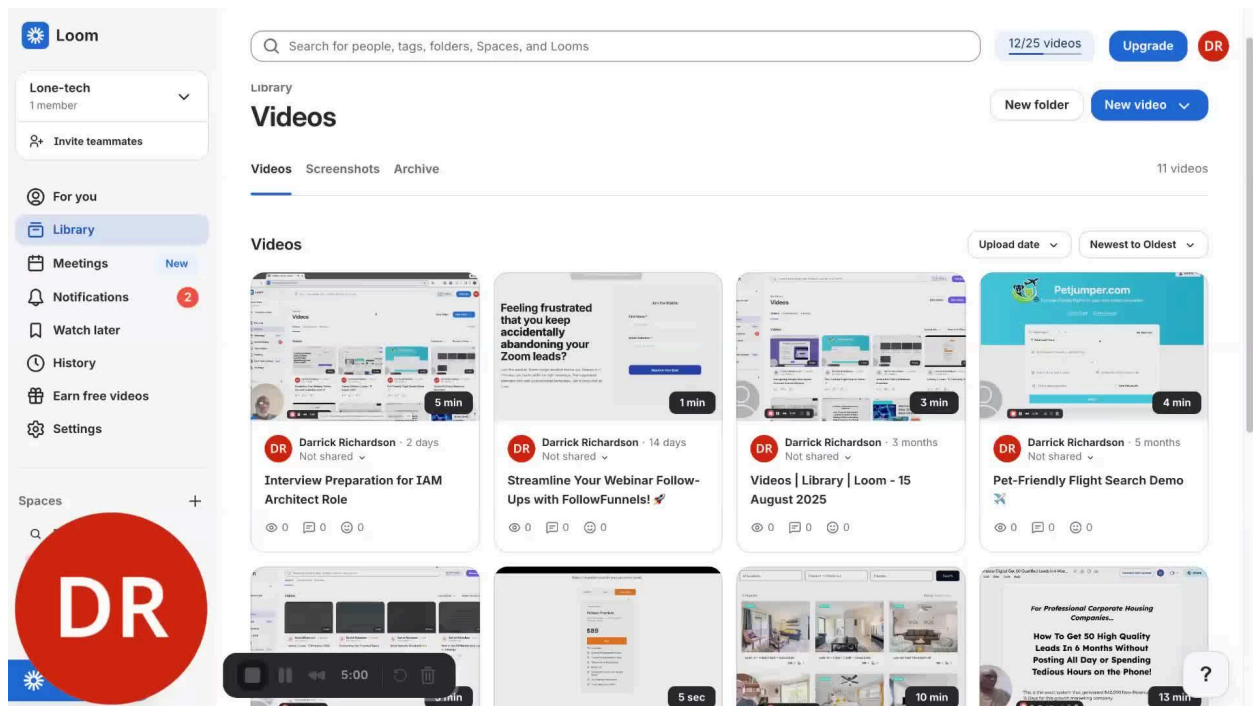# Creating a Follow Funnel Off-Flow

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.
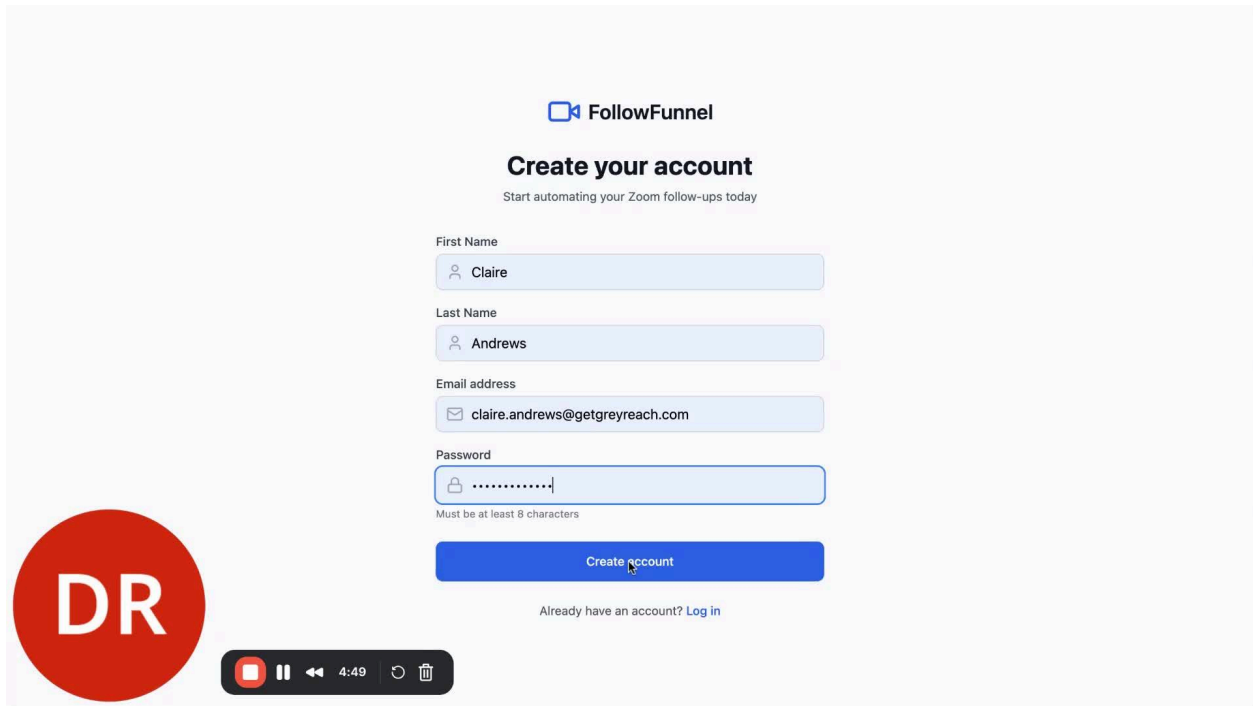
Key Steps

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.
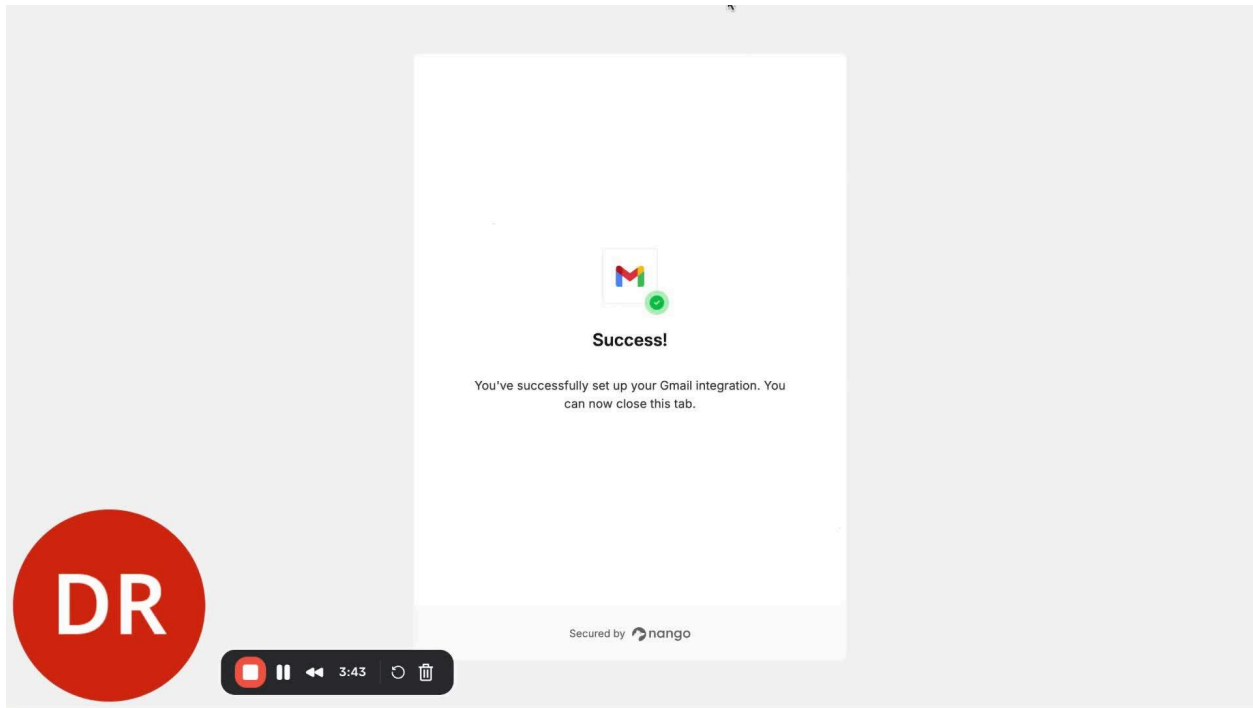
2. Connect to Zoom 0:10

- After verifying your email, click on 'Connect to Zoom'.
- Enter your Zoom credentials when prompted.
- Review the permissions requested and click 'Allow'.
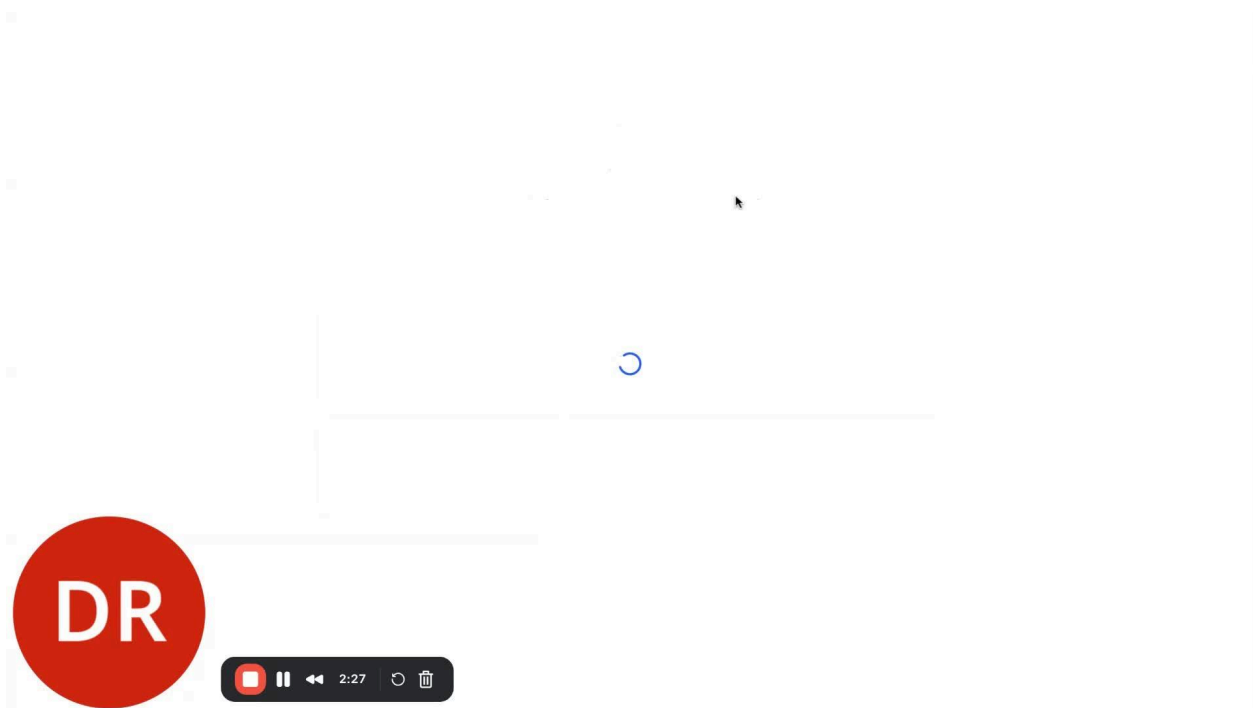
3. Connect to Gmail 0:44
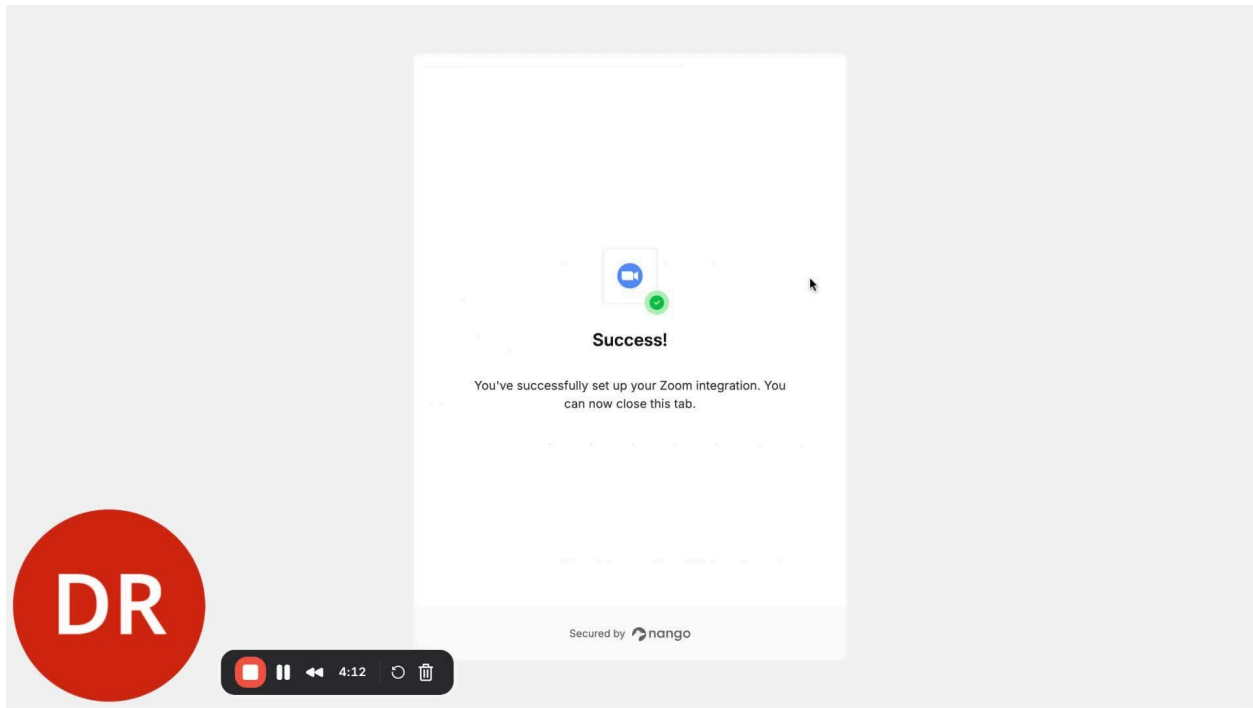
- Click on 'Connect to Gmail'.
- If you have multiple accounts, select the appropriate one and click 'Continue'.
- Confirm that you are now connected.

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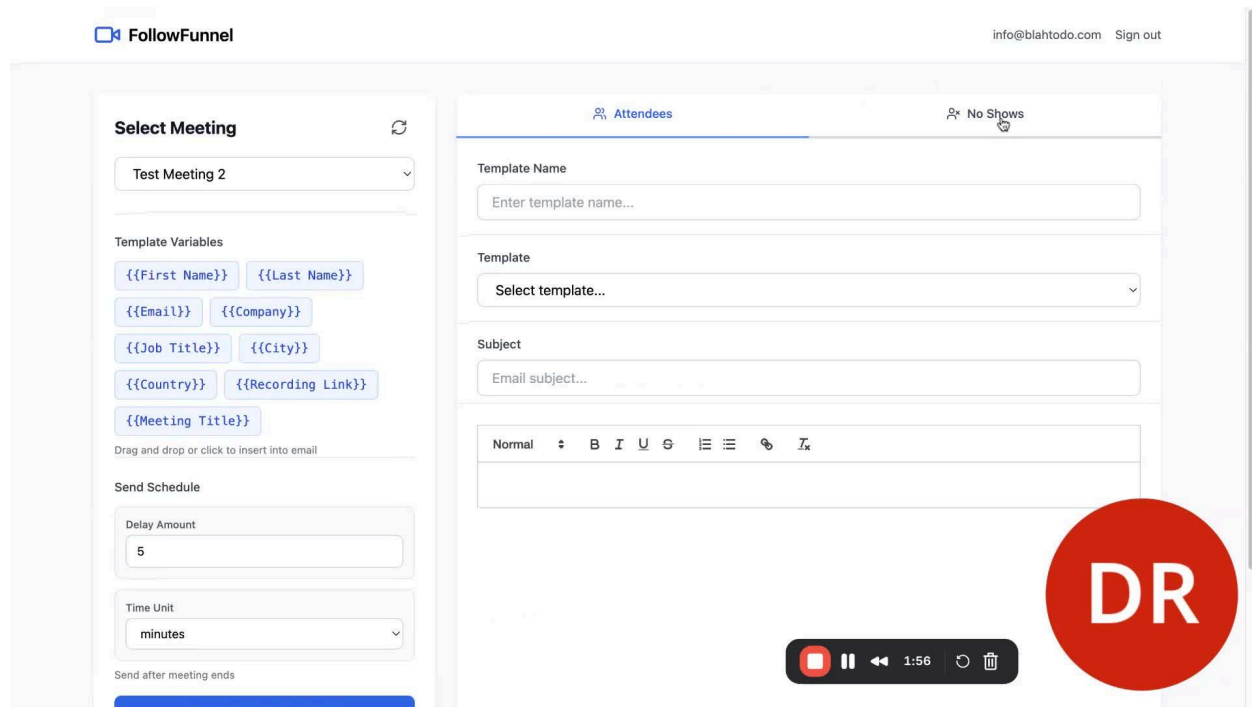
- Rename the email template for no-shows as needed (e.g., 'No Shows Meeting Two').
- Click 'Save' to apply changes.

7. Update Template Variables 3:20

- 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

- 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