

Contactually 101: Step 9..... Creating your internet lead Program

We have talked a lot at our office about this program and how to handle it for old leads. This is a basic set up, but you can customize it in many ways. For example, you can require your approval before starting the first step to make sure each lead should be getting this program. You do that with any step. You can add in custom tasks or follow ups at any point between these steps. The program below is just emails so edit and add steps as you want.

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

In Name type "Internet Lead Emails" 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 "Internet Lead Drip 1 (0) – 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 using 2, 2, 5 and 5 for the number of days and using "Internet Lead Drip" 2, 3, 4 and 5.

You can extend this email program even further by either repeating the emails above, writing your own (in the "email" section under "settings") or using "Missing buyer" 1, 2 and 3 perhaps with number of days as 7 for each.

After all of these emails are set to go out, you need to decide what to do next. Again, you could have mixed in some follow ups or custom tasks. At the end you might want to have a follow up and then move to a program. To set follow ups, just pick "remind me to follow up" from the first pull down menu. To switch to another program at the end of this program, select "move to program" from the first pull down menu and the name of the program from the second pull down menu. At the end of mine, I'm putting them into my Pinty Tips Program (If you don't know what that is, you should come to our workshops.)

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 your "Internet Leads" bucket using the gear button on the top of that bucket and selecting "edit bucket."