

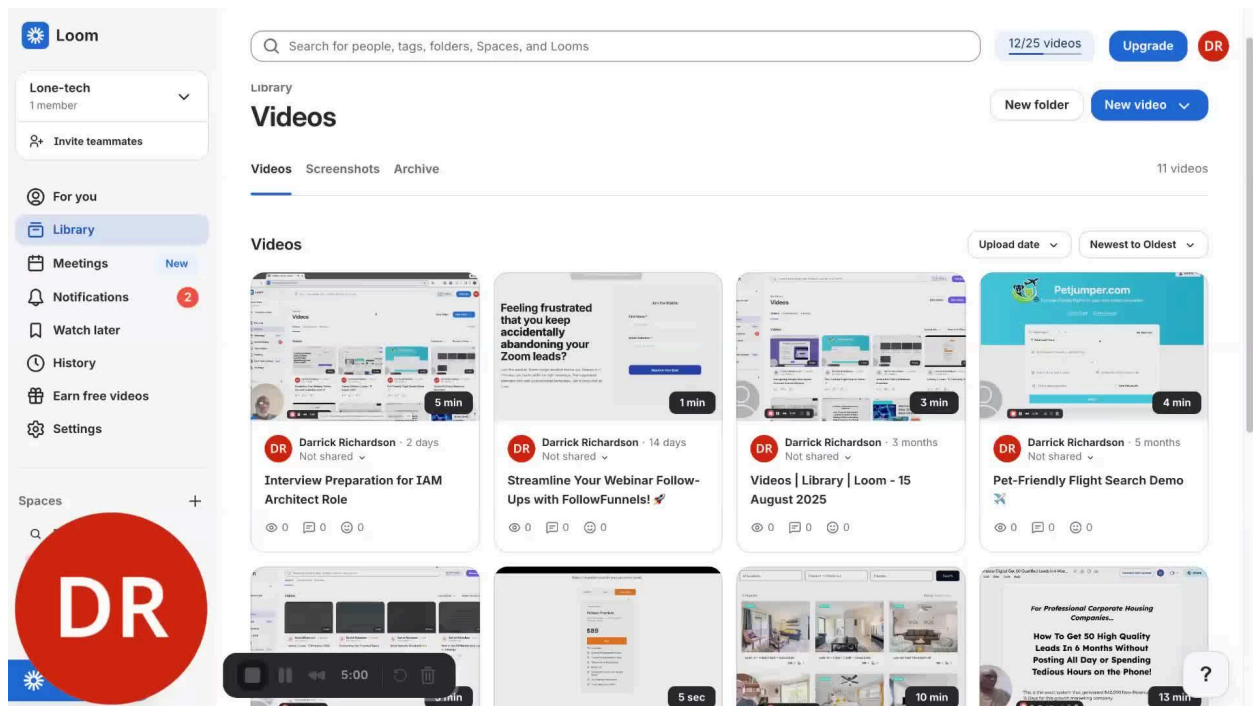
# Creating a Follow Funnel Off-Flow

## 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.

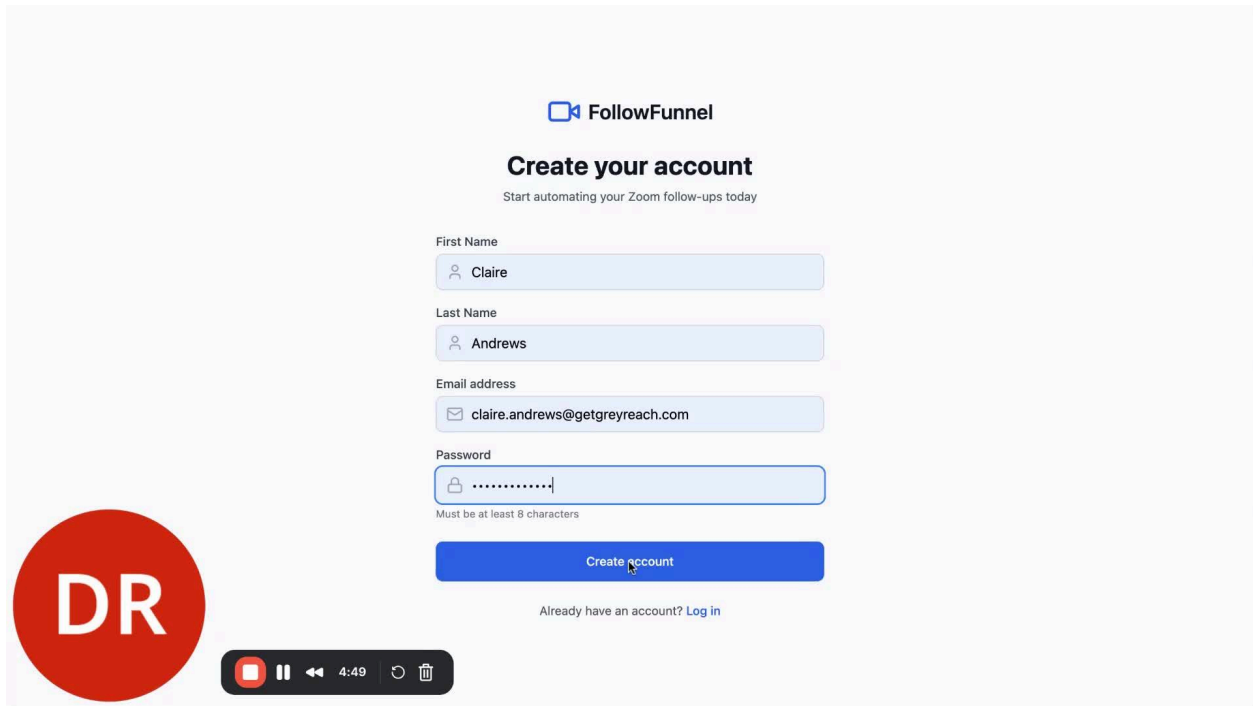
## Key Steps

### 1. Create Test Account 0:00



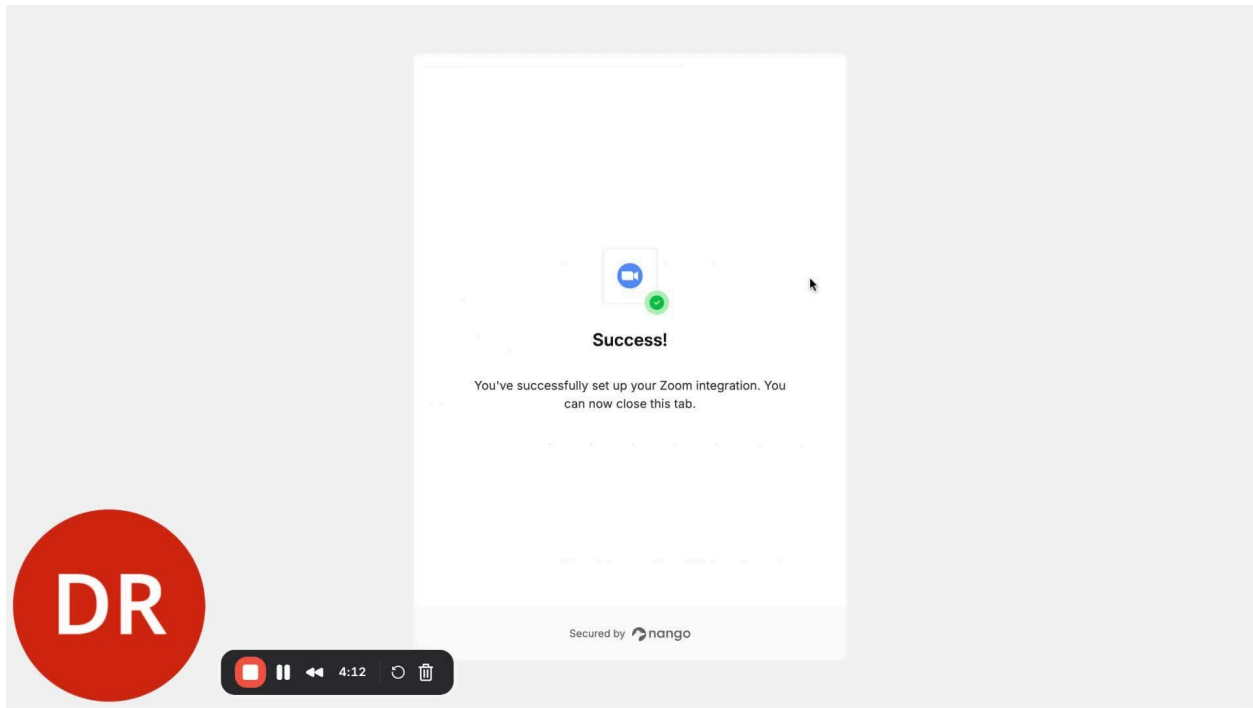
- Navigate to the account creation page.
- Click on 'Create Account' without filling in any information.
- Verify your email after receiving the confirmation.

### 2. Connect to Zoom 0:10



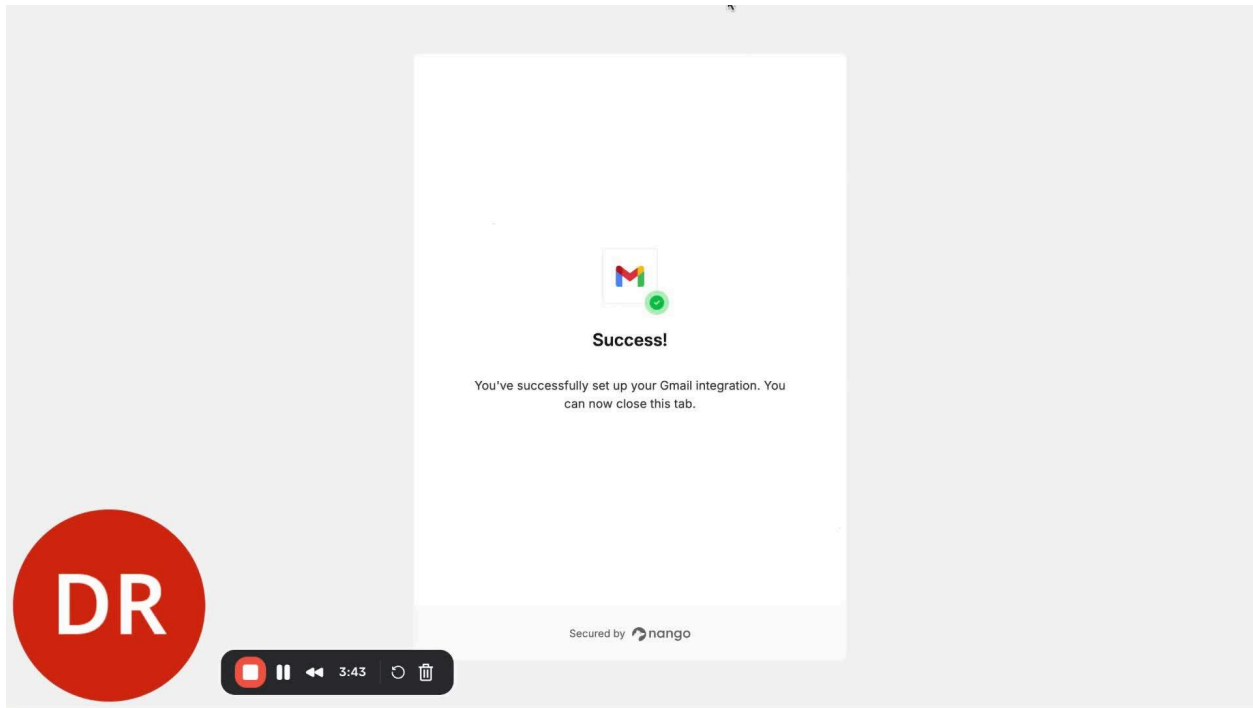
- After verifying your email, click on 'Connect to Zoom'.
- Enter your Zoom credentials when prompted.
- Review the permissions requested and click 'Allow'.

### 3. Connect to Gmail 0:44



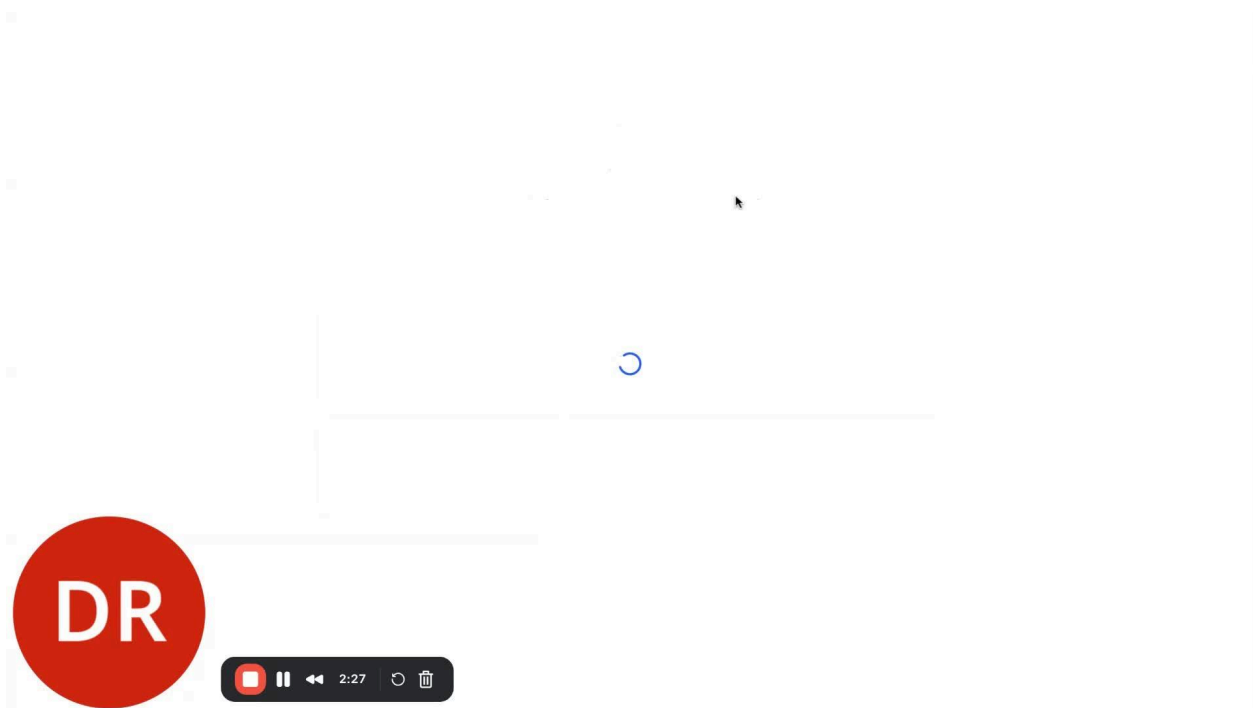
- Click on 'Connect to Gmail'.
- If you have multiple accounts, select the appropriate one and click 'Continue'.
- Confirm that you are now connected.

#### 4. Access Dashboard 1:10



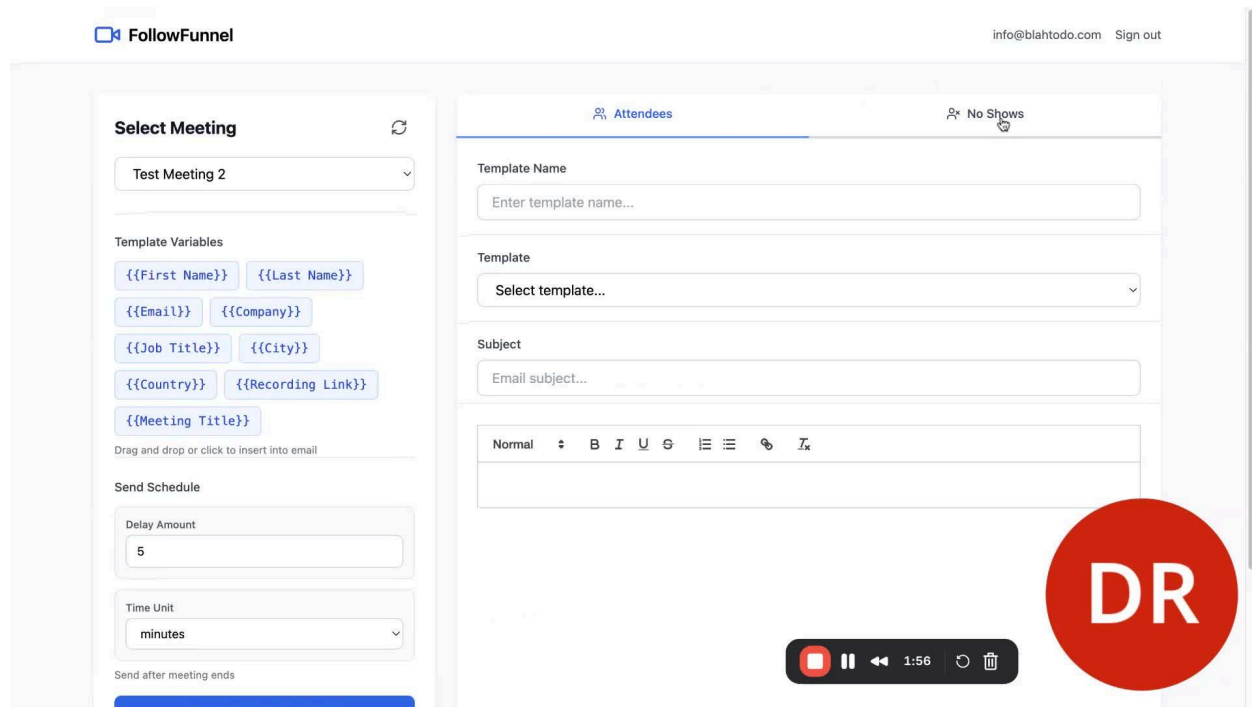
- Close the connection window after confirming connections.
- If required, proceed to payment to access the dashboard.

## 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



- 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

Select Meeting

Test Meeting 2

Template Variables

{{First Name}}

{{Last Name}}

{{Email}}

{{Company}}

{{Job Title}}

{{City}}

{{Country}}

{{Recording Link}}

{{Meeting Title}}

Drag and drop or click to insert into email

Send Schedule

Delay Amount

5

Time Unit

minutes

Send after meeting ends

Create Sending Package

Template Name

Attendees Meeting 2 - Special Gift

Template

Use the force luke

Subject

Thanks for joining [Meeting Title]!

Normal

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Hi {{first\_name}},

Thanks for taking the time to join our meeting tonight. I really appreciated our conversation.

I see th with {{org}}!

As recording link: {{recording\_link}}

Feel free to reach out if you have any questions.

Best re

Darrick & 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

Select Meeting

Test Meeting 2

Template Variables

{{First Name}}

{{Last Name}}

{{Email}}

{{Company}}

{{Job Title}}

{{City}}

{{Country}}

{{Recording Link}}

{{Meeting Title}}

Drag and drop or click to insert into email

Send Schedule

Delay Amount

5

Time Unit

minutes

Send after meeting ends

Create Sending Package

Template

Attendees Meeting 2 - Special Gift

Subject

Thanks for joining {{meeting\_title}}!

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Hi {{first\_name}},

Thanks for taking the time to join our meeting tonight. I really appreciated our conversation.

I see that you're working with {{org}}!

As promised, here's the recording link: {{recording\_link}}

Feel free to reach out if you have any questions.

Best regards,

Darrick & Lauren G.

Preview

Save

- 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>