

Contactually 101: Step 10..... Creating the Pinty Tips Program

We have talked a lot at our office about this program and how it is appropriate for just about everyone. Remember, when people are on a program, you will not get the regular follow up reminder for them like you would if they were just in a bucket because they are getting regular follow ups from you via the emails going out. So, if you want reminders to follow up with them, build them into the program.

Under the Programs tab at the top, you will see New Program on the left.

In Name type "Pinty Tips" and hit your tab button.

Click the green button labeled Add New Step.

Type "0" in the number of days box. On the pull down list select Send Message and then select "Pinty Tips 1 – RCS" from the pull down menu. (If your account is not linked with ours, you will not have this message or any of the messages in these instructions, so please contact us about this if the messages are missing.) Uncheck the box "restart waiting period" and uncheck the box "require my approval." Click the blue "save" button and then click the green "add new step" button.

Repeat the step above for whatever frequency you want with the 52 emails I've already written for you or write your own emails (under "emails" section under "settings"). Remember to mix in follow ups if that is important to you. To do follow ups, just select "remind me to follow up" from the first pull down menu.

I would recommend setting either a custom task alerting you when the program is done or a follow up at the end so you can decide what to do with this person.

Once you are totally done with your program, click the blue "I'm done editing" button. Now, go to the buckets tab and apply this to whatever buckets you want to receive this program by using the gear button on the top of that bucket and selecting "edit bucket."