PERQUE INTEGRATIVE HEALTH

Processes

Account Requests

Steps:

1. Client Services receives notification email
2. Client Services reviews account request
3. Client Services adds appropriate tag to contact profile (the notification email will specifically explain what to do)
4. Tasks will automatically be added
5. Notes will automatically be created
6. Customer will be placed into the Hot Prospect stage of Business Development
7. Kacie is tasked to utilize direct mailing

Note: While on Step 3, if Client Services decides to not move forward with the customer at that time for any reason other than a long-term, permanent reason they will need to reach out manually to explain why if they desire to (this part can't be automated as there are too many variables.

Sample Requests

Steps:

1. PERQUE Client Services receives notification email
2. PERQUE Client Services reviews request to determine if we should send the sample to the customer **AND if we have the sample in stock**
3. Client Services adds appropriate tag to contact profile (the notification email will specifically explain what to do)

4. If customer tries to order multiple samples, please begin with the sample(s) that ARE in stock and save the sample(s) that are out of stock or not available for any reason for the end. Reason: if you tell the system that you will not be sending the sample to the customer, the tag you add will stick on their account for 15 minutes and will alter the other automation they are currently in. Please begin with the sample(s) that are available
5. If moving forward with sending the sample, an email will go out to the customer saying we shipped the sample
6. Notes will automatically be created
7. Customer will enter Prospect 15/7 if they weren't in there already
8. Tasks will automatically be created for Hona to follow up
9. Automated emails will be scheduled to go during the 15/7
10. Kacie is tasked to utilize direct mailing
11. Customer will be placed into the Hot Prospect stage of Business Development

Note: While on Step 3, if Client Services decides to not move forward with the customer at that time for any reason other than a long-term, permanent reason they will need to reach out manually to explain why if they desire to (this part can't be automated as there are too many variables.

Business Development Handoffs

Steps:

1. Mark current deal as "Won"
2. Add new deal using Deal Title EAB, PERQUE, or PIH
3. Assign deal to the rep that will be taking over the account
4. Place customer in either EAB or PERQUE Handoff stage
5. In the Deal description, label the letter grade of the customer. For example: B

Webinars

Steps:

1. Customer provides their contact information in exchange to watch our webinars
2. A note will be added to the account if they already have a deal and are in our system
3. After watching webinar, customer will begin to receive automated email series
4. Once automated email series concludes, a note will be added to the account saying they finished the email series if they have a deal already

5. If they do not have a deal with us, our contact scoring system will determine whether or not they will acquire a deal. It takes a contact score of 10 points in order to have a deal created

Events

Steps:

1. Customer provides their contact information at an event
2. A note will be added to the account if they already have a deal and are in our system
3. If the customer is not in our system, they will be added to either the Lead, Prospect, or Hot Prospect stage of Business Development
4. Depending on stage, there may be follow up emails, tasks, and notes added to the account

Commenting and tagging (Only Comment & Tag on Deal Notes ONLY)

If you are going to comment and tag someone on recent activity, please do so on the **notes section ONLY.**

The comment system on ActiveCampaign needs a little work and while I try to get ActiveCampaign to make it easier to use we have to use what they offer.

Keep comments and tagging of co-workers on notes ONLY in the Deals section.

When you're tagged in a comment, you'll receive an email notification with a button. However, when you click that button it will take you to the contact profile and not directly to where the comment lives.

You, unfortunately for now, will have to go to that customer's deal and filter to the their notes in order to find the comment.

Steps:

1. Get tagged in a comment in the Deal Notes section and receive email notification of you being tagged
2. Click on button they provide to go to the contact's profile
3. Click the tab to go their Deals and select their open deal
4. On recent activities at the bottom, filter to the notes section
5. Find the note you were tagged in

How to Determine if Contact is a Customer or Prospect vs. Regular Contact in System

To determine whether or not a contact is a customer of ours or a prospect, look to see whether or not they have a deal attached to their name.

Click the deals tab and look to determine who is the owner of the contact, what stage and pipeline the contact is in, etc.

Using Deals For All Notes and Tasks

Whenever you add a note or task please do so in the Deal section of a contact. This will allow us to keep all deals and tasks in one spot when the system does allow multiple.

Understanding Contact Scoring

We will start ActiveCampaign with a simple contact scoring system. This, for now, will only apply to Business Development and will help us determine who is a lead and who is a prospect.

Because our systems (CRM and Email Marketing) are connected, we will be able to track what the customer does at all times. This could be things like opening an email, visiting a webpage, watching a video, etc.

While they are interacting with our Sales & Marketing efforts, we will be tracking their progress using something called a Contact Score.

Once a healthcare practitioner reaches a score of 10 or more they will automatically be considered a Prospect and will begin to receive Prospect 15/7 messaging from Business Development.

If a customer does the following they will receive points:

Open an email: 1 point
Click a link in an email: 2 points
Visit perque.com, elisaact.com, or perqueintergrativehealth.com more than once: 2 points
If they are a healthcare practitioner: 3 points
Visit the account setup form pages on EAB and/or PERQUE multiple times: 5 points

PERQUE INTEGRATIVE HEALTH

Sending an order to PERQUE & EAB

Add a note of what you want to send to Client Services

Go to Recent Activities on the right and scroll to "Notes"

Click comment and use the @ symbol to tag who you want to send it to.