

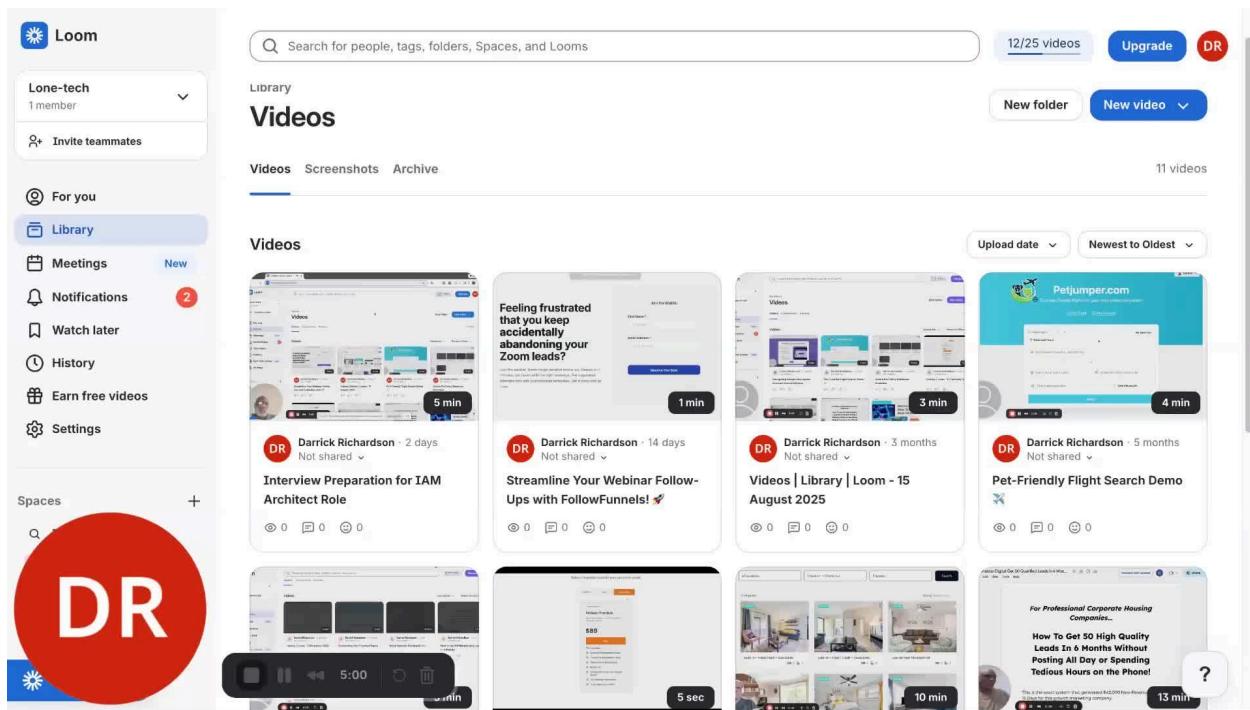
# Creating a Follow Funnel Off-Flow

## Objective

This SOP outlines the steps to set up and manage the follow funnel onboarding, including account creation, Zoom and Gmail integration, and email template management.

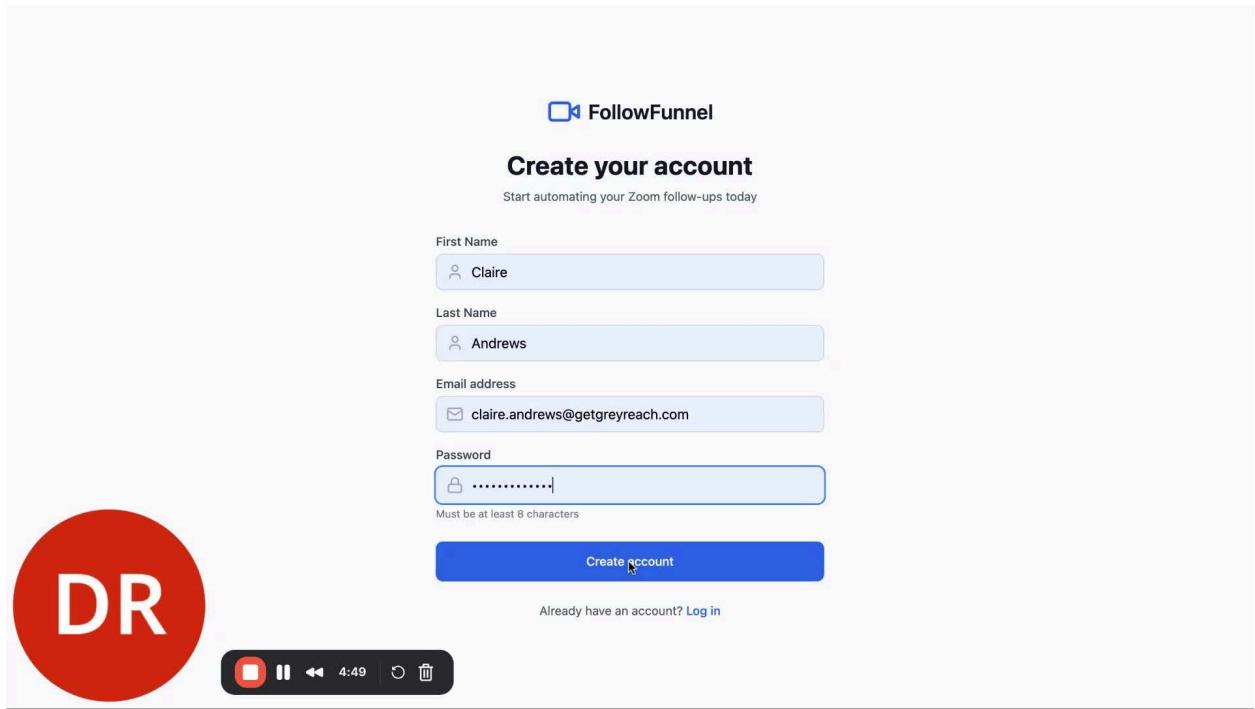
## Key Steps

### 1. Create Test Account 0:00



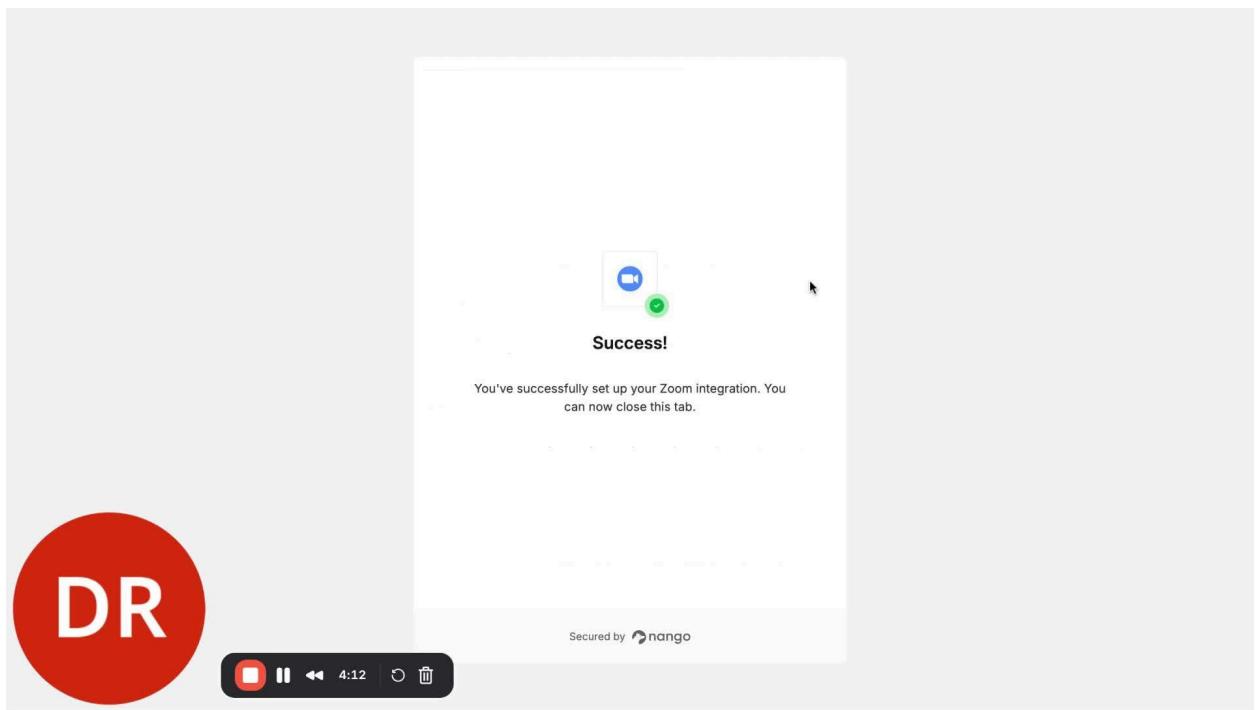
- Navigate to the account creation page.
- Click on 'Create Account' without filling in any information.
- Verify your email after receiving the confirmation.

### 2. Connect to Zoom 0:10



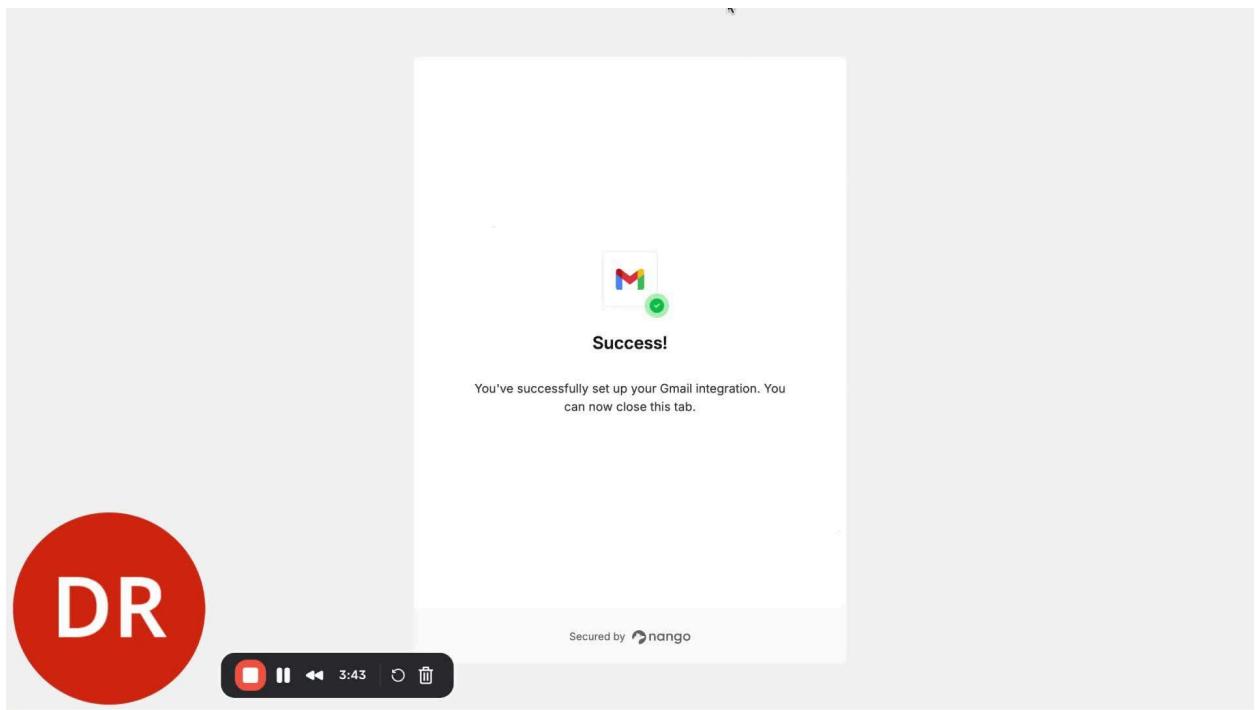
- After verifying your email, click on 'Connect to Zoom'.
- Enter your Zoom credentials when prompted.
- Review the permissions requested and click 'Allow'.

### 3. Connect to Gmail 0:44



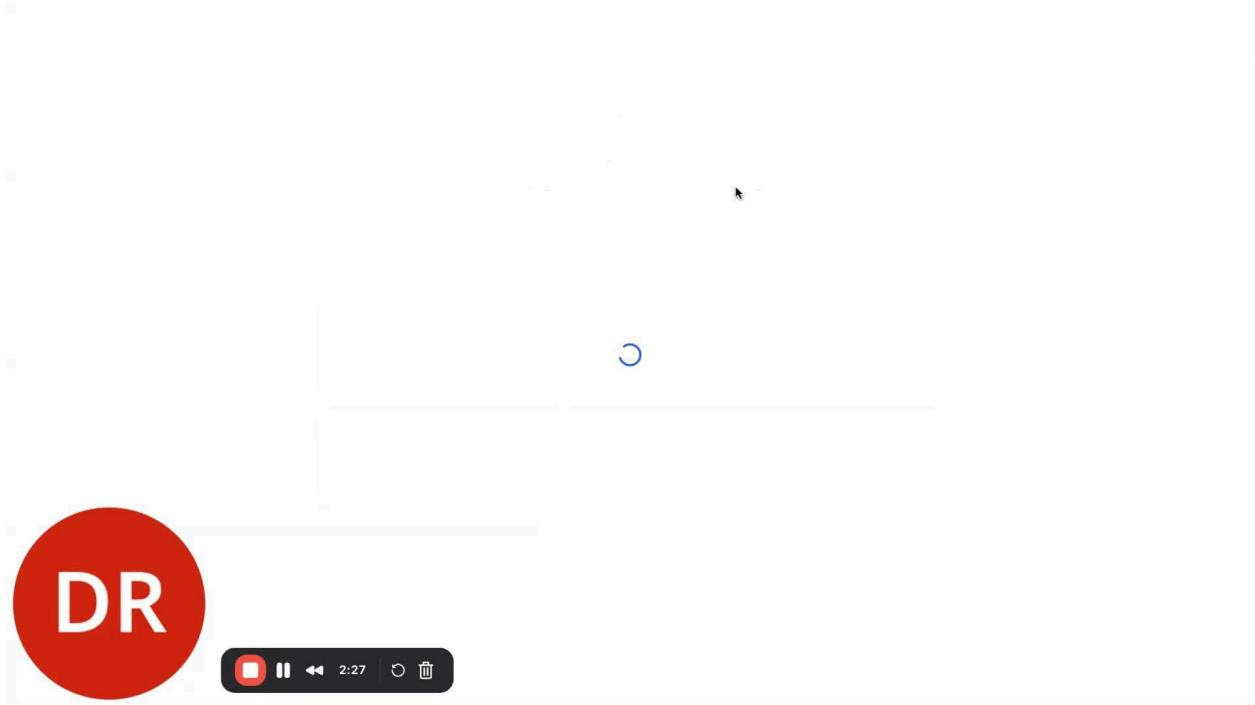
- Click on 'Connect to Gmail'.
- If you have multiple accounts, select the appropriate one and click 'Continue'.
- Confirm that you are now connected.

#### 4. Access Dashboard 1:10



- Close the connection window after confirming connections.
- If required, proceed to payment to access the dashboard.

## 5. Select Meeting Template 2:20



- Navigate to the data section to view your meetings.
- Select the desired meeting from the dropdown (e.g., 'Test Meeting Two').
- Choose the email template you want to use for participants and no-shows.

## 6. Rename Email Templates 2:46

The screenshot shows the FollowFunnel software interface. On the left, the 'Select Meeting' panel displays 'Test Meeting 2'. Below it, the 'Template Variables' section lists several placeholders: {{First Name}}, {{Last Name}}, {{Email}}, {{Company}}, {{Job Title}}, {{City}}, {{Country}}, {{Recording Link}}, and {{Meeting Title}}. The 'Send Schedule' section includes a 'Delay Amount' field set to '5' and a 'Time Unit' dropdown set to 'minutes'. At the bottom, there's a 'Send after meeting ends' button. On the right, the 'Attendees' panel has tabs for 'Attendees' and 'No Shows'. It includes fields for 'Template Name' (with placeholder 'Enter template name...'), 'Template' (with placeholder 'Select template...'), and 'Subject' (with placeholder 'Email subject...'). Below these are rich text editor tools. At the bottom right of the main window is a video player interface showing a play button, a timestamp of '1:56', and other controls. A large red circle with the letters 'DR' is overlaid on the bottom right of the interface.

- Rename the email template for no-shows as needed (e.g., 'No Shows Meeting Two').
- Click 'Save' to apply changes.

## 7. Update Template Variables 3:20

The screenshot shows a software interface for managing meetings and sending follow-up emails. On the left, a 'Select Meeting' panel displays 'Test Meeting 2'. Below it, 'Template Variables' include {{First Name}}, {{Last Name}}, {{Email}}, {{Company}}, {{Job Title}}, {{City}}, {{Country}}, {{Recording Link}}, and {{Meeting Title}}. A 'Send Schedule' section shows a delay of 5 minutes after the meeting ends. A large blue button at the bottom right of this panel says 'Create Sending Package'. On the right, a 'Template Name' field is set to 'Attendees Meeting 2 - Special Gift'. The 'Template' dropdown is set to 'Use the force luke'. The 'Subject' field contains 'Thanks for joining [Meeting Title]!'. The main content area shows an email preview with a red circular watermark containing the letters 'DR'. The email body starts with 'Hi {{first\_name}},' followed by 'Thanks for taking the time to join our meeting tonight.' and 'I really appreciated our conversation.' It continues with 'I see that you're working with {{org}}!', 'As promised, here's the recording link: {{recording\_link}}', and 'Feel free to reach out if you have any questions.' A video player interface shows a recording of length 1:19. The email ends with 'Best regards,' and 'Derrick & Lauren G.'

- Change placeholder text to actual variables (e.g., 'Meeting Title').
- Save the template again to ensure changes are recorded.

## 8. Set Email Sending Schedule 3:45

This screenshot shows the same software interface as the previous one, but with a scheduled sending time added. The 'Send Schedule' section now includes a 'Send after meeting ends' dropdown set to '1 hour later'. At the bottom right of the interface, there are 'Preview' and 'Save' buttons.

- Determine when to send emails after the meeting ends (e.g., 15 minutes).
- Adjust the time as necessary (e.g., 5 minutes, 10 minutes, etc.).
- Click 'Create Sending Package' to save the schedule.

## **Cautionary Notes**

- Ensure all credentials are entered correctly to avoid connection issues.
- Double-check email templates for accuracy before saving.

## **Tips for Efficiency**

- Use consistent naming conventions for email templates to avoid confusion.
- Regularly review and update templates based on feedback from participants.

## **Link to Loom**

<https://loom.com/share/109c7872da7a47ce9a749bbde0e96129>