Cadence Automation Trigger:

- Automation initiates upon card creation
- Manually created cards will follow the Transfer Over (TO) cadence
- Product Fit leads will be based on the number of Product Upsales Opportunity (PUO):
    1. Single Product Upsell Opportunity (PUO): Follow the cadence defined for that specific product. If on the succeeding days, additional PUO will be marked, the cadence of the first PUO will still be followed.
    2. Multiple PUOs: Prioritize products based on the following order (highest to lowest):
        - 411 ConnectCAS
        - Booking Engine
        - Google Ads
        - Facebook
        - ORM (Review Management + Response Scribe)

NEW Priority (March 2025)
- Google Ads
- Facebook
- Booking Engine
- 411 ConnectCAS
- ORM (Review Management + Response Scribe)

- If the product has been sold within the 10-day cadence timeframe, the system will continue the cadence with the next product based on priority.
    - System should be able to identify the product sold and cross reference it from PUO. Then, continue the cadence for the next PUO.

Dispositions:

A. CRM Fields needs
  a. Status: change the drop-down option to:
     i. Case Closed - Sale.
     ii. No Answer / LVM - No Answer, Answering Machine, Left Voice Mail.
     iii. Call Back - Strong call back on specific date and time. Set the card to Call Back
     iv. P2P/Run Card - Strong PTP on specific date and time. Set the
     v. Soft Not Interested - Objections and stayed on call to hear pitch
     vi. Case Closed - DNC - Soft *
     vii. Case Closed - DNC - Hard
     viii. New Lead
     ix. No Pitch no price - Someone answered, but couldn't not go through the call flow /script
     x. Sent to Retention

      xi.   Language Barrier
      xii.   Sent to Escalation
      xiii.   Case Closed - Declined Sale
      xiv.   Case Closed - Not A lead

   b. Color coding
      i.   Red - Dead end for sales cadence
      ii.   Green - Sales cadence continues
      iii.   Yellow - Sales cadence branches out

B. Branch out descriptions
   a. Sent to Retention and Sent to Escalation - Stop the cadence. Set the card stage to Not Sold - Sent to Retention/Escalation.
   b. Call Back - Continue cadence with task for agent to call back on specific date and time /Task will not be created, a call log will be created. Set the card stage to Call Back.
   c. P2P/Run Card - Continue cadence based on a call log for an agent to call back on specific date and time. Set the card stage to P2P/Runcard.
   d. Case Closed - Sale (Sale Closed) - Cancel the current cadence and resume with the new segment cadence. Set the card stage to Finish - Success.
   e. Case Closed - DNC - Soft - Remove from cadence for 10 days, then place back in cadence according to segment
   f. Case Closed - DNC - Hard - Remove lead from cadence altogether
   g. New Lead - New lead assigned to agent per cadence segment
   h. No Pitch No Price - Lead to remain under assigned AE // Not an exception. Set the card stage to No Pitch No Price.
   i. Language Barrier - Re-assign lead to a Spanish-speaking AE, round-robin assigning.
   j. Case Closed Declined Sale - Place lead on resting period not assigned to AE for 60 business days.

Collaterals:

All collaterals will be sent manually. -
https://docs.google.com/spreadsheets/d/1xywZikxu83UWurZpt-iCypZBlxeVkB82_XAFfdRv3nQ/edit?gid=1360993756#gid=1360993756