MORE COOL CLIENTS

QUICK START GUIDE

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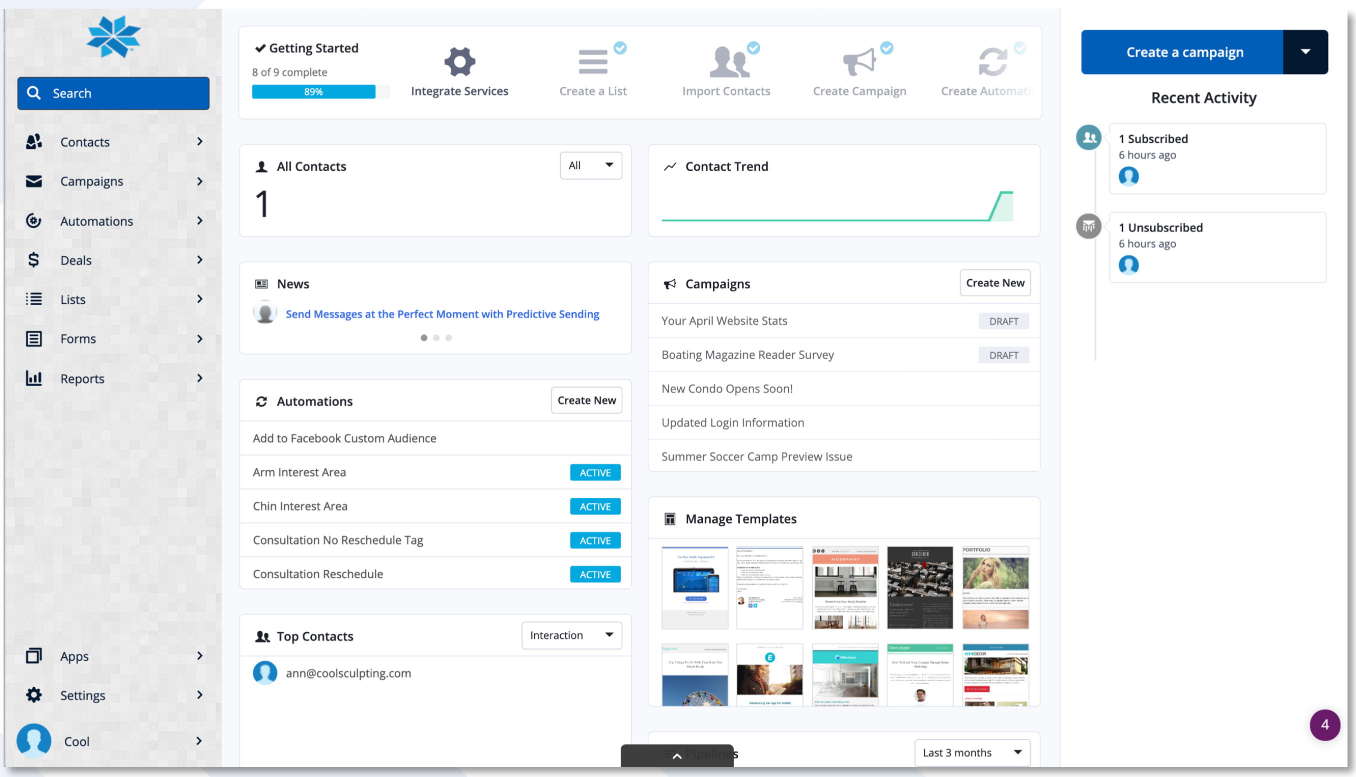
WELCOME TO YOUR COOLSCULPTING
SALES & MARKETING DASHBOARD

Your Sales & Marketing Dashboard is where all of your prospects live along with email campaigns, automations, lists and forms.

When you first login you'll see some snapshots with a menu on the left-hand side. This is your main menu where you will be able to navigate to anything you're looking for.



Here's what you can find in each menu item:

Contacts
- Find contact records for everyone in your system.
- Add tags or view current tags using the sub menu once in Contacts.

Campaigns
- This is where you will go to send a one-off email to a list or group that has specific conditions met.

Automations

- Most of the work in here is done by us. This is where we set up sequences/actions/emails to run automatically in the background based off of certain criteria being met.

Deals

- Your Sales Pipeline lives in here. You'll want to visit this page to work with that.

Lists

- Here you can create new lists or learn more about those already created. This is how we group people based on interests or reasons they would be receiving communication from you

Forms

- This is where we create forms to use on your website for opt ins, events, etc.

Reports

- This is where you can find reports on the campaigns you've sent, automations that are running and the contacts in your database.

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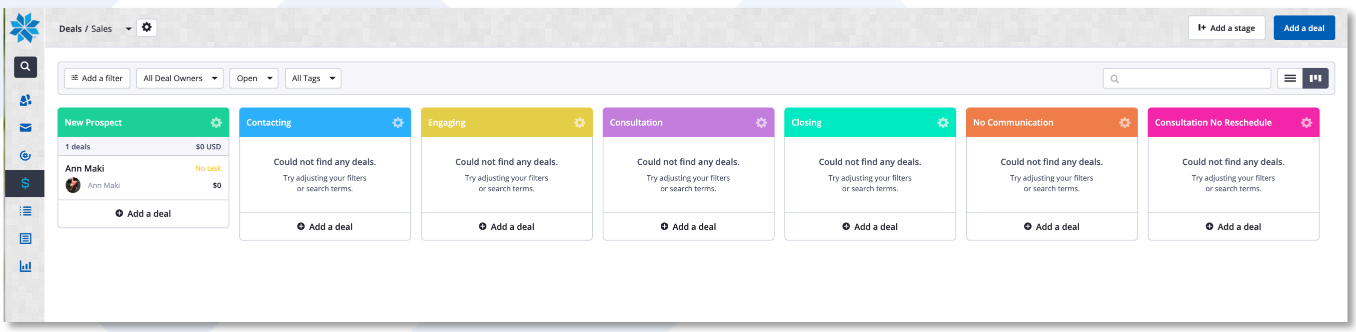
SALES PIPELINE STAGES

There are eight stages that prospects move through in the Sales Pipeline. Once they complete their first CoolSculpting treatment they become customers, not prospects, and would be marked as “Deal Won” and would no longer be in the Sales Pipeline.

As contacts are moved from stage to stage (manually or due to a tag being added) new tasks are assigned and emails may be automatically sent (depending on the stage). Tasks from the stage they were just removed from are automatically removed as new tasks are added.

Below is a description of what each stage is, so you know when to move contacts where.



New Prospect

- Contacts are automatically added to this stage when they enter the Sales and Marketing Dashboard.

Contacting

- Move prospect here once you are ready to begin communication with them.

Engaging

- Move prospect here when you have actually made contact – talked to them on the phone or received a response via text or email, but they have not yet scheduled a consultation.
- Contacts are automatically moved here when they are tagged with “Consultation No Show”.

Consultation

- Move prospect here once they have scheduled a consultation.
- Make sure to input their consultation date and time in their contact record prior to moving them to this stage.

Closing

- Move prospect here once they have completed their consultation.

Deal Won

- Mark the deal as won once the prospect has completed their first CoolSculpting treatment.

No Communication

- Move the prospect here if you cannot get them to respond to any emails/texts/calls when all avenues have been exhausted and tasks complete.

Consultation No Reschedule

- Move the prospect here if they no showed their consultation appointment and don't want to reschedule or if they rescheduled their consultation but now don't want to move forward.

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ACTIONS YOU WILL TAKE

1. **Move them through the Sales Pipeline and mark tasks complete as they're done**
    a. As you complete steps and customers progress, move them through the pipeline based on what step they are in (mentioned above).

2. **Tag as Consultation No Show**
    a. If the client schedules a consultation, but does not show up, tag them as "Consultation No Show" in their contact record. This will run a sequence of emails and assign tasks.

3. **Tag as Consultation Rescheduled (input new date in contact record)**
    a. Once you make contact with the client and they reschedule their missed or cancelled consultation, input the new date in their contact record and tag them as "Consultation Rescheduled".

4. **Tag as Consultation No Reschedule**
    a. If the client cancels a consultation and does not want to reschedule at all or no shows a consultation and will not make contact to reschedule, tag them as "Consultation No Reschedule" in their contact record. This will move them to the Consultation No Reschedule stage and remove tasks.

5. **Input consultation date and time when scheduled**
    a. Once a client schedules a consultation, enter the date and time in their contact record prior to moving them to the Consultation stage of the sales pipeline.

6. **Input consultation follow up date if agreed upon in consultation**
    a. Ask the client when you should follow up if they don't make a decision during the consultation. Input that follow up date in the contact's record.

7. **Mark deal as won**
    a. Once the client has completed their first CoolSculpting treatment, drag them to Mark As Won.

8. **Add notes to client profile as need be**
    a. Use the client's contact record notes section to record notes as you have conversations with the client via phone, text or email so you or anyone else can remember and know what was discussed.

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WHAT HAPPENS IN EACH STAGE BEHIND THE SCENES?

All contacts are automatically added to the New Prospect stage of the Sales Pipeline when they enter the Sales & Marketing system.

As contacts are moved from stage to stage (manually or due to a tag being added) new tasks are assigned and emails may be automatically sent (depending on the stage). Tasks from the stage they were just removed from are automatically removed as new tasks are added.

Below is a description of what happens automatically in each stage.

New Prospect
- New deal is created
- Contact is subscribed to the list Master List
- Contact is subscribed to the list Prospects
- Cool Prospect tag is added

Contacting
- Call, Email and Text tasks are added

Engaging
- Cool Prospect tag is removed
- Hot Prospect tag is added
- Tasks from Contacting stage are marked as complete
- Engaging tasks are added
- After 90 days of no changes (no communication), the contact is automatically moved to the No Communication stage
- Contacts tagged as **Consult No Show** are automatically moved here and the following actions occur:
    - No Show email is automatically sent
    - Call tasks are added

Consultation
- Scheduled Consult tag is added
- Tasks from Engaging stage are marked as complete
- Consultation tasks are added
- Consultation confirmation email is automatically sent
- If the consultation was booked more than a day in advance, a reminder consultation email is sent again the day before their consultation

Closing

- Tasks from Consultation stage are marked as complete
- Closing tasks are added
- Completed Consultation tag is added

Deal Won

- Contact is unsubscribed from the list Prospects
- Contact is subscribed to the list Valued Customers
- Hot Prospect tag is removed
- Cool Prospect tag is removed
- Contact is removed from the Welcome Sequence (will no longer receive those auto prospect emails)

No Communication

- Hot Prospect tag is removed
- Cool Prospect tag is added
- Unengaged tag is added

Consultation No Reschedule

- Previous tasks from stages are marked as complete
- After 90 days of no changes (no communication), the contact is automatically moved to the No Communication stage

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STEP BY STEP INSTRUCTIONS

Finding the Sales Pipeline and moving through the stages

1. Once your logged in to your Sales & Marketing Dashboard, click on the Deals tab on the left-hand menu.
2. You will be taken directly to the Sales Pipeline.
3. To move a contact, grab the box of the record you want to move and drag them with your mouse to the appropriate stage.

Entering task notes to a contact

1. Once in the Sales Pipeline click on the contact you'd like to add notes, dates or tags to.
2. Click on Add a deal note on the bottom of the screen.
3. Type your note and hit save.

Adding dates and tags to a contact record

1. Once in the Sales Pipeline click on the contact you'd like to add notes, dates or tags to.
2. Click on the Personal Info tab at the top of the screen.
3. Dates: Click on the field you'd like to add a date or time to and enter the date/time, then hit save.
4. Tags: Scroll to the tags section, start typing the tag you want to add and select the tag from the list that appears.

Mark a deal as won

1. Once in the Sales Pipeline click on the box of the contact you want to mark as won.
2. A dashed box will appear in the upper left-hand corner that says, "Drag a deal here to mark as won".
3. Drag the contact record to that box.

Tasks – where to find them and how to read them and mark them complete

1. Once in the Sales Pipeline click on the contact you'd like to view tasks for.
2. Scroll down to Deal Tasks.
3. Here you will see all outstanding tasks as well as completed tasks.
4. Click on a task.
5. This will bring up details of the task on the right-hand side of the screen where you can find a script, if applicable, in the Description.
6. To mark a task complete click the blue Complete button to the right of the task.