Automated Inquiry Follow-Up Workflow

WHAT IS AN INQUIRY FOLLOW-UP WORKFLOW?

Through Dubsado automation, we can ensure that your potential clients instantly receive a message from you. With an inquiry follow-up, you'll know that each potential lead that contacts you will receive:

- Instant welcome message + access to schedule a call with you
- Gentle nudge if they do not schedule a call
- A final goodbye before you move on

WHY YOU NEED IT?

We live in a fast-paced world. You can just about bet if you receive a lead from a potential client; they've also contracted 2 to 3 other service providers. So, what sets you apart from the competition? Imagine losing a lead because you took too long to reply or dropped the ball when nudging them to schedule a call with you. Well, those days of lost leads end today.

THINGS TO KEEP IN MIND...

Dubsado does not have a negative action like "if a call is NOT scheduled," so to create an automated follow-up sequence, we have to work a bit of Dub magic and create a workaround.

This workaround involves TWO Discovery Call scheduler templates. They should be duplicates of each other, the only difference being the titles. I like to do something subtle like "Discovery Call" and "*Discovery Call" (notice one has an astrick at the beginning of the title, the other does not.

Since you will have two schedulers sending within the same workflow, we'll also need to double the final actions in the workflow. This way, Dubsado will trigger the following action based on which scheduler template the lead uses.

If you'd like your lead to receive more than one nudge, you can repeat the "send appointment scheduler" step. But remember that you'll need a new scheduler template each time. If you plan to send more than two nudges, I suggest using the portal instead of the scheduler links within the email.

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GETTS ASSIST

	Action	Timing	Content	Notes
1	Send Appointment Scheduler	Immediately after workflow started	• Discovery Call Scheduler • Welcome Email	Your email should be an initial "hello" and include the {{scheduler | schedulerLink}} smart field.
2	Change Project Status	One day after previous actions	• "Pending Discovery Call" Project Status	It's helpful to have project statuses that reflect where the lead is in your process.
3	Send Appointment Scheduler	1 day after previous actions	• Secondary Discovery Call Scheduler • Secondary Welcome Email	When sending a schduelr, Dubsado will send a new version of your scheduler. So, to make sure the triggers beyond this point work, you'll need a secondary discovery call scheduler template (a duplicate of your original scheduler) This email should be a reminder to schedule and let the lead know this is your final follow-up.
4	Add Tag to Project	1 day after previous actions	• "Lost Lead" Project Tag	This tag will allow you to search your system in the future for lost leads if you ever decide to create a nurture sequence.
5	Start Workflow (x2)	After appointment Scheduled	• Post Discovery Call Workflow	Once the lead schedules an appointment, you'll want to start your post-appointment workflow if you have one.
6	Pause Workflow (x2)	0.02 hours after appointment scheduled		This pause will ensure the lead does not receive the nudge to schedule if they do not need it.

YOUR INQUIRY WORKFLOW SHOULD LOOK LIKE THIS...

send appointment scheduler **Discovery Call** immediately after workflow started Edit / Remove

change project status immediately after all previous actions complete Edit / Remove

send appointment scheduler ***Discovery Call** 1 day(s) after all previous actions complete Edit / Remove

add tag **Lost Lead** 1 day(s) after all previous actions complete Edit / Remove

start a workflow **Post Discovery Call** immediately after an appointment is scheduled Edit / Remove

start a workflow **Post Discovery Call** immediately after an appointment is scheduled Edit / Remove

pause workflow 0.02 hour(s) after an appointment is scheduled Edit / Remove

pause workflow 0.02 hour(s) after an appointment is scheduled Edit / Remove

IF THE LEAD SCHEDULES WITH THE FIRST SCHEDULER LINK, YOUR WORKFLOW WILL TRIGGER LIKE THIS...

send appointment scheduler **Discovery Call** 10/27/23 9:51 AM

change project status 10/27/23 9:51 AM

send appointment scheduler ***Discovery Call** 10/28/23 9:51 AM Edit / Remove / Mark Completed / Force Now

add tag **Lost Lead** 1 day(s) after all previous actions complete Edit / Remove / Mark Completed / Force Now

start a workflow **Post Discovery Call** 10/27/23 9:51 AM

start a workflow **Post Discovery Call** immediately after an appointment is scheduled Edit / Remove / Mark Completed / Force Now

pause workflow 10/27/23 9:53 AM

pause workflow 0.02 hour(s) after an appointment is scheduled Edit / Remove / Mark Completed / Force Now

IF THE LEAD SCHEDULES WITH THE SECOND SCHEDULER LINK, YOUR WORKFLOW WILL TRIGGER LIKE THIS...

send appointment scheduler **Discovery Call** 10/27/23 9:53 AM

change project status 10/27/23 9:53 AM

send appointment scheduler ***Discovery Call** 10/27/23 9:53 AM

add tag **Lost Lead** 10/28/23 9:54 AM Edit / Remove / Mark Completed / Force Now

start a workflow **Post Discovery Call** immediately after an appointment is scheduled Edit / Remove / Mark Completed / Force Now

start a workflow **Post Discovery Call** 10/27/23 9:54 AM

pause workflow 0.02 hour(s) after an appointment is scheduled Edit / Remove / Mark Completed / Force Now

pause workflow 10/27/23 9:55 AM