Boost Engagement and Improve Retention with Custom Workflows

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Note

You can request your template custom workflow recipes using our new request form. Be sure to watch the help articles below to ensure you know:

- How to customize the workflow(s) for your use case(s)
- How they work, including key steps that must take place

Customizing Goal Review Workflows 1 & 2

Watch the video below to find out how to customize Goal Review Workflows 1 & 2. This video covers:

- Customizing the email content
- Editing the wait steps, including options to suit your use case

Note

If you are using Workflow 2 (to automatically re-add clients back into Workflow 1) it is essential that Goal Review appointments are marked as 'Showed'. This is the trigger for Workflow 2 - so without this action, the process will stop.

We recommend scheduling a recurring weekly reminder for your team to prompt them to mark their appointments as 'showed'.

Adding Contacts to the Goal Review Workflows

Next, watch the following video to find out how to add your contacts to the Goal Review workflows. This includes:

- Adding for a one-off Goal Review campaign
- Adding automatically as part of your 'New Client' process, when a contact is marked as 'Won'.

Goal Review Follow Up Campaign

First, watch the below video on how to set up custom fields to collect the goal setting information from your review meetings.

Customizing the Goal Review Follow Up Campaign

The following video explains how to customize the Goal Review follow-up campaign, including:

- Editing the email content
- Editing the wait steps
- Adding your custom fields into the email content

Adding Contacts to the Goal Review Follow Up Campaign

The following video then shows you how to add contacts to this follow up campaign, including:

- Manually adding contacts
- Automatically adding contacts, once their Goal Review appointment is marked as showed.

Editing the Event Countdown Workflow

The following video walks you through how to edit the Event Countdown workflow, including:

- setting the event date
- editing the wait steps
- editing the email / sms content
- editing the follow-up action(s) such as internal notifications or emails to the contact

Adding Contacts to the Event Countdown Workflow

This final videos walks you through how to add contacts to the event countdown workflow.

- Tags
- Resources
- Webinar