="#">Application Invite</a>  |   |
| WORKFLOW DETAILS  |   |
| Type  | Event Based   |
| Trigger   | <b>When do you want to execute this workflow?</b><br>When Lead Status is changed TO Application FOR All Territories |
| Condition   | <b>Which leads do you want to execute this workflow on?</b><br>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

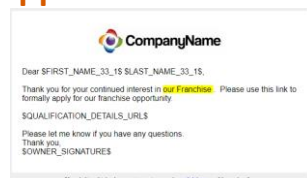
Send the first email: After this many days – 30

Associated Template: Dead Lead

Used in

[Application Invitation Workflow](#)

## Application Invite Template



*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   |
|---|---|
|  <b>Lead Status Changes to Discovery Day</b> | 1) Change Status to “Application Received”<br>2) Create Task “A Lead has completed the application” |
| CONDITIONS  |   |
|    |   |

### Step by Step

|   |   |
|---|---|
| <b>PREPARATION</b> - build necessary templates and workflows before adding workflow |   |
| Templates   | (none)  |
| Web forms   | Lead Application Details (included in FranConnect)            |
| <b>WORKFLOW DETAILS</b>   |   |
| Type  | Event Based   |
| <b>When do you want to execute this workflow?</b>                                   |   |
| Trigger   | When a Lead fills out the Web Form – Lead Application Details |
| <b>Which leads do you want to execute this workflow on?</b>                         |   |
| Condition   | All Leads   |
| <b>Perform following action(s) when this workflow is executed</b>                   |   |
| Workflow  | 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                          |
|---|----------------------------------|
|  <b>Lead Status Changes to Discovery Day</b> | 1) Send CAMPAIGN to the new lead |
| CONDITIONS  |                                  |
|   |                                  |

### Step by Step

| <b>PREPARATION</b> - build necessary templates and workflows before adding workflow |  |
|---|--|
| Templates   | Discovery Day  |
| Campaigns   | Discovery Day  |
| WORKFLOW DETAILS  |  |
| Type  | Event Based  |
| <b>When do you want to execute this workflow?</b>                                   |  |
| Trigger   | When Lead Status is changed TO FDD FOR All Territories |
| <b>Which leads do you want to execute this workflow on?</b>                         |  |
| Condition   | 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

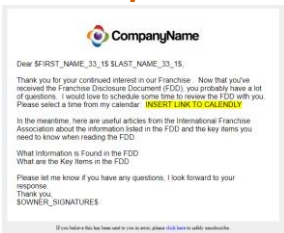
Set sender name and reply address

Campaign 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

#### Validation

Event Based Workflow Status :  Active

**TRIGGER**



When do you want to execute this workflow?  
Whenever Lead Status is change ▾ Validation ▾ Select Territory ▾


**CONDITION**

Which Leads do you want to execute this workflow on?  
 All Leads  Leads matching below condition(s)

**ACTION**

Perform following action(s) when this workflow is executed

Send Email Get to know our Franchisees  


**CHOOSE ACTION** 

**CANCEL** **SAVE**

### Business Need

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

### Summary

| TRIGGER   | ACTIONS                          |
|---|----------------------------------|
|  <b>Lead Status Changes to Discovery Day</b> | 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   | <b>When do you want to execute this workflow?</b><br>When Lead Status is changed TO Discovery Day FOR All Territories |
| Condition | <b>Which leads do you want to execute this workflow on?</b><br>All Leads  |
| Workflow  | <b>Perform following action(s) when this workflow is executed</b><br>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

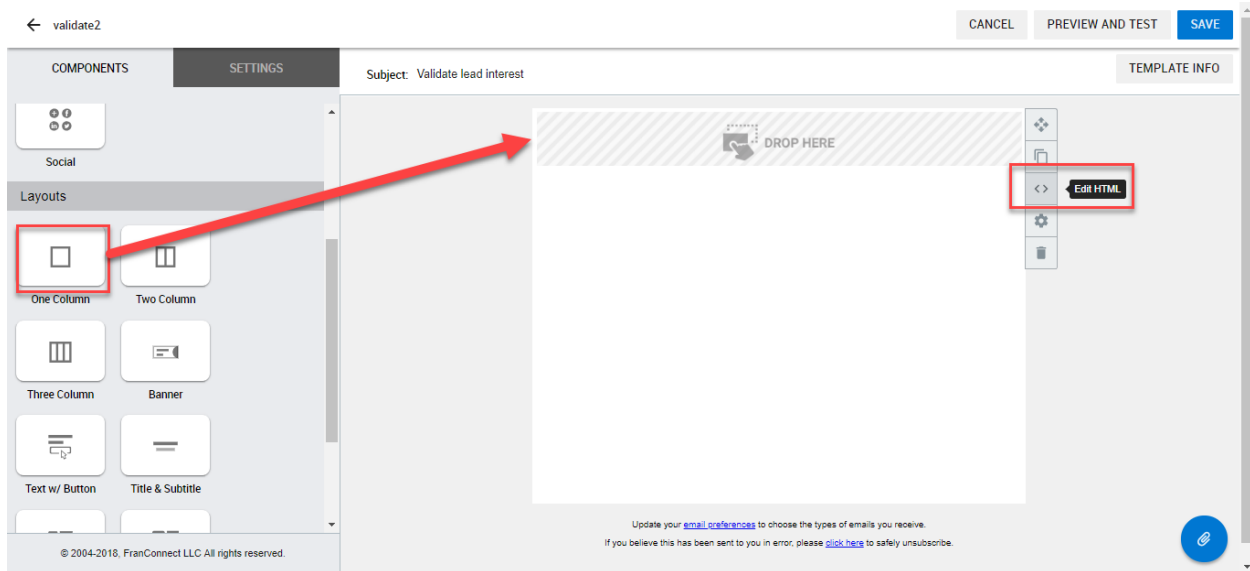
This template has placeholders for pictures of existing franchisees. In addition to editing the company name graphic and the highlighted text, you will want to insert your pictures with links to appropriate videos, if you have them.



*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!*

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





## 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                          |
|---|----------------------------------|
|  <b>Lead Status Changes to Discovery Day</b> | 1) Send CAMPAIGN to the new lead |
| CONDITIONS  |                                  |
|    |                                  |

#### Step by Step

| <b>PREPARATION</b> - build necessary templates and workflows before adding workflow |  |
|---|--|
| Templates   | <a href="#">Discovery Day</a>                                    |
| Campaigns   | <a href="#">Discovery Day</a>                                    |
| WORKFLOW DETAILS  |  |
| Type  | Event Based  |
|   | <b>When do you want to execute this workflow?</b>                |
| Trigger   | When Lead Status is changed TO Discovery Day FOR All Territories |
|   | <b>Which leads do you want to execute this workflow on?</b>      |
| Condition   | All Leads  |

|          |  |
|----------|--|
| Workflow | <b>Perform following action(s) when this workflow is executed</b><br>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.

|                         |   |
|-------------------------|---|
| <b>PREPARATION</b>      |   |
| Templates               | <a href="#">Discovery Day</a>   |
| <b>CAMPAIGN DETAILS</b> |   |
| 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                 | <a href="#">Discovery Day Workflow</a>                                  |

## 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\_SIGNATURES\$