Below is the detailed **Fonstur UPVC Sales Workflow** in CSV format, including steps, messages, integrations, and deliverables.

Workflow Steps and Messages

1. **Lead Generation Sources**:
   - Manual entry
   - Instagram and Facebook CTA buttons
   - Website inquiries and CTA buttons
   - Inbound WhatsApp marketing queries

2. **Lead Creation**:
   - Required Details:
     - Name
     - WhatsApp Number
   - Optional Details:
     - Site Address
     - Email Address

3. **Initial Outreach**:
   - Message Content:
     ```

   Welcome to Fonstur, your trusted UPVC partner. Discover quality windows and doors designed for your comfort and style. 🏠💥

   Book a free consultation with our expert technicians. They can visit your site or you can upload your dimensions online. 📐🏢

   Meet your dedicated coordinator, <Coordinator Name>. Contact them at <Coordinator Number> for personalized assistance. 📞👥

   Visit our website for more details: <Website URL>
     ```
   - Attachments:
     - Company profile – MP4 video
     - Basic catalog – PDF
   - Action Buttons:
     - Get Free Quote
     - Upload Your Dimensions
     - Request a Call from Coordinator

4. **Follow-Up and Drip Messaging**:
   - Criteria: Initiate a drip messaging sequence if no interaction with the initial message occurs within 48 hours.
   - Drip Message 1 Sequence:
     - 48 Hours: Send a graphic testimonial (JPG).
     - 96 Hours: Send a site case study (PDF).

- 144 Hours: Send a testing QA video (Video).
- 192 Hours: Send a recent testimonial video (Video).
- If no action is taken after this sequence:
  - Consider the lead inactive and remove from the CRM funnel.
- Conditional Actions:
  - If the lead interacts with any button but does not complete the process, do not restart the drip sequence. Continue from where the lead left off.
  - If the coordinator is requested to call but there is no response, follow the drip message 1 workflow without restarting.

5. **Dimensions Upload Process**:
   - Message to Client:
     ```
     Please upload your dimensions in either JPG or PDF format. This ensures compatibility and ease of use. 😊 📐 📄
     ```

   - Post-Upload Confirmation:
     ```
     Thank you for submitting your dimensions! Our team is analyzing the information. A coordinator will reach out to you soon. 😊 📐 🔍
     ```

   - Inform the coordinator immediately upon document upload, ensure CRM is updated with the data, notify the technician, and schedule the visit accordingly.

6. **Technician Visit Scheduling**:

After scheduling a visit after clicking - Get Free Quote button or coordinator schedules a visit:

- Client Message:
  ```
  Your technician visit is scheduled for [Day], [Date] at [Time]. If you need to reschedule, you can do so using the button below. The assigned technician is [Technician Name], reachable at [Technician Number]. Feel free to call them if required. 😊 🔧 📅
  ```

  - Update calendars for both the technician and the client with the scheduled visit details.

As soon as the technician uploads the dimensions:
The client would receive a WABA message saying
"Your dimensions have been recorded, we will send the complete quotation and technical specification document shortly"

7. **Document Compilation Tool**:
   - Compile static and dynamic documents into a single PDF:
     1. Company Profile (1-2 pages)
     2. Product Comparison Tech Sheet
     3. Design Sheet

4. Quotation
        5. Terms and Conditions

8. **Sending Compiled Documents**:
   - Client Message:
     ```

     📎 Attached Document: Technical Specs, Quotation, Design Sheet, Company Profile

     Hello! 👋
     Attached, you'll find everything you need:
     1. Technical Specs: Details on materials, dimensions, and more. 🛠️
     2. Quotation: Clear pricing breakdowns. 💰
     3. Design Sheet: Visualize aesthetics and functionality. 🎨
     4. Company Profile: Learn about us. 💥

     Contact our window expert to finalize. 🙌
     ```
   - Action Button:
     - Connect with Window Expert

9. **Post-Document Contact**:
   - Client Interaction Scenarios:
     - Personal Visit Request:
       ```

       Good news! We've scheduled a meeting with our technician to discuss the final
quotation and product details. The appointment is on [Date] at [Time]. If you need to
reschedule, feel free to use the button below.
       ```
       - Buttons: Call Technician, Reschedule Visit
     - Contact Request in 2-4 Days:
       - Initiate a 14-day drip message sequence with follow-ups every 48 hours.
     - Follow-Up in a Month:
       ```

       We'll follow up as promised on [Date]! 😊 You can contact us via the button below if
you want us to reach out earlier.
       ```
       - Also, send 7 drip messages in the sequence detailed below till 30 days.
       - Action Button: Connect with Window Expert
     - Clear Decline:
       - Send a gratitude message and survey form followed by a drip message in the following
sequence:
         1. Testimonial legacy video
         2. Checklist (things to consider while purchasing a fenestration system)
         3. Testing video QA1
         4. Product video
         5. Installation video
         6. Testing video QA2

7. Checklist (things to consider while purchasing a fenestration system)
 - Timing:
  - T+1 day
  - T+1+2 days
  - T+1+2+3 days
  - T+1+2+3+4 days
  - T+1+2+3+4+5 days
  - T+1+2+3+4+5+6 days
  - T+1+2+3+4+5+6+7 days
 - Gratitude Message:
  ```

  💥 Gratitude Message 💥
  Dear [Client Name],
  Thank you for considering our services! We appreciate your interest. Although you're
not ready to proceed now, we value your feedback.
  📋 Survey Form: [Survey Link]
  Your insights will help us improve. Feel free to reach out anytime if there's a future
opportunity for collaboration.
  Thank you, [Your Company Name]
  ```

 - After survey completion, send a thank you message and move the lead out of the
funnel.
 - If they fill the survey, send a small thank-you message.

10. **Drip Message 2 Sequence**:
  - Content:
   1. Testimonial legacy video
   2. Checklist (things to consider while purchasing a fenestration system)
   3. Testing video QA1
   4. Product video
   5. Installation video
   6. Testing video QA2
   7. Checklist (things to consider while purchasing a fenestration system)
  - Timing:
   - T+1 day
   - T+1+2 days
   - T+1+2+3 days
   - T+1+2+3+4 days
   - T+1+2+3+4+5 days
   - T+1+2+3+4+5+6 days
   - T+1+2+3+4+5+6+7 days
  - Actions:
   - If the customer clicks "talk to coordinator," remind the coordinator to call the person
and update their status in the CRM.
   - If after calling there is no prospect to move forward, continue the drip sequence as
planned.

- If the person declines after follow-up (after some drip messages), send the final gratitude message and survey form without repeating the already sent messages. Move the lead out of the funnel within 24 hours.
- If the follow-ups are declined in the middle, send the final gratitude message directly with the survey form.

11. **Technician Visit and Follow-Up**:
   - Upon the technician's return with dimensions, draft and upload:
   - Survey Sheet
   - PI Sheet
   - Client Message:
      ```

      Hello [Client Name] 👋,
      Regarding the order in progress:
      Estimated production timeline: [XXXX]
      Production manager (window artist) Mr. XXXX contact: [XXXX]
      Coordinator contact, Mrs XXXX: [XXXX] 📞
      Below attached:

      Signed PI

      Signed survey sheet
      Feel free to reach out if you have any queries. Thank you! 🌟
      ```

12. **Production and Order Updates**:
   - Order Delay Notification:
      ```

      Due to unforeseen circumstances, we regret to inform you that the delivery has been rescheduled to [New Date].
      ```

   - Order Ready for Dispatch:
      ```

      Your order is ready for dispatch and installation. Please schedule your preferred date and time for delivery.
      ```

   - Client and Technician Notifications:
      ```

      Your order is set for dispatch on [Date] and delivery on [Date] at [Time]. The installation manager, Mr. [Manager Name], is reachable at [Manager Number]. For any queries, request a callback with our coordinator using the button below.
      ```

   - If they reschedule, the data should flow to CRM and retrigger the WhatsApp message accordingly.

13. **Post-Installation Gratitude**:
   - Message to Client:

```

    Thank you for choosing our services! We're offering a 10% referral discount for your next
purchase when you recommend us to friends and family.
    We'd love to hear about your experience. Please

 upload a short video testimonial using the link below. Your feedback helps us improve and
grow!
    [Upload Testimonial link]
```

  - Final Thank You:
```

    We're Fonstur, always here to help you. Thank you for your trust in us.
```


14. **Document Retrieval**:
   - Clients can type "doc" or "documents" to retrieve any documents uploaded through the CRM.

Technician Messages on WhatsApp

1. **New Lead Assignment**:
```

   New lead assigned! Please review the details and schedule the necessary actions. Lead:
[Client Name], Contact: [Client Number], Requested Service: [Service Details].
```


2. **Dimension Upload Notification**:
```

   New dimensions uploaded by [Client Name]. Please review and proceed with the analysis.
Contact: [Client Number].
```


3. **Visit Scheduled Notification**:
```

   Your visit is scheduled with [Client Name] on [Day], [Date] at [Time]. Contact: [Client
Number]. Address: [Site Address]. Please confirm your availability.
```


4. **Order Dispatch Notification**:
```

   Order ready for dispatch for [Client Name] on [Date]. Delivery scheduled on [Date] at
[Time]. Contact: [Client Number]. Please prepare accordingly.
```


5. **Reschedule Notification**:
```

Visit rescheduled with [Client Name]. New date: [New Date], Time: [New Time]. Please update your schedule.
    ```

Message and Workflow CSV

```csv

| Message Content (Summary) | From | To | Step |
|---|---|---|---|
| "Initial Outreach" | "Company" | "Client" | "Lead Creation" |
| "Drip Message 1 - Graphic Testimonial" | "Company" | "Client" | "Follow-Up and Drip Messaging" |
| "Drip Message 2 - Site Case Study" | "Company" | "Client" | "Follow-Up and Drip Messaging" |
| "Dimensions Upload Request" | "Company" | "Client" | "Dimensions Upload Process" |
| "Dimension Upload Confirmation" | "Company" | "Client" | "Dimensions Upload Process" |
| "Technician Visit Scheduling" | "Company" | "Client" | "Technician Visit Scheduling" |
| "Document Compilation" | "Company" | "Client" | "Document Compilation Tool" |
| "Sending Compiled Documents" | "Company" | "Client" | "Sending Compiled Documents" |
| "Personal Visit Request" | "Company" | "Client" | "Post-Document Contact" |
| "Contact Request Follow-Up" | "Company" | "Client" | "Post-Document Contact" |
| "Clear Decline Message and Survey" | "Company" | "Client" | "Post-Document Contact" |
| "Drip Message 2 Sequence" | "Company" | "Client" | "Drip Message 2 Sequence" |
| "Technician Visit Follow-Up" | "Company" | "Client" | "Technician Visit and Follow-Up" |
| "Order Delay Notification" | "Company" | "Client" | "Production and Order Updates" |
| "Order Ready for Dispatch" | "Company" | "Client" | "Production and Order Updates" |
| "Post-Installation Gratitude" | "Company" | "Client" | "Post-Installation Gratitude" |
| "Document Retrieval" | "Company" | "Client" | "Document Retrieval" |
| "New Lead Assignment" | "Company" | "Technician" | "Technician Messages" |

| | | | |
|---|---|---|---|
| "Dimension Upload Notification" | "Company" | "Technician" | "Technician Messages" |
| "Visit Scheduled Notification" | "Company" | "Technician" | "Technician Messages" |
| "Order Dispatch Notification" | "Company" | "Technician" | "Technician Messages" |
| "Reschedule Notification" | "Company" | "Technician" | "Technician Messages" |
```

Integration CSV

```csv
| Step | Integration | Tool Option | | |
|---|---|---|---|---|
| "Lead Generation" | "Facebook | Instagram" | "Social Media Ads" | |
| "Lead Creation" | "CRM" | "Manual Entry" | | |
| "Follow-Up Messaging" | "WhatsApp" | "Messaging Platform" | | |
| "Dimensions Upload Process" | "CRM | WhatsApp" | "Upload Tool" | |
| "Technician Visit Scheduling" | "Calendar Integration" | "Google Calendar" | | |
| "Document Compilation" | "PDFMerge | Adobe Acrobat" | "Document Tool" | |
| "Sending Compiled Documents" | "WhatsApp" | "Messaging Platform" | | |
| "Technician Visit and Follow-Up" | "CRM | WhatsApp, Calendar Integration" | "Workflow Automation" | |
| "Production and Order Updates" | "CRM | WhatsApp" | "Workflow Automation" | |
| "Post-Installation Gratitude" | "WhatsApp | Referral System" | "Messaging Platform" | |
| "Document Retrieval" | "CRM | WhatsApp" | "Document Tool" | |
| "Technician Messages" | "WhatsApp | CRM" | "Messaging Platform" | |
```

Deliverables CSV

```csv
| Type | Format | Expected From Client |
| --- | --- | --- |
| "Testimonial" | "Video" | "Video testimonial from clients" |
| "Catalog" | "PDF" | "Basic catalog" |
| "Profile" | "MP4" | "Company profile video" |
| "Case Study" | "PDF" | "Site case study" |
| "QA Videos" | "Video" | "Testing QA videos" |
| "Photos" | "JPG" | "Graphic testimonials" |
| "Quotation" | "PDF" | "Detailed quotation" |
| "Design Sheet" | "PDF" | "Design specifications" |
| "Survey" | "Form Link" | "Feedback survey" |
```

END OF PROCESS

CRM SETUP FOR TIMING TO CALL - AFTER CALL DIRECT TO CRM

1. GRATITUDE MESSAGE
2. REFERRAL DISCOUNT
3. AFTER SALES CONTACT
4. TESTIMONIAL COOPERATION MESSAGE

Manual to WhatsApp

Social Media

Website

CRM

LEAD GENERATION

CRM

FINAL CHECK

DISPATCH AND INSTALLATION

1. DISPATCH DATE
2. INSTALLATION MANAGER DETAILS
3. IF ISSUE - CONTACT COORDINATOR

CTA BUTTON YES

NO

Data

NAME

WHATSAPP MOBILE

SITE ADDRESS

Email

Residential / Billing Address

Get Data from leads

"ORDER DELAYED BECAUSE OF XYZ REASON"

"ORDER READY" AND CONFIRM SCHEDULE IF YES - INPUT RESCHEDULE D

RESCHEDULE?

INTRODUCTORY MESSAGE

COMPANY PROFILE - 2 MINS VIDEO

BASIC CATALOG PDF

COORDINATOR Information II TEXT WITH CONTACT

WEBSITE LINK

INTRODUCTORY MESSAGE

Yes

CRM

NO

CALENDY

CRM

IF DELAY

CALENDY

NO COMMUNICATION

"ORDER UNDER PROGRESS, ESTIMATED TIMELINE, PRODUCTION MANAGER (WINDOW ARTIST) DETAILS" NO - CTA BUTTON

NUDGE / DRIP MESSAGES

NO

GET FREE QUOTE

CALENDY

CRITERIA

IF DOES NOT ENGAGE WITH GET FREE QUOTE FOR 48 HOURS, 48 HOURS GAP FOR EACH SUCCESSIVE DRIP MESSAGE // 24 HOURS GAP FOR CALL AND 24 HOURS FOR NUDGE MESSAGE

YES

YES

SCHEDULE TECHNICIAN VISIT OR SHARE WITH US ANY DIMENSIONS FROM THE OPTIONS GIVEN

GET FREE QUOTE

SELF (ARCHITECT OR COMPETITOR BUT DO NOT WRITE EXPLICITLY)

TECHNICIAN

CRM

SEND PI AND FINAL SURVEY SHEET

PI AND SURVEY SHEET UPLOADED IN CRM

OUT FROM FUNNEL

NO

EVERY 48 HOURS APART

GRAPHIC TESTIMONIAL JPG
SITE CASE STUDY PDF
TESTING QA - VIDEO - 1
RECENT TESTIMONIAL VIDEO

DOES MEASUREMENT AND FORMULATE SURVEY SHEET

PHYSICAL MEETING
1. SURVEY SHEET SIGNED BY CLIENT
2. FINAL PI SIGNED

CONTENT TO DESIGN

CURIOUS CASE OF

FENESTRATION INDUSTRY

GRATITUDE MESSAGE

1. ARCHITECT DATA / COMPETITOR DATA

1. SCHEDULE
2. TECHNICIAN Information

YES

7 MESSAGES

TESTIMONIALS (NOSTALGIA 2 MINS OLD CUST VIDEO)

CHECKLIST (THINGS TO CONSIDER WHILE PURCHASING FENESTRATION SYSTEM)

TESTING VIDEO QA 1
PRODUCT VIDEO
INSTALLATION VIDEO
TESTING VIDEO QA 2

CHECKLIST (THINGS TO CONSIDER WHILE PURCHASING FENESTRATION SYSTEM)

FINAL DECISION

NO

PHYSICAL MEETING

ONE COMPILED DOCUMENT

COMPANY PROFILE (1-2 PAGES)

COMPARISON CHART BETWEEN DIFF PRODUCTS OF FONSTUR - TICK MARK TABLE

DESIGN SHEET (DYNAMIC WITH CLIENT) 3 UPVC, 2 AL CUMULATIVE QUOTATIONS (DYNAMIC WITH CLIENT)

TERMS AND CONDITIONS

RESCHEDULE

TECHNICIAN VISIT

WHAT TECH GIVES?

DIMENSIONS AND HENCE FONSTUR UPLOADS IN CRM - DESIGN SHEET AND

ONLY CONTENT AT THIS STAGE AND NOT CALL

1. IF CLIENT REQUIRED 2-4 DAYS -> 7 FOLLOWUPS IN 14 DAYS
2. IF CLIENT REQUIRES NEAR A MONTH OR MORE -> 7 FOLLOWUPS IN 30 DAYS
3.

1. PDF (NEED LOGS AS TO WHEN OPEN THE PDF) - LINK OTHERWISE BUT KNOWING WHEN OPENED IS ESSENTIAL
2. COORDINATOR CALL BUTTON
3. COORDINATOR DETAILS

BY ADMIN

1. MEASUREMENTS WILL BRING (NON SIGNED)
2. QUOTATION UPLOAD ON CRM
3. DESIGN SHEET UPLOAD IN CRM

CRM DESIGN (AFTER CALL)

YES

PROSPECT?

NO

SURVEY FORM - 1 STEP

GEOMETRIC PROGRESSION (24+48+96+....) IF CLIENT SAYS NO -> 7 MESSAGES IN 14 DAYS AND **SURVEY FORM** GEOMETRIC PROGRESSION (24+48+96+....) IF CLIENT SAYS NO -> 7 MESSAGES IN 14 DAYS AND **SURVEY FORM**

CALL TO ACTION BUTTON "CONNECT WITH WINDOW EXPERT"