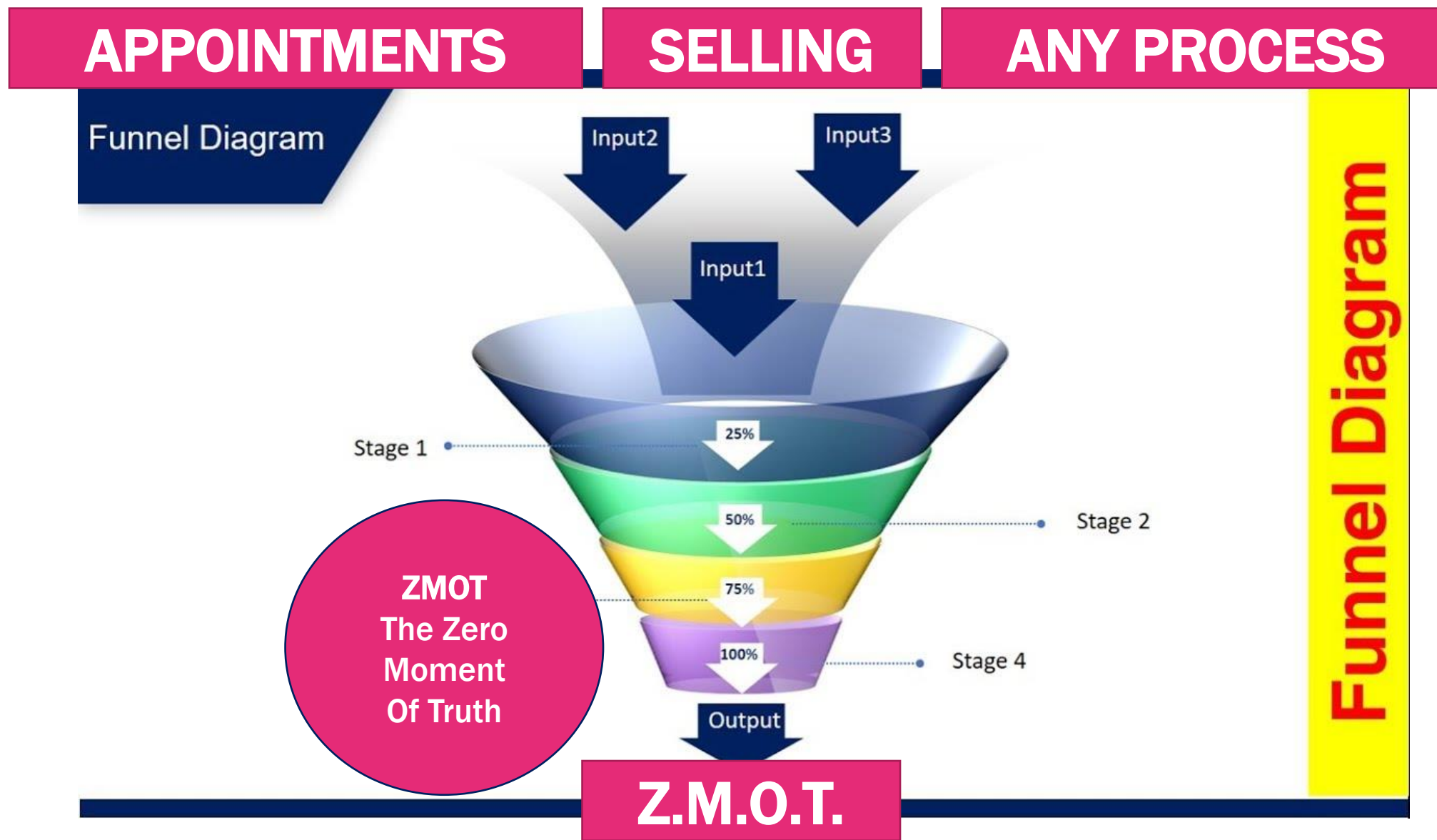




LEAD-FOLLOW-UP.AI

Worksheets & Setup Overview

REGULAR FOLLOW UP MOVES THE RECIPIENT THROUGH THE FUNNEL TO THE ZMOT.



WHAT IS YOUR Z.M.O.T FOR THIS PROJECT?*

**The ZMOT is what we want to achieve. Is it a call?
is it a form? Is it an appointment? Is it a Zoom?
Please discuss.**

**DISCUSS YOUR CURRENT FOLLOW-UP
PROCESSES AND SYSTEMS TO REACH YOUR
ZMOT:**

***Companies will have different and multiple ZMOTs. For example, HR would be different than sales, which is different than marketing. We are going to concentrate on one ZMOT at a time.**

DATA WORKSHEET:

PLEASE DESCRIBE WHERE YOUR DATA RESIDES

CRM - Which one(s)? Spreadsheet(s)?

Discuss How Does Data Get There? (Automated, Manual?)

LEAD QUANTITY: & LEAD SOURCES

Please tell us how many leads per day, week, month, year you receive.

Please describe your lead sources in general terms and quantity from each source:

\$\$\$ WORKSHEET:

DISCUSS YOUR APPROXIMATE COST PER LEAD.

DISCUSS YOUR CURRENT CLOSE RATIO:

DISCUSS YOUR APPROX. PROFIT PER SALE:

DISCUSS YOUR CURRENT FOLLOW-UP PROCESSES AND SYSTEMS:

DISCUSS YOUR SALES TEAM. How many? Is one better than the rest? Etc.

DRAFT PROCESS FLOW:

ZMOT Goal:

Process Flow Map to Reach ZMOT:

1. Data is sent to _____
2. A Reply is sent to _____
3. A followup is sent to _____

We will map the entire process with you, and for you, and that will form the basis of our deliverable and POC.

CRM INTEGRATIONS UNLIMITED.

(And don't forget the powerfully simple exchange of data by spreadsheet).





MARKETING AUTOMATION WE

**USE IS
KEAP/INFUSIONSOFT**

**(IT CONNECTS WITH
EVERYTHING)**

BILLING DATA AUTOMATED AND AUDITABLE (TWILIO):

And we have phone numbers in every country in the world.



A	B	C	D	E	F	G	
From	To	Body	Status	SentDate	Direction	PriceUnit	
19133594800	12135007236	Thank you. The next SMS will arrive s	delivered	2022-08-2	outbound	USD	
12135007236	19133594800		6 received	2022-08-2	inbound	USD	
19133594800	12135007236	Hi. This is the second SMS.. How man	delivered	2022-08-2	outbound	USD	
12135007236	19133594800		799 received	2022-08-2	inbound	USD	
19133594800	12135007236	Hi	delivered	2022-08-2	outbound	USD	
12135007236	19133594800	r@1bu.io	received	2022-08-2	inbound	USD	
19133594800	12135007236	To get started, what's your email add	delivered	2022-08-2	outbound	USD	
12135007236	19133594800	Demo	received	2022-08-2	inbound	USD	
46767266200	46737002449	SMS 3 of 3:	delivered	2022-08-2	outbound	USD	
46737002449	46767266200	How much does it cost?	received	2022-08-2	inbound	USD	
46767266200	46737002449	SMS 2 of 3:	delivered	2022-08-2	outbound	USD	
46737002449	46767266200	How does this work?	received	2022-08-2	inbound	USD	
46767266200	46737002449	Hello __ First name __;	delivered	2022-08-2	outbound	USD	
46737002449	46767266200	DEMO	received	2022-08-2	inbound	USD	
19133594800	12135007236	Hi. This is the second SMS.. no need t	delivered	2022-08-2	outbound	USD	
12135007236	19133594800	R	received	2022-08-2	inbound	USD	
19133594800	12135007236	Hi. This is SMS 1/6. Thanks.	delivered	2022-08-2	outbound	USD	
12135007236	19133594800	r@1bu.io	received	2022-08-2	inbound	USD	



LEAD-FOLLOW-UP.AI

Let's get that Proof of Concept Underway.