LEAD MANAGEMENT

Leads Homepage

This page serves several purposes
1. To give you an overview of the status of our leads
2. How to add a new lead to our system
3. How to build custom "Views" to identify defined categories of leads

Lead Categories
1. Hot Lead - This is a lead we have collected with a phone number, email, and zip code that has been created within 7 days
2. Warm Lead - This is a lead we have collected with a phone number, email, and zip code that is between 8-21 days from the creation date

Lead Statuses
1. Not Contacted - This is a new lead that has yet to be contacted by the PLN Team
2. Attempted - This is a lead that has been attempted at least one time
3. Inactive - This is a lead that has exceeded 28 days of attempts
4. Converted - This is a lead that has been converted to a member through our lead execution process

Filter
1. Just to the right of the status header is a button named "Filter", this is used to further define the data you are viewing based on other variables

LEADS JOURNEY

Lead Conversion Journey
Automated Lead Call "Tasks", SMS, and email messaging streamline our efforts in converting interested prospects (leads) to thriving members – i.e. the process of managing interactions with existing and prospective members.

Why?
We are in the process of evolving from primarily an incentive-based strategy to becoming hyper-focused on attracting our prospects to the many benefits of a healthy lifestyle. We know our leads see us as a transformational brand and to maintain our brand equity and promise, we must leverage personal goals and support to enroll new members.

Each touchpoint is a micro-moment of motivation to recognize our potential members at critical milestones of their health journey, in order to drive increased conversion and retention. Our Team members follow an organized and automated strategy to make both the process efficient for the store and a more personalized experience for our members.

LEAN CONSULTATION TRACKING

Actions to Add a New Lean Consultation to Lead
1. Go to the 'information' tab in the lead.
2. Under 'Consultation,' click Add.
3. Select the date and staff member.
4. Add any relevant notes.
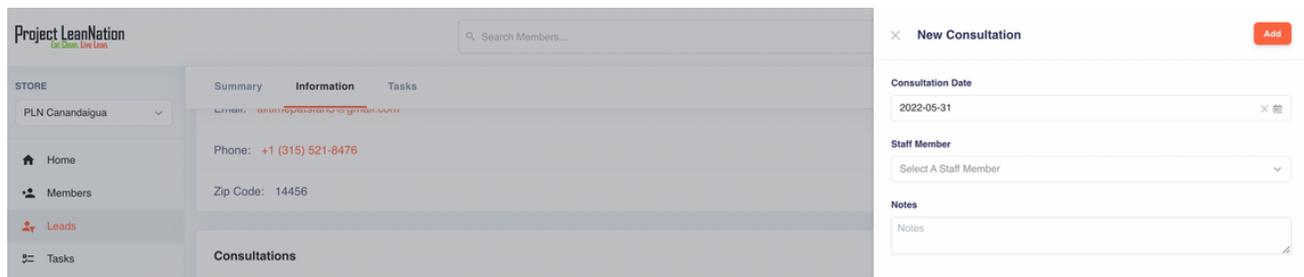
If leads are not followed up within a timely basis, we're potentially leaving a poor impression of the Project LeanNation brand. Thus, we need to engage those leads, who in turn are our prospective members, rather quickly.

Fresh Lead Follow Up Strategy (With Phone Number)

Day 1 - Create Task 1 - Fresh Lead

Automated Email +1 hour: Content - "Thanks for checking us out"

Automated Email +12 hours: Content - "Hitting your goals doesn't have to be hard"

Day 2 - Create Task 2 - Lead Call

Automated Email +24 hours: Content - "Meal prep can be made easy with PLN"

Day 3 - Create Task 3 - Lead Call

Day 4 - Create Task 4 - Lead Call

Day 7 - Create Task 5 - Lead Call

Day 14 - Create Task 6 - Lead Call

Day 21 - Create Task 7 - Lead Call

Day 28 - Create Task 8 - Lead Call

Lead Call Task is Created every 30 Days until they ask us to stop calling

Automated Email - After 24 Hours, Lead is added to our weekly drip

Fresh Lead Follow Up Strategy (NO Phone Number)

Automated Email +1 hour: Content - "Thanks for checking us out"

Automated Email +12 hours: Content - "Hitting your goals doesn't have to be hard"

Automated Email +24 hours: Content - "Meal prep can be made easy with PLN"

Automated Email - After 24 Hours Lead is added to our weekly drip

Abandon Cart Lead Follow Up Strategy (With Phone Number)

Day 1 - Create Task 1 - Fresh Lead

Automated Email +1 hour: abandoned cart email 1

Automated Email +12 hours: abandoned cart email 2

Day 2 - Create Task 2 - Lead Call

Automated Email +24 hours: Content - "Meal prep can be made easy with PLN"

Day 3 - Create Task 3 - Lead Call

Day 4 - Create Task 4 - Lead Call

Day 7 - Create Task 5 - Lead Call

Day 14 - Create Task 6 - Lead Call

Day 21 - Create Task 7 - Lead Call

Day 28 - Create Task 8 - Lead Call

Lead Call Task is created every 30 Days until they ask us to stop calling

Automated Email - After 24 Hours, Lead is added to our weekly drip

Abandon Cart Lead Follow Up Strategy (NO Phone Number)

Automated Email +1 hour: abandoned cart email 1

Automated Email +12 hours: abandoned cart email 2

Automated Email +24 hours: Content - "Meal prep can be made easy with PLN"

Automated Email - After 24 Hours, Lead is added to our weekly drip

Fresh "SMS" Lead Follow Up Strategy (With Phone Number)

Day 1 - Create Task 1 - Fresh Lead

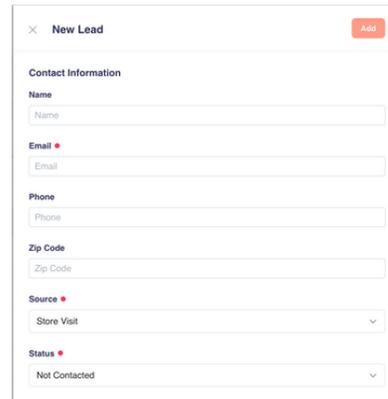Automated Text - Immediately: Thanks for signing up for the PLN + promo

Automated Text - +45 mins: Checking in, any questions?

Full (Fresh Lead With Phone Number Process)

HOW TO ADD A NEW LEAD

Actions to Add a New Lead
1. Click the 'Add' button
2. Add Name, Email, and Phone
3. Select Source
4. Select Status

HOW TO ADD NOTES TO A LEAD

Actions to Add Lead Notes
1. In the 'Lead Details' add any notes that would help your team assist in converting this lead. This field does not save cumulative notes over time, it will only display the most recent note made
2. Below in the 'Summary' tab 'Add a Note' that would be used internally to manage the lead and will be passed to the Members module upon conversion. This will have a historical timestamp

HOW TO CONVERT LEAD TO MEMBER

Actions to Convert Lead To Member
1. Select the button on the top left with 3 dots
2. Click on 'Convert to Member'
3. Select a 'Plan'
4. Select the 'First Fulfillment Date'
5. Hit 'Add' and it will take you to the next step
6. From here follow the basic New Member Add process
7. If it is after the system cut off of 11 am Thursday, follow the Late Add Member Process