

Thrive Operations Procedure Template

Thrive Operations Procedure

Purpose

Definitions

Tools needed

Procedure

Related docs/drawings

Owner

Thrive Operations Procedure

Purpose

We have people all over the world who handle one client

Process is necessary

Definitions

Define any terms or abbreviations used that will help a new hire get started.

Tools needed

- List out the tools needed in the procedure.
- Use a bulleted list.
- Let users know if they should use a shared password in the password manager, or if they should use individual accounts.

Procedure

1. Create a numbered list of the steps required to complete the procedure.
2. Keep the procedure to less than 12 steps.

3. Break a long SOP into sections or smaller interconnected SOPs.
4. For normal SOPs, break the process down into the major necessary steps.
5. Explain each step in great detail with screenshots.
6. Ensure each step complies with all internal security controls and applicable laws.
7. Use formatting and notes to add additional information that is not necessarily a step in the process, but is important to know.

Notes should be formatted as quotes, give more context, and contain warnings. The "No Entry" sign can call attention to warnings. Notes should not be longer than three lines to encourage conciseness.

Related docs/drawings

- Hyperlinks to related docs, drawings, or videos given in a bulleted list.

Advanced: Embed Google Drive, Google Slides, Google Docs, Google Sheets, PDFs, and videos by simply typing **/em** , adding the link you'd like to embed, and hitting **enter** .

Owner

The owner of the SOP is put at the bottom of every doc to ensure those who read it know who to ask questions or give suggestions to.

Outline

1. Set Up:
 - a. Questionnaire reviewed
 - b. Initial Story Built:
 - c. Funnel Scripts Opt-In Page (tf) Time
 - i. Alternative: Buzzsumo
 - ii. Alternative: ContentStudio
2. LinkedIn (TF) (SOP):
 - a. LinkedIn sales Nav Lists (tf) Time
 - b. LinkedIn SmartLinks (Content) (tf) Time
 - c. LinkedIn profile Rewrite (tf) Time
3. Content & Messaging Collection & Collaboration:
 - a. Content Collection of existing on website/internal (VA) 1 Hour
 - b. Brand Board (VA) ½ hour
 - c. Coordinate with the internal marketing team (content, Calendar, etc.)
4. Research (TF) – 3 hours max:
 - a. Competitive
 - b. Guru's
 - c. Influencers
5. Funnel Build pt 1:
 - a. Funnel build in GHL (Time) – 3 hours (Design Only)
6. Database build:
 - a. List export > enrich > analyze (VA) Tools
 - b. personalize (VA) Time
 - i. See SOP
7. Content Creation:
 - a. Written
 - i. Long Form Sales Letter - FS Tools
 - ii. Write 3-5 Emails: TFFS
 - iii. Write 1-2 LinkedIn Message TF FS
 - b. Video
 - i. 1-hour Video interview scheduled (VA) ** SOP
 - ii. VSL Content – FS

- iii. 1-hour Video interview completed + edited (Time) VA **SOP
- 8. Funnel Build pt 2:
 - a. Add in written content created in FS
- 9. Personalization Images:
 - a. 3 Images for Lemlist/Hyperise Client
- 10. Repurpose:
 - a. Content Creation AudioGram/VideoGram (VA) **SOP
- 11. VideoScribe TF Time
- 12. Tech:
 - a. Hyperise Images TF
 - b. Analytics Hooked Up - Databox TF Time
 - c. Client Hooked up on VDI
 - d. SM Content Hooked Up (Buffer, etc.) VA
 - e. Expandi SetUp (VA)
 - f. Lemlist Setup (VA)
 - g. *Domain Configuration (Email Deliverability Checklist).*
- 13. Launch:
 - a. Create message campaign
 - b. Create flow in Expandi
 - c. Lemlist - Send Email #1
 - d. Begin Expandi invitations
- 14. [Other Reference SOPs.](#)

Set Up

Header: Set Up

Purpose

Definitions

Tools needed

Procedure

Related docs/drawings

Owner

Header: Set Up

Purpose

We have people all over the world who handle one client

Process is necessary

Definitions

Acronym/ Term	Definition
Funnel Script	Is a type of copy-generating SaaS platform by marketing pros and Russell Brunson, and is a product under ClickFunnels.
Buzzsumo	Is a cloud-based platform that helps you discover the best engaging content, and outreach opportunities across social and search.
ContentStudio	Is multi-use social media management and content marketing tool that allows you to discover, compose and share the best content.

Reference: [Google.com](https://www.google.com)

Tools needed

- Buzzsumo

- ContentStudio
-
- Let users know if they should use a shared password in the password manager, or if they should use individual accounts.

Procedure

1. Questionnaire reviewed
2. Initial Story Built:
3. Funnel Scripts Opt-In Page (tf) Time
 - a. Alternative: Buzzsumo
 - b. Alternative: ContentStudio

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Related docs/drawings

- Not applicable.

Advanced: Embed Google Drive, Google Slides, Google Docs, Google Sheets, PDFs, and videos by simply typing **/em**, adding the link you'd like to embed, and hitting **enter**.

Owner

- For identification.

LinkedIn (TF) (SOP)

Header: LinkedIn (TF) (SOP)

Purpose

Definitions

Tools needed

Procedure

Related docs/drawings

Owner

Header: LinkedIn (TF) (SOP)

Purpose

We have people all over the world who handle one client

- To provide instruction in LinkedIn Sales Nav List.

Definitions

Acronym/ Term	Definition
CTA	Call to Action
SM	Social Media
Expandi	Is a cloud-based tool which is used to automate specific tasks as desired by the user. The product is for personal use such as networking in LinkedIn.
LI	LinkedIn

Reference: [Google.com](#)

Tools needed

- Expandi
- Line

- Let users know if they should use a shared password in the password manager, or if they should use individual accounts.

Procedure

Note: Click hyperlinks to go directly to the SOP Folders/ List

1. [LinkedIn sales Nav Lists \(tf\) Time](#).
2. LinkedIn SmartLinks (Content) (tf) Time. (See the "Related Docs/ Drawings" section of this page to support reference).
3. [LinkedIn profile Rewrite \(tf\) Time](#).
 - a. Also, see the link below to support item no. 3
 - [NEW Profile Changes Steps: - see description and attached images.](#)

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Related docs/drawings

- <https://www.linkedin.com/sales/smart-links>

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Owner

- *For identification.*

Content & Messaging Collection & Collaboration

Header: Content & Messaging Collection & Collaboration

Purpose

Definitions

Tools needed

Procedure

Related docs/drawings

Owner

Header: Content & Messaging Collection & Collaboration

Purpose

We have people all over the world who handle one client

Process is necessary

Definitions

Acronym/ Term	Definition
Brand Board	A brand board is an at-a-glance document containing all your brand elements- from your main logo to your color palette

Reference: google.com

Tools needed

- *List out the tools needed in the procedure.*
- *Use a bulleted list.*
- *Let users know if they should use a shared password in the password manager, or if they should use individual accounts.*

Procedure

1. Content Collection of existing on website/internal (VA) 1 Hour
2. Brand Board (VA) ½ hour. [See checklist](#).
3. Coordinate with the internal marketing team (content. Calendar, etc,)

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Related docs/drawings

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Owner

- *For identification*

Research (TF) – 3 hours max

Header: Research (TF) – 3 hours max

Purpose

Definitions

Tools needed

Procedure

Related docs/drawings

Owner

Header: Research (TF) – 3 hours max

Purpose

We have people all over the world who handle one client

Process is necessary

Definitions

Acronym/ Term	Definition

Tools needed

- *List out the tools needed in the procedure.*
- *Use a bulleted list.*
- *Let users know if they should use a shared password in the password manager, or if they should use individual accounts.*

Procedure

1. Research (TF) – 3 hours max:
 - a. Competitive
 - b. Guru's
 - c. Influencers

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Funnel Build pt. 1

Header: Funnel Build pt. 1

Purpose

Definitions

Tools needed

Procedure

Related docs/drawings

Owner

Header: Funnel Build pt. 1

Purpose

We have people all over the world who handle one client

Process is necessary

Definitions

Acronym/ Term	Definition
GHL	GoHighLevel

Tools needed

- List out the tools needed in the procedure.*
- Use a bulleted list.*
- Let users know if they should use a shared password in the password manager, or if they should use individual accounts.*

Procedure

1. Funnel Build pt 1:
 - a. Funnel build in GHL (Time) – 3 hours (Design Only)

Notes should be formatted as quotes, give more context, and contain warnings. The "No Entry" sign can call attention to warnings. Notes should not be longer than three lines to encourage conciseness.

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Database Build

Header: Database Build

Purpose

Definitions

Tools needed

Procedure

Related docs/drawings

Owner

Header: Database Build

Purpose

We have people all over the world who handle one client

Process is necessary

Definitions

Acronym/ Term	Definition
GHL	GoHighLevel
Twilio	Is a developer platform for communications.
Database build	It is the procedure used to transform your source data into a search Open SiteSearch Database Builder database .

Tools needed

- *List out the tools needed in the procedure.*
- *Use a bulleted list.*

- Let users know if they should use a shared password in the password manager, or if they should use individual accounts.

Procedure

1. Database build:
 - a. List export > enrich > analyze (VA) Tools
 - b. personalize (VA) Time
 - i. See SOP

Notes should be formatted as quotes, give more context, and contain warnings. The "No Entry" sign can call attention to warnings. Notes should not be longer than three lines to encourage conciseness.

Related docs/drawings

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Content Creation

Header: Content Creation

Purpose

Definitions

Tools needed

Procedure

Related docs/drawings

Owner

Header: Content Creation

Purpose

We have people all over the world who handle one client

Process is necessary

Definitions

Acronym/ Term	Definition
TF	Trust Flow
VSL	Video Sales Letter
CTA	Call to Action
FS	Funnel Script

Reference: google.com

Tools needed

- *List out the tools needed in the procedure.*
- *Use a bulleted list.*

- Let users know if they should use a shared password in the password manager, or if they should use individual accounts.

Procedure

1. Content Creation
 - a. Written
 - i. Long Form Sales Letter - FS Tools
 - ii. Write 3-5 Emails: TFFS
 - iii. Write 1-2 LinkedIn Message TF FS
 - b. Video
 - i. 1 hour Video interview scheduled (VA) ** SOP
 - ii. VSL Content – FS. [Click here.](#)
 - iii. 1 hour Video interview completed + edited (Time) VA **SOP

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Related docs/drawings

- <https://members.funnelscripts.com/long-form-sales-letter-script-2/>
- <https://members.funnelscripts.com/simple-vsl-sales-page-funnel-recipe/>

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Funnel Build pt. 2

Header: Funnel Build pt. 2

Purpose

Definitions

Tools needed

Procedure

Related docs/drawings

Owner

Header: Funnel Build pt. 2

Purpose

We have people all over the world who handle one client

Process is necessary

Definitions

Acronym/ Term	Definition

Tools needed

- *List out the tools needed in the procedure.*
- *Use a bulleted list.*
- *Let users know if they should use a shared password in the password manager, or if they should use individual accounts.*

Procedure

1. Funnel Build pt 2:
 - a. Add in written content created in FS

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Personalization

Header: Personalization

Purpose

Definitions

Tools needed

Procedure

Related docs/drawings

Owner

Header: Personalization

Purpose

We have people all over the world who handle one client

Process is necessary

Definitions

Acronym/ Term	Definition

Tools needed

- *List out the tools needed in the procedure.*
- *Use a bulleted list.*

- Let users know if they should use a shared password in the password manager, or if they should use individual accounts.

Procedure

1. Personalization Images:
 - a. 3 Images for Lemlist/Hyperise Client

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Repurpose

Header: Repurpose

Purpose

Definitions

Tools needed

Procedure

Related docs/drawings

Owner

Header: Repurpose

Purpose

We have people all over the world who handle one client

Process is necessary

Definitions

Acronym/ Term	Definition

Tools needed

- *List out the tools needed in the procedure.*
- *Use a bulleted list.*
- *Let users know if they should use a shared password in the password manager, or if they should use individual accounts.*

Procedure

1. Repurpose:
 - a. Content Creation AudioGram/VideoGram (VA) **SOP

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Related docs/drawings

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Videoscribe TF Time

Header: Videoscribe TF Time

Purpose

Definitions

Tools needed

Procedure

Related docs/drawings

Owner

Header: Videoscribe TF Time

Purpose

We have people all over the world who handle one client

Process is necessary

Definitions

Acronym/ Term	Definition

Tools needed

- *List out the tools needed in the procedure.*
- *Use a bulleted list.*
- *Let users know if they should use a shared password in the password manager, or if they should use individual accounts.*

Procedure

1. VideoScribe TF Time

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Related docs/drawings

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Tech

Header: Tech

Purpose

Definitions

Tools needed

Procedure

Related docs/drawings

Owner

Header: Tech

Purpose

We have people all over the world who handle one client

- This procedure provides guidelines on Hyperise, Expandi, and Lemlist.

Definitions

Acronym/ Term	Definition
Lemlist	The first emails outreach platform that allows you to automatically generate personalized images and videos. Kickstart client relationships by making cold emails highly personalized and human from day one.
Expandi	Is a cloud platform that is designed to make automated outreach safer with random delays, message frequencies, message limits (and much more).
Hyperise	Is a personalization tool for marketers that they can leverage to create dynamic images

Reference: [Google.com](https://www.google.com)

Tools needed

- *List out the tools needed in the procedure.*

- Use a bulleted list.
- Let users know if they should use a shared password in the password manager, or if they should use individual accounts.

Procedure

Note: Click the hyperlink to go directly to the SOP Folder

1. [Hyperise Images TF](#).
2. Analytics Hooked Up - Databox TF Time
3. Client Hooked up on VDI
4. SM Content Hooked Up (Buffer, etc.) VA
5. [Expandi SetUp \(VA\)](#).
6. [Lemlist Setup \(VA\)](#).

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Related docs/drawings

- <https://expandi.io/live-demo/>
- <https://blog.lemlist.com/email-deliverability-checklist/>
-

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Launch

Header: Launch

Purpose

Definitions

Tools needed

Procedure

Related docs/drawings

Owner

Header: Launch

Purpose

We have people all over the world who handle one client

Process is necessary

Definitions

Acronym/ Terms	Definition

Tools needed

- List out the tools needed in the procedure.*
- Use a bulleted list.*
- Let users know if they should use a shared password in the password manager, or if they should use individual accounts.*

Procedure

1. Create message campaign

2. Create flow in Expandi
3. Lemlist - Send Email #1
4. Begin Expandi invitations

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Related docs/drawings

- *Hyperlinks to related docs, drawings, or videos given in a bulleted list.*

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Other Reference SOPs

Header: Other Reference SOPs

Purpose

Definitions

Tools needed

Procedure

Related docs/drawings

Owner

Header: Other Reference SOPs

Purpose

This procedure serves as a reference to some important SOPs. Refer to the "Procedure" section of this document to find out the information provided

Definitions

Refer to the linkages on the "Procedure" part of this document.

Tools needed

- List out the tools needed in the procedure.
- Use a bulleted list.
- Let users know if they should use a shared password in the password manager, or if they should use individual accounts.

Procedure

- [Domain Configuration - Email Deliverability Checklist](#).
- [Target Start-ups Who are Hiring Right Now](#)

- [Target Big Companies That are Hiring](#)
- [SOP Accelerator Intensive](#)

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Related docs/drawings

- Refer to the linkages on the "Procedure" part of this document.

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Domain Configuration (Email deliverability checklist)

Header: Domain Configuration (Email deliverability checklist)

Purpose

Definitions

Tools needed

Procedure

Related docs/drawings

Owner

Header: Domain Configuration (Email deliverability checklist)

Purpose

To maximize deliverability and make sure cold emails land on top of anyone's inbox... consistently

Definitions

Acronym/ Term	Definition
SPF	<ul style="list-style-type: none">• Sender Policy Framework.• It is an email authentication system designed to prevent email spoofing. It works by verifying that an email message is sent from an authorized IP address.
DKIM	<ul style="list-style-type: none">• DomainKeys Identified Mail.• Is a technical standard that helps protect email senders and receivers from spam, spoofing, and phishing.• It is a form of email authentication that allows an organization to take responsibility for a message in a way that can be validated by the recipient
DMARC	<ul style="list-style-type: none">• Domain-based Message Authentication, Reporting, and Conformance

	<ul style="list-style-type: none"> It is a technical standard that helps protect email senders and receivers from spam, spoofing, and phishing.
Lemwarm	<ul style="list-style-type: none"> Lemwarm will send emails to other lemlisters by using your account with some uniquely generated content. ... This process aims to imitate human behavior to give the impression to email providers that you manually send your emails.
B2B	Business-to-business (B2B), also called B-to-B, is a form of transaction between businesses, such as one involving a manufacturer and who sells to a wholesaler and a retailer

Reference: [Google.com](https://www.google.com)

Tools needed

- List out the tools needed in the procedure.*
- Use a bulleted list.*
- Let users know if they should use a shared password in the password manager, or if they should use individual accounts.*

Procedure

Link: [SOP - Domain Configuration \(Email deliverability checklist\)](#)

1. Audit and the Current Situation
2. Technical Configuration
3. Warm of Existing Accounts
4. Become Obsessed with Email List Quality and Hygiene
5. Send high-quality email content
6. Maintain a good reputation
7. Bottom Line

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Related docs/drawings

- <https://blog.lemlist.com/email-deliverability-checklist/>

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Target Start-ups Who are Hiring Right Now

Heading: Target Start-ups Who are Hiring Right Now

Purpose

Definitions

Tools needed

Procedure

Related docs/drawings

Owner

Heading: Target Start-ups Who are Hiring Right Now

Purpose

We have people all over the world who handle one client

- This growth hack will help recruiters/ outsourcing business/ marketing agencies.

Definitions

Acronym/ Terms	Definition
Instant Data Scraper	Is an automated data extraction tool for any website. It uses AI which data is most relevant on a HTML page and allows saving file (XLS, XLSX, CSV).

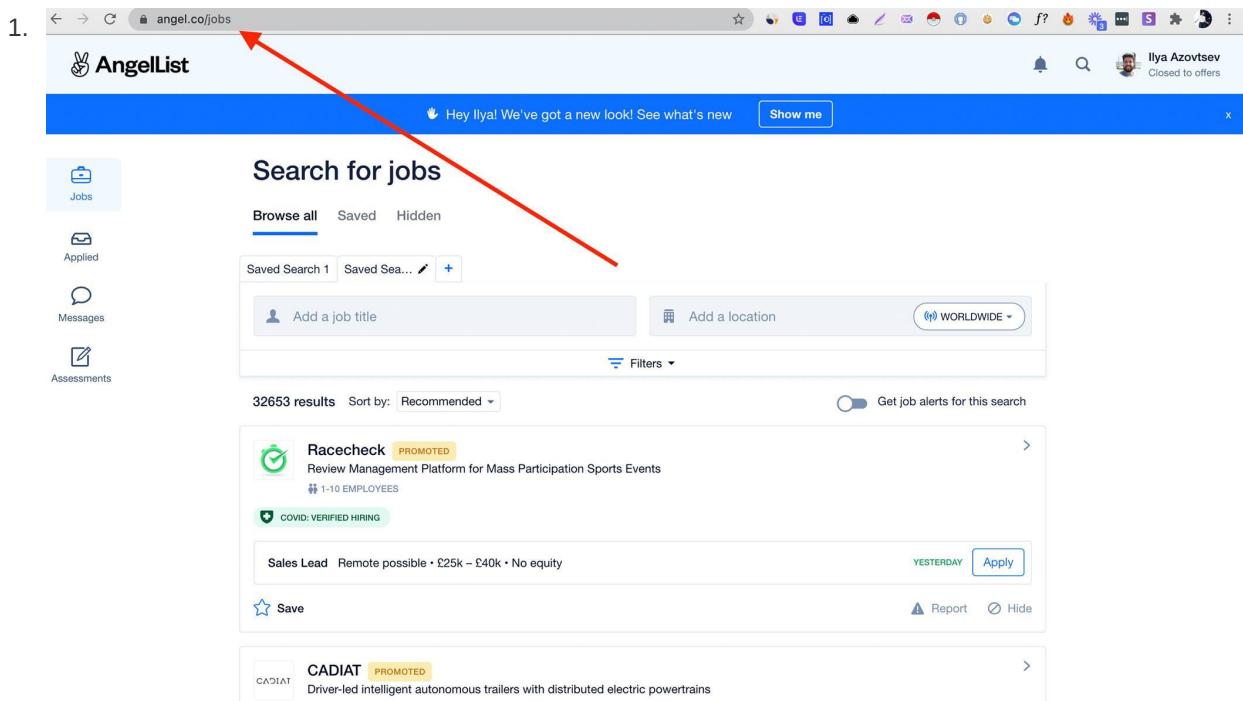
Tools needed

- Data Scraper ([Instant Data Scraper](#)).
-
- *Let users know if they should use a shared password in the password manager, or if they should use individual accounts.*

Procedure

Link: [SOP - Target Start-ups Who are Hiring Right Now](#)

1. Go to [[Angel.co](http://angel.co)](<http://angel.co>)



2. Find start-ups who are looking for {position} right now (for example, Digital Marketing Specialist)

Search for jobs

Browse all Saved Hidden

Saved Search 1 Saved Sea...

Add a location

2813 results Sort by: Recommended Get job alerts for this search

Flowplayer PROMOTED
Online video that works
11-50 EMPLOYEES

COVID: VERIFIED HIRING

Freelance Technology Copywriter Remote possible • \$25k – \$35k 2 WEEKS AGO

Report Hide

3. Put filters (like “remote-friendly”, budgets and so on)

Digital Marketing Manager

No filters selected

Compensation

Salary: \$0k - \$200k+

All currencies

Areas of Interest

Skills + Type to search

POPULAR Python + React.js + Node.js + Java +

Markets + Type to search

POPULAR Healthcare + E-Commerce + Education + Enterprise Software +

A red arrow points from the 'Areas of Interest' section to the 'Remote' option in the dropdown menu.

4. Scrape the list with Instant Data Scraper [<https://chrome.google.com/.../ofaokhiedipchpaobibbnahnd...>]

@Tracey Fudge

Try another table

Locate "Next" button

Infinite scroll

Min delay 1 sec

Max delay 20 sec

Download data or locate "Next" to crawl multiple pages

style_component_1c6JC href	style_avatar_2lVF7 src	style_name_v6k3	style_subheader_s7IGM	style_halo_fontSizeMap_size-2	style_component_1
https://angel.co/company/marketerhire-1	https://photos.angel.co/startups/7893723-8a5	MarketerHire	MarketerHire's mission is to make expert market 11-50 employees		https://angel.co/company/m
https://angel.co/company/marketerhire-1	https://photos.angel.co/startups/7893723-8a5	MarketerHire	MarketerHire's mission is to make expert market 11-50 employees		https://angel.co/company/m
https://angel.co/company/square-32-consulting	https://photos.angel.co/startups/5909181-28C	Square 32 Consulting	Creative Education and Marketing Consultancy 1-10 employees		https://angel.co/company/s
https://angel.co/company/atreum-technologies	https://photos.angel.co/startups/8204950-ab5	Atreum Technologies	Indoor Agriculture LED Lighting and Control System 1-10 employees		https://angel.co/company/a
https://angel.co/company/rebecca-page-2	https://photos.angel.co/startups/8212277-15t	Rebecca Page	We are a disruptive, global B2C start-up that creates 11-50 employees		https://angel.co/company/r
https://angel.co/company/llama-lead-gen-1	https://photos.angel.co/startups/8193645-37c	Llama Lead Gen	It's time to generate leads for your business 1-10 employees		https://angel.co/company/l
https://angel.co/company/prire	https://photos.angel.co/startups/8140456-74d	Prike	Digital Advisory, Consulting and Execution Services 1-10 employees		https://angel.co/company/p
https://angel.co/company/concpt	https://photos.angel.co/startups/6516798-8a6	Concpt	Connecting you Live to learn from world's best 1-10 employees		https://angel.co/company/c
https://angel.co/company/remote-roofing-2	https://photos.angel.co/startups/7550933-eef	Remote Roofing	Remote Roofing leverages computer vision to find 11-50 employees		https://angel.co/company/r
https://angel.co/company/hipcamp	https://photos.angel.co/startups/215222-9e64	Hipcamp	Book unique camping experiences on over 300 11-50 employees		https://angel.co/company/h
https://angel.co/company/labelbox	https://photos.angel.co/startups/5434911-bcf	Labelbox	The leading training data platform for data labeling 11-50 employees		https://angel.co/company/l
https://angel.co/company/alcanize-1	https://photos.angel.co/startups/6408400-e24	Alcanize	Alcanize automates answering questions for you 11-50 employees		https://angel.co/company/a

Pages scraped: 1
Rows collected: 12
Rows from last page: 12
Working time: 0s

Help/Feedback

5. Put the list of domains in find that leads.

indThatLead

Verify Social Send Emails Prospect Local Businesses

Search

Enter full name... Enter a Domain or Company Name...

All Personal

Bulk Uploads You don't have any bulk list

How do you want to search this CSV?

Lead Search Fields needed: First name, Last name and domain or company name

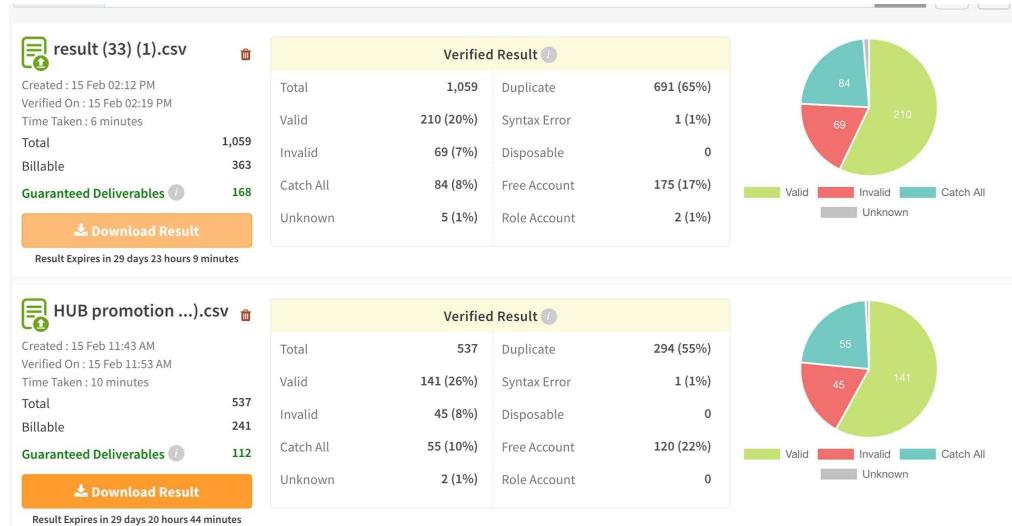
Domain Search Fields needed: Domain or company name

Continue

Bulk Upload

6. Filter results by title (so you can reach out to relevant people)

7. Verify email addresses [<https://blog.lemlist.com/how-to-check-if-an-email-is-valid/>]



8. Send your campaign (see sample image).

I've found {{companyName}} on [Angel.co](#) and found that you're looking for {{position}} right now.

Am I right, {{firstName}}?

I've checked the [job offer](#) and what you're guys doing, pretty impressive 🔥



Thought, that we probably can help you with your marketing activities. We already helped start-ups like {{Client1}}, {{Client2}} and {{Clients3}} with boosting their SEO rankings and paid ads.

Usually, we increase traffic and leads by 30-40% in the first 2-3 months 🔥

If you think it may be interesting to you, let's have a call? (what about this week, please pick the time in [calendaly](#))

Notes should be formatted as quotes, give more context, and contain warnings. The "No Entry" sign can call attention to warnings. Notes should not be longer than three lines to encourage conciseness.

Related docs/drawings

- [angel.co](#)
 - [Remote Job and Startup Job Search | AngelList Talent](#)
 - Apply privately to 130,000+ remote jobs and startup jobs near you with one application.
See salary and equity upfront.
- [chrome.google.com](#)
 - [Instant Data Scraper](#)
 - Instant Data Scraper extracts data from web pages and exports it as Excel or CSV files
- [High-Performing B2B Outbound Strategies](#)
 - [How to check if an email is valid \[Test 7 email verification tools\]](#)
 - How to avoid SPAM folders with email verification. We'll test email validation tools so you can verify email address without sending an email!

Advanced: Embed Google Drive, Google Slides, Google Docs, Google Sheets, PDFs, and videos by simply typing `/em`, adding the link you'd like to embed, and hitting `enter`.

Owner

The owner of the SOP is put at the bottom of every doc to ensure those who read it know who to ask questions or give suggestions to.

Target Big Companies That are Hiring

Heading: Target Big Companies That are Hiring

Purpose

Definitions

Tools needed

Procedure

Related docs/drawings

Owner

Heading: Target Big Companies That are Hiring

Purpose

We have people all over the world who handle one client

- This hack is for those who target big clients (from 500+)
- You can reach out to specific people from companies that are looking for {title} right now. For example, this is an example of companies who are looking for Salespeople:

Definitions

Acronym/ Term	Definition
LeadFuze	Is a lead generation software that leverages AI to discover specific roles and industries. Apart from basic information, the solution provides depth data such as verified emails, contact numbers, social accounts, and more.

Reference: [Google.com](https://www.google.com)

Tools needed

- LeadFuze
- *Let users know if they should use a shared password in the password manager, or if they should use individual accounts.*

Procedure

Note: Follow this link: [Target Big Companies That are Hiring](#)

1. Go to email databases (in this case it's LeadFuze).
2. Filter companies by criteria.

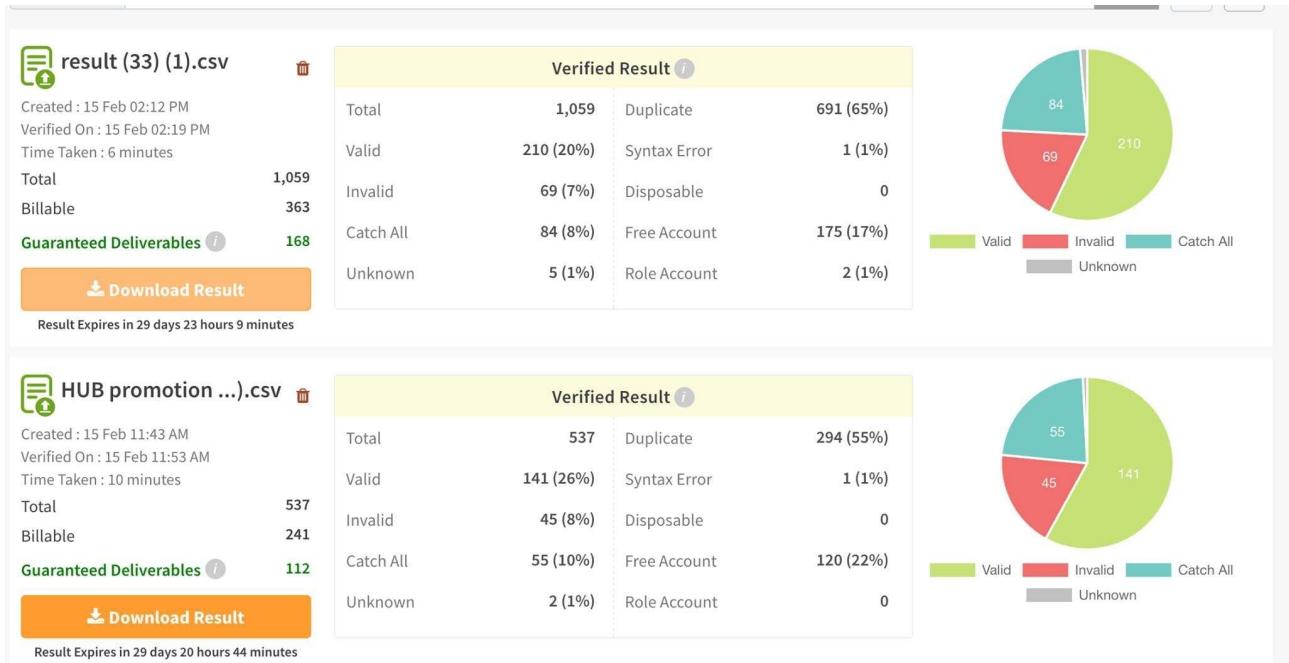
INDUSTRY Enter the industry (or industries) for your targeted leads <div style="border: 1px solid #ccc; padding: 2px; margin-top: 5px;">Computer Software & Internet Technology X</div>	LOCATION City/State/Metro/Country/Continent/Region <div style="border: 1px solid #ccc; padding: 2px; margin-top: 5px;"></div>
EMPLOYEE SIZE Choose employee size range(s) <div style="border: 1px solid #ccc; padding: 2px; margin-top: 5px;">Group: Mid Size Business X</div>	MONTHLY ADWORDS BUDGET Enter monthly adwords budget <div style="border: 1px solid #ccc; padding: 2px; margin-top: 5px;"></div>
TECHNOLOGIES BEING USED Choose technologies <div style="border: 1px solid #ccc; padding: 2px; margin-top: 5px;">Hires X</div>	HIRING FOR Input job titles to find those hiring <div style="border: 1px solid #ccc; padding: 2px; margin-top: 5px;">Category: Sales X</div>
NEWS Select categories of news events <div style="border: 1px solid #ccc; padding: 2px; margin-top: 5px;"></div>	YEAR FOUNDED From None To None <div style="border: 1px solid #ccc; padding: 2px; margin-top: 5px;"></div>

3. Filter people by criteria.

Lead Search > Market Based > Search Results

The screenshot shows a search interface for 'Market Based Demo'. On the left, there's a 'SEARCH CRITERIA' section with dropdowns for 'PERSON', 'COMPANY', and 'CONTACT INFO'. Below this is a 'SEARCH RESULT' table with 31 results found. The first seven rows of the table are highlighted with a red box. To the right of the table are several 'ADD TO LIST' buttons and a 'WATCH VIDEO' button. On the far right, there are sections for 'FILTERS' (with options like 'REQUIRE EMAIL?', 'Double Verified Emails Only', etc.), 'MAX RESULTS PER COMPANY' (set to 'No Limit'), and 'JOB STATUS' (set to 'Currently Employed').

4. Choose “have email addresses” and “double-verified”
5. Export the list.
6. Verify email addresses [<https://blog.lemlist.com/how-to-check-if-an-email-is-valid/>]



7. Send email campaign (see sample image below).

The screenshot shows an email template interface. At the top, there's a subject line placeholder: '(?) Subject saw you're scaling your sales team'. To the right are icons for a smiley face and a person. The main content area starts with a greeting: '{{firstName}},'. Below it is a message: 'I just saw that you are looking for {{position}}.' Another message follows: 'That is really impressive that you at {{companyName}} can scale your team during this hard period.' A third message is: 'As a founder myself, I know that it's always hard to scale the team (all processes, reports and so on), so I thought our solution can help you with onboarding new team members.' The final message is: 'Let me know if you're ok to check it out (it also helped {{company1}} and {{company2}} to onboard dozens of new sales reps smoozly.)'. To the right of this message is a small green circular icon with a white smiley face.

8. If you want to get more hack like this comment below “more growth hacks for lemfamily ”

Notes should be formatted as quotes, give more context, and contain warnings. The "No Entry" sign can call attention to warnings. Notes should not be longer than three lines to encourage conciseness.

Related docs/drawings

- [<https://blog.lemlist.com/how-to-check-if-an-email-is-valid/>]

High-Performing B2B Outbound Strategies

[How to check if an email is valid \[Test 7 email verification tools\]](#)

How to avoid SPAM folders with email verification. We'll test email validation tools so you can verify email address without sending email!

Written by

Ilya Azovtsev

Filed under

Email Outreach Guides

Nov 3rd, 2020 (45 kB)

Advanced: Embed Google Drive, Google Slides, Google Docs, Google Sheets, PDFs, and videos by simply typing `/em`, adding the link you'd like to embed, and hitting `enter`.

Owner

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SOP Accelerator Intensive

Header: SOP Accelerator Intensive

Purpose

Definitions

Tools needed

Procedure

Related docs/drawings

Owner

Header: SOP Accelerator Intensive

Purpose

It serves to guide in accelerator intensive

Definitions

Acronym/ Term	Definition
Otter.ai	Otter is where conversations live. Generate rich notes for meetings, integrations, lectures, and other important voice conversations with Otter , your AI-powered note-taking assistant.
Zoom	Is a cloud-based video conferencing service you can use to virtually meet others - either by video or audio-only or both, all while conducting live c

Tools needed

- [Otter.ai](#)
- Zoom
-

- Let users know if they should use a shared password in the password manager, or if they should use individual accounts.

Procedure

Note: Follow this link to [SOP - Accelerator Intensive](#)

1. Send Questions In Advance - see link (<https://thrive.wispform.com/7e1fd05b>)
2. Schedule 1st Call - Client
 - a. Do on our Zoom
 - b. Record and send to [Otter.ai](#)
3. Schedule 2nd Call - Client
4. Schedule Presentation Call
5. Internal Create the Reports
6. Schedule Internal Call

Notes should be formatted as quotes, give more context, and contain warnings. The "No Entry" sign can call attention to warnings. Notes should not be longer than three lines to encourage conciseness.

Related docs/drawings

- <https://thrive.wispform.com/7e1fd05b>

Advanced: Embed Google Drive, Google Slides, Google Docs, Google Sheets, PDFs, and videos by simply typing **/em**, adding the link you'd like to embed, and hitting **enter**.

Owner

- For identification

Expandi Management Procedure

Header: Expandi Management Procedure

Purpose

Definitions

Tools needed

Procedure

A. Expandi Management + Reporting.

B. Expandi Set Up

Related docs/drawings

Owner

Header: Expandi Management Procedure

Purpose

The purpose of this procedure is to provide guidelines for using [Expandi.io](#).

Definitions

Define any terms or abbreviations used that will help a new hire get started.

Tools needed

- Access to [expandi.io](#)

Procedure

A. Expandi Management + Reporting.

1. Daily Message Check Export, Notification + Reconciliation.
2. Weekly Reporting Instruction - Done Weekly on Thursdays. [Click here](#).
3. Check for NEW messages in Expandi. [Click here](#).
4. After Warm Up (30 days or so), set limits.
 - a. Connection Request Range Limit = 25-33
 - b. Message Range Limit = 30 - 40
5. Workflow - LinkedIn, Calendly + Lemlist. Refer to this link: <https://expandi.io/blog/linkedin-reverse-webhooks-inbound-leads/>
6. Hyperise - Send hyper-personalized campaign images. Refer to this link: <https://expandi.io/blog/advanced-linkedin-dynamic-personalization/>. [Click here](#) for detailed instructions.
7. Create OmniChannel Workflow. Refer to this link: <https://expandi.io/blog/the-ultimate-omni-channel-growth-hack-with-hyper-personalization/>. [Click here](#) for detailed instructions.
8. LinkedIn Content Retargeting Outreach.
9. Management + Reporting.
10. Expandi Inbox Management.

- a. Go to Inbox and Filter on Replied - see image.

The screenshot shows the Expandi inbox interface. On the left, there's a sidebar with icons for Dashboard, Campaigns, My Network, and various Expandi services like Webhooks and Placeholders. The main area has a header with a search bar for 'Mike Maxey (DecisionLink)'. Below the header is a toolbar with 'Inbox' (selected), 'Message queue', 'Sync', and filters for 'Enter filter words', 'Apply tag', 'Filter on tags', 'Unread chat', and 'Show chats'. A red arrow points to the 'Replied' filter button in the search bar. The main content area is a table of messages with columns for Name, Tags, Status, and Last Message. A red arrow points to the 'Replied' status column. The table lists several contacts with their last message timestamp: Steven Schroeyens (10:19 AM 22-Mar-2021), Kaumana Rindlisbacher (9:42 AM 22-Mar-2021), Sherri Sklar (3:29 PM 21-Mar-2021), Sunil Hiranniah (9:11 AM 21-Mar-2021), Steve Timperley (1:57 PM 19-Mar-2021), and Cassie Christensen (1:42 PM 19-Mar-2021). To the right of the table is a detailed message view for 'Matt Cockayne' with a message from 'Mike Maxey' and a reply from 'Matt'.

11. Check Smart Links on LinkedIn. Refer to this link: https://www.linkedin.com/sales/smart-links/AQHW2tcjqQ_AJQ.
 - a. Go here: https://www.linkedin.com/sales/smart-links/AQHW2tcjqQ_AJQ
 - b. Tag these people in Expandi "Viewed {Name of Article}". Refer to "How To Apply Tags". [Click here](#).

B. Expandi Set Up

1. Training Watch Demo & review all training - see links:

https://us02web.zoom.us/rec/play/kGzRyJupGlVnEXPHv7FslA9YUsGZkeiXmNrSQa3m0l-LwDhvtsmGwTnZx9vUwHUXLusZ1v3ykf4e5I27.u5JoUH5bigOaEqme?continueMode=true&_x_zm_rtaid=uLgTDXvyTACm0eDbqnFq5A.1616694808647.b619e5621131311a9

https://us02web.zoom.us/rec/play/kGzRyJupGlVnEXPHv7FslA9YUsGZkeiXmNrSQa3m0l-LwDhvtsmGwTnZx9vUwHUXLusZ1v3ykf4e5I27.u5JoUH5bigOaEqme?continueMode=true&_x_zm_rtaid=uLgTDXvyTACm0eDbqnFq5A.1616694808647.b619e5621131311a9

a. Watch this: <https://expandi.io/live-demo/>

b. Review this: <https://help.expandi.io/en/>

c. Watch this:

https://us02web.zoom.us/rec/play/kGzRyJupGlVnEXPHv7FslA9YUsGZkeiXmNrSQa3m0l-LwDhvtsmGwTnZx9vUwHUXLusZ1v3ykf4e5I27.u5JoUH5bigOaEqme?continueMode=true&_x_zm_rtaid=uLgTDXvyTACm0eDbqnFq5A.1616694808647.b619e5621131311a9

https://us02web.zoom.us/rec/play/kGzRyJupGlVnEXPHv7FslA9YUsGZkeiXmNrSQa3m0l-LwDhvtsmGwTnZx9vUwHUXLusZ1v3ykf4e5I27.u5JoUH5bigOaEqme?continueMode=true&_x_zm_rtaid=uLgTDXvyTACm0eDbqnFq5A.1616694808647.b619e5621131311a9

https://us02web.zoom.us/rec/play/kGzRyJupGlVnEXPHv7FslA9YUsGZkeiXmNrSQa3m0l-LwDhvtsmGwTnZx9vUwHUXLusZ1v3ykf4e5I27.u5JoUH5bigOaEqme?continueMode=true&_x_zm_rtaid=uLgTDXvyTACm0eDbqnFq5A.1616694808647.b619e5621131311a9

2. Create Campaigns in Expandi.

a. Connector Campaign. [Click here.](#)

b. Messenger Campaign

3. Add New LinkedIn Account - see the checklist.

a. Verify if LinkedIn Account needs to be added.

b. Coordinate with the client with time for a code.

c. Create Warm-Up limits (start and end = 15 - 65; increase by 1)

d. Settings = Delete Connection Request after 14 days

e. Set Time Zone & Active times (see others as an example)

4. Correct all first names and company names, import using this format. See attached format, click to see attachment --> Expandi Import.csv

5. Review Connector Campaign Message Example. [Click here.](#)

End of Procedure.

Related docs/drawings

- Refer to Main Procedure for the hyperlinks.

Advanced: Embed Google Drive, Google Slides, Google Docs, Google Sheets, PDFs, and videos by simply typing **/em**, adding the link you'd like to embed, and hitting **enter**.

Owner

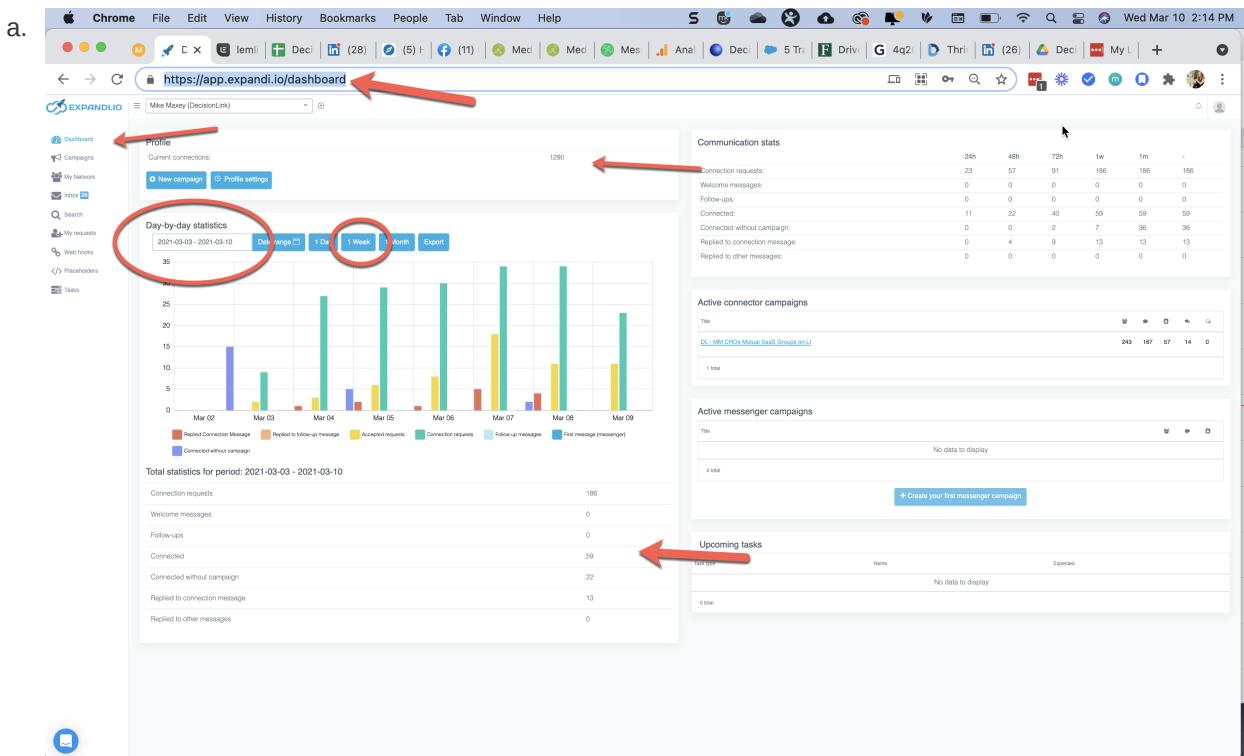
@Elise Michelle Lim

@Liana Faith De Leon

Weekly Reporting Instruction - Done Weekly on Thursdays.

Below are the steps on Weekly Reporting.

1. Go to Dashboard and choose Account Dashboard and look for weekly stats - see image.



2. Next Click on Campaigns and click into Active Campaign (note may be more than one) See Image.

a.

The screenshot shows the Expandi.io platform interface. On the left, a sidebar lists various options: Dashboard, Campaigns (which is selected and highlighted with a red arrow), My Network, Inbox (28), Search, My requests, Web hooks, Placeholders, and Tasks. The main area is titled 'My campaigns' and contains a table of active campaigns. The table has columns for Status, Type, Title, and various metrics like 243, 167, 57, etc. A red circle highlights the 'ACTIVE' status filter button in the table header, and another red arrow points to the first row of the table, which also has an 'ACTIVE' status. At the bottom of the table, it says '5 total'.

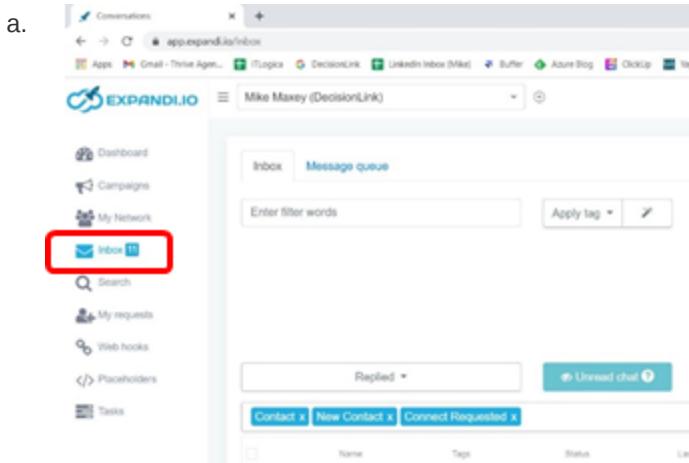
3. Add Stats to the Tracking Sheet tab (will differ per client).

Go to [Main SOP](#) (Expandi Management Procedure)

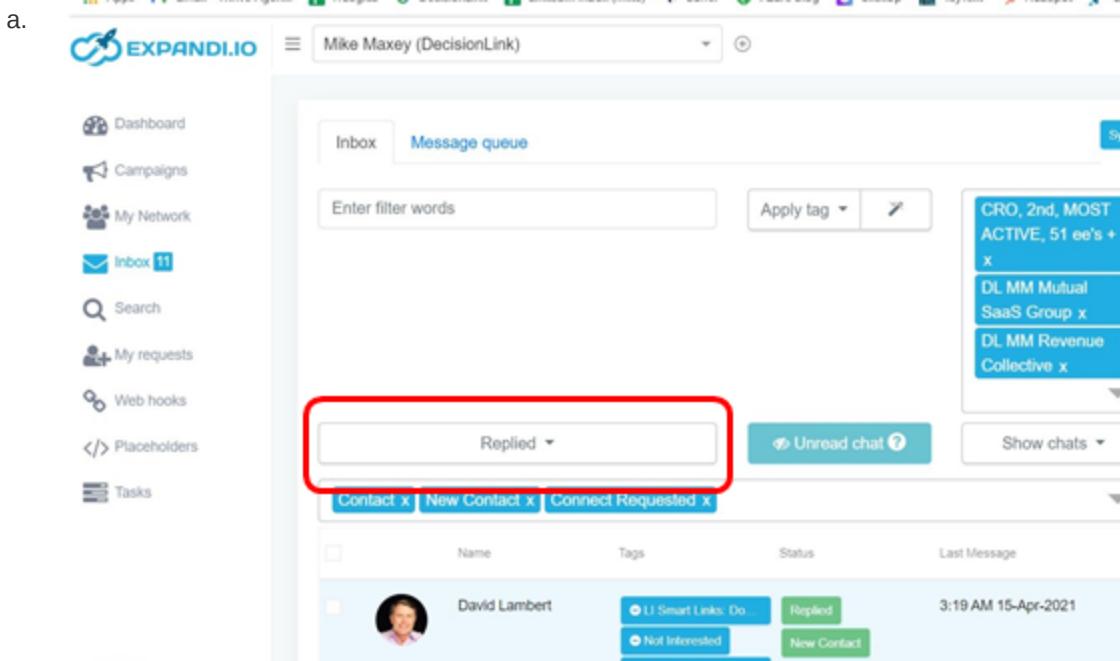
Checking NEW Messages in Expandi

Below are the steps in checking NEW messages in Expandi.

1. Go to Inbox in Expandi <https://app.expandi.io/inbox> - see image.



2. Filter on Status: "REPLIED"



3. Filter on Tags: Choose "All Active Campaigns". Note: Do not choose "Test Person" and "Without Tags".

a.

The screenshot shows a messaging application interface. On the left, there's a sidebar with a search bar and a list of contacts under 'Unread chats'. A red arrow points to a contact named 'DL_MM Mutual User Group' with a checkmark next to it. To the right is a message compose window for 'Karen Pyke'. The window includes fields for 'Type a message', 'Select image template', 'Reply templates', and 'Reply template...'. At the bottom are buttons for 'Notes', 'Info', 'Campaign', and 'Transfer'.

- b. Below is the list of "Active Campaigns"

c.

The screenshot shows the 'Campaigns' section of the Expandi.io dashboard. On the left is a sidebar with various links like Dashboard, Campaigns, My Network, etc. The main area is titled 'My campaigns' and shows a table of active campaigns. The table columns are Status, Type, Title, and Actions. The data is as follows:

Status	Type	Title	Action 1	Action 2	Action 3
ACTIVE	Connector	DL - MM CROs Mutual SaaS Groups on LI	243	233	90
ACTIVE	Connector	2nd/3rd CXOs Revenue Collective	277	269	165
ACTIVE	Messenger	Test Campaign - Messenger	1	1	0
ACTIVE	Connector	CRO_2nd_MOST ACTIVE_ 51 ee's +	918	367	145
INACTIVE	Connector	DL - MM CRO New Job	0	0	0
INACTIVE	Connector	tester campaign	0	0	0

4. Place new messages on the spreadsheet made for the client's Inbox Tab:

https://docs.google.com/spreadsheets/d/18eJ_15wF-

<yxfy0fTd52UYjDakOG11nCFeH08rthUzeo/edit#gid=960017115>

5. Send an email to the client for those who said YES to schedule a meeting with him. Refer to the image below for the template.

a.

The screenshot shows the Expandi.io inbox interface. On the left, there's a sidebar with various menu items: Dashboard, Campaigns, My Network, **Inbox 1** (with a red arrow pointing to it), Search, My requests, Web hooks, Placeholders, and Tasks. Below the sidebar is a URL: <https://app.expandi.io/#>.

The main area has tabs for **Inbox** and **Message queue**. It includes filters for "Enter filter words", "Apply tag", "Filter on tags", "Filter on status", "Unread chat", and "Show chats". Below these are buttons for "Contact x", "New Contact x", and "Connect Requested x".

A table lists messages from five contacts:

	Name	Tags	Status	Last Message
<input type="checkbox"/>	David Reeves	• CRO, 2nd, MOST...	Awaiting Reply New Contact	2:49 PM 09-Apr-2021
<input type="checkbox"/>	John Phan	• CRO, 2nd, MOST...	Awaiting Reply New Contact	1:33 PM 09-Apr-2021
<input type="checkbox"/>	Cameron Johnson	• DL MM Revenue ...	Awaiting Reply New Contact	1:32 PM 09-Apr-2021
<input type="checkbox"/>	Rich Blakeman	• LI Smart Links: D... • Not Interested • CRO, 2nd, MOST...	Awaiting Reply New Contact	1:26 PM 09-Apr-2021
<input type="checkbox"/>	Clive Punter	• CRO, 2nd, MOST...	Awaiting Reply	12:50 PM 09-Apr-2021

The right side shows a detailed view of a message from **in David Reeves**. The message content is:

Hope 2021 is off to a solid start for you. As a fellow CRO, let's connect and share the knowledge! If I can ever be of help or make any introductions, just let me know.

Mike
CRO Decisionlink
770-314-7198

2:49 PM | Apr 9

Below the message is a compose area with "Type a message", "Select message template", and "Sync from Hyperise". There are sections for "Reply templates" (with a red arrow pointing to it) and "Transfer". Buttons for "Notes", "Info", and "Campaign" are also present.

Also, see the image below (after the approval of the client):

Hi Mike,

Below is a list of prospects willing to hop on a call with you. Please let me know if they are approved for scheduling so I can put them on your Calendly. I have attached their names together with the necessary information.

NAME

Company Name

No. of Employees on LI:

LI URL:

Message String URL:

Last message received:

Go to [MAIN SOP](#) (Expandi Management Procedure)

Hyperise - Send hyper-personalized campaign images.

Below are the steps in sending hyper-personalized campaign images:

1. Go to Hyperise API settings and create an API token and copy the ID.
2. Click this link: <https://www.youtube.com/watch?v=520OAz5uUQ0>
3. Go back to Expandi. Go to Profile Settings and paste in the API.
4. Select Hyperise images to use directly in your Expandi LinkedIn campaign steps. To do this:
 - a. Add a new image to your Hyperise account.
 - b. Refresh your image list in Expandi.
5. Image - In short: the optimal image size is roughly the ratio of a square. As this will be more visible in the smaller preview. Aim for around 850×466 size ratio for the image, 100×100 for the profile picture, and always test your outreach message/image with a coworker (or a friend) before launching a real campaign.
6. Set up your images within Hyperise. To do this:
 - a. Set the image width and height in the Canvas settings. Or
 - b. Choose an image outside Hyperise, edit as needed, and then Adjust to set the size.

Go back to [MAIN SOP](#) (Expandi Management Procedure)

Create OmniChannel Workflow

Below are the steps in creating OmniChannel Workflow:

1. Create an offer our target market will be sure to enjoy (Top LinkedIn Outreach Strategies PDF in this case) and make a post about it on LinkedIn telling people to comment if they want to receive the guide.
2. Endorse the post via Lempod to increase its views, reach, and awareness.
3. Create a campaign on Expandi to connect with everyone who commented.
4. Create two email outreach campaigns on Lemlist (one with the PDF attached, and a follow-up 1 day later once they click on the PDF).
5. Create webhooks Zapier to link connect everything together (Expandi to Zapier and Lemlist).

Go to [MAIN SOP](#) (Expandi Management Procedure)

Connector Campaign

Below are the steps in Connector Campaign:

1. Create a search in SN - Name the Search
2. Create a search in Texau with SAME name as SN Saved Search
3. Wait a few minutes, search for results and export as CSV from Texau
4. Delete columns B, C, G - O.
5. Map the remaining columns as attached Expandi Import example.
6. Examine to make sure all names, company names are correct. In FIRST NAME column remove/edit all ".", initials or ")" - anything that is not their first name. This is VERY Important.
7. Use the correct format to Import to Expandi - see attached. <https://t8514440.p.clickup-attachments.com/t8514440/b4c7d77e-34b5-478c-b9a7-b8849a05c2df/Expandi%20Import.csv>
8. Import according to the attached list.

Go to [MAIN SOP](#) (Expandi Management Procedure)

Connector Campaign Message Example

See sample message:

{Greetings) {Personalize by the first name},

{Why you should connect or what's in it for them} {If appropriate, add Call to action”}

184 characters:

Hi Joe,

Saw that you are the in a marketing role. I am very well networked with leading industry professionals in B2B marketing space and thought we could benefit from connecting. Thx.

Hey Joshua,

Would you be interested in increasing your guaranteed income at retirement by 30-60%?

Shoot me a message if you would like to learn more or schedule a very brief call, Joshua.

Than

Go to [MAIN SOP](#) (Expandi Management Procedure)

How To Apply Tags

Below are the steps in applying tags:

1. Check the box from the left for the person you want to apply a tag.

a.

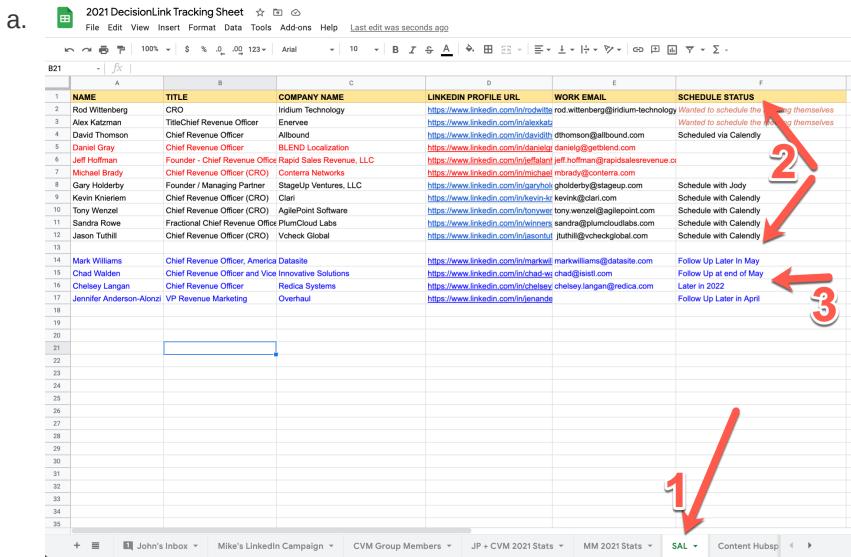
The screenshot shows the Expando.io inbox interface. On the left is a sidebar with various icons and links: Dashboard, Campaigns, My Network, Inbox (with 11 notifications), Search, My requests, Web hooks, Placeholders, and Tasks. The main area has tabs for 'Inbox' and 'Message queue'. Below these are filters for 'Enter filter words' and 'Replied'. A prominent 'Apply tag' button is at the top right. A dropdown menu is open, listing several tag categories. In the contact list below, David Lambert is highlighted with a red circle around his profile picture and checkmark. His tags are listed as 'LI Smart Links: Do', 'Not Interested', and 'CRO, 2nd, MOST'.

2. After checking, click "Apply Tag" and check from the drop-down which tag should you apply.

a.

This screenshot is similar to the previous one, showing the inbox interface with the 'Apply tag' button and its dropdown menu highlighted by a large red circle. The dropdown menu lists various tag categories such as 'Already in CRM', 'Board Member or Client', 'CRO, 2nd, MOST ACTIVE, 51 ee's +', etc. The contact list below shows David Lambert checked and Sudhi Kowlagi unselected.

3. Tag all people we schedule as 'SAL' (see sample image)

a. 

B21	A	B	C	D	E	F
1	NAME	TITLE	COMPANY NAME	LINKEDIN PROFILE URL	WORK EMAIL	SCHEDULE STATUS
2	Rod Wittenberg	CRO	Iridium Technology	https://www.linkedin.com/in/rodwett	rod.wittenberg@iridium-technology	Wanted to schedule the meeting themselves
3	Alex Katzman	TitleChief Revenue Officer	Enervee	https://www.linkedin.com/in/alexkatz		Wanted to schedule the meeting themselves
4	David Thomson	Chief Revenue Officer	Allbound	https://www.linkedin.com/in/davidthomson@allbound.com		Scheduled via Calendly
5	John T. Johnson	Chief Revenue Officer	Bluebeam Software	https://www.linkedin.com/in/johnjohnson@bluebeam.com		
6	Jeff Hoffman	Founder - Chief Revenue Officer	Rapid Sales Revenue, LLC	https://www.linkedin.com/in/jeffhoff	jhoffman@rapidsalesrevenue.co	
7	Michael Brady	Chief Revenue Officer (CRO)	Contenta Networks	https://www.linkedin.com/in/michaelmbrady	mbrady@contentanetworks.com	
8	Gary Holdery	Founder / Managing Partner	StageUp Ventures, LLC	https://www.linkedin.com/in/garyholdery	gholdery@stageup.com	
9	Kevin Krieger	Chief Revenue Officer (CRO)	Clari	https://www.linkedin.com/in/kevinkrieger	kevin.krieger@clari.com	
10	Tony Wenzel	Chief Revenue Officer (CRO)	AgilePoint Software	https://www.linkedin.com/in/tonywenzel	tony.wenzel@agilepoint.com	
11	Sandra Rowan	Fractional Chief Revenue Officer	PlumCloud Labs	https://www.linkedin.com/in/sandrarow	sandra@plumcloudlabs.com	
12	Jason Tuhill	Chief Revenue Officer (CRO)	Vcheck Global	https://www.linkedin.com/in/jasontuhill	jtuhill@vcheckglobal.com	
13	Mark Williams	Chief Revenue Officer, America DataSite				Follow Up Later In May
14	Chad Wilson	Chief Revenue Officer and Vice Innovative Solutions				Follow Up at end of May
15	Chesley Langan	Chief Revenue Officer	Redica Systems	https://www.linkedin.com/in/chesley-langan	chesley.langan@redicasystems.com	Later in 2022
16	Jennifer Anderson-Alonzi	VP Revenue Marketing	Overhaul	https://www.linkedin.com/in/jenalen		Follow Up Later in April
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35						

4. For the others that are board of advisors or clients, tag 'Board Member or Client'
5. For others that we proactively send invitations to tag with 'Custom response with a CTA'
6. Other tags created are 'Not Interested, Removed - Not a Fit, Follow up Later'

Go to [MAIN SOP](#) (Expandi Management Procedure)

SOP For Hubspot - Social

Header: Hubspot - Social

Purpose

Definitions

Tools needed

Procedure

Related docs/drawings

Owner

Header: Hubspot - Social

Purpose

This procedure is intended to provide guidelines on using Hubspot on Social.

Definitions

Define any terms or abbreviations used that will help a new hire get started.

Tools needed

- Access to Hubpot.
- Social media contents.

Procedure

1. Review Training for Hubspot Social - See Link.
 - a. Training Link - <https://knowledge.hubspot.com/social/create-and-publish-social-posts>

2. Log in. See image. Note: Find Decisionlink Account - 3957835

The screenshot shows the HubSpot Marketing > Social interface. At the top, there's a navigation bar with tabs for Contacts, Conversations, Marketing (which is currently selected), Sales, Service, Automation, and Reports. Below the navigation bar is a sidebar with sections for Ads, Email, Social, Website, Files, Lead Capture, and Planning and Strategy. The main content area features a large red '1' at the top. Below it is a search bar with dropdowns for 'Select a campaign', 'All users', 'All post types', and a checked 'Show Drafts' option. The date 'April 2021' is centered above a weekly calendar grid. The calendar shows various posts scheduled for different days of the month, with some posts having '3 more' or '2 more' additional posts listed below them. The days of the week are labeled TUESDAY through SATURDAY.

3. Create Schedule.

This screenshot shows the same HubSpot Marketing > Social interface as the previous one, but the calendar grid for April 2021 is shown without any scheduled posts. The days of the week are labeled SUNDAY through SATURDAY. The interface includes a top navigation bar, a sidebar with social media management options, and a search/filter bar at the top of the calendar grid.

- In your HubSpot account, navigate to **Marketing > Social**.
 1. Click the **Settings** tab.
 2. Click the **Publishing** tab.
 3. Hover over a day you want to add a publish time to, then click **Add time**.
 4. In the dialog box, reference the publish times previously written down and select a **time** and any additional **days** of the week you want this time to apply to. When you're done, click **Apply**.

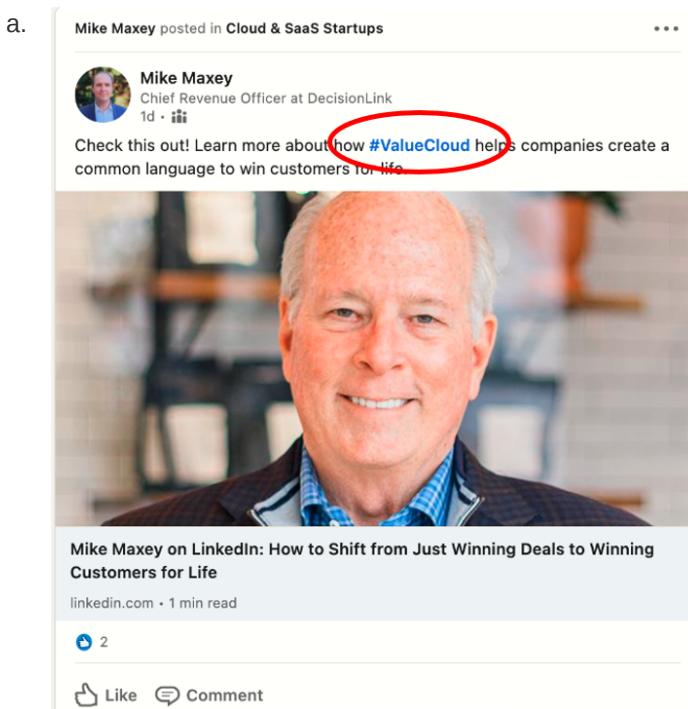
5. To delete an existing publish time, hover over the time and click the **trash can icon** delete.
6. To vary your publish times so that posts are published within 10 minutes (before or after) of the scheduled time, click to toggle the **Publish like a human** switch on.

4. Create Post.

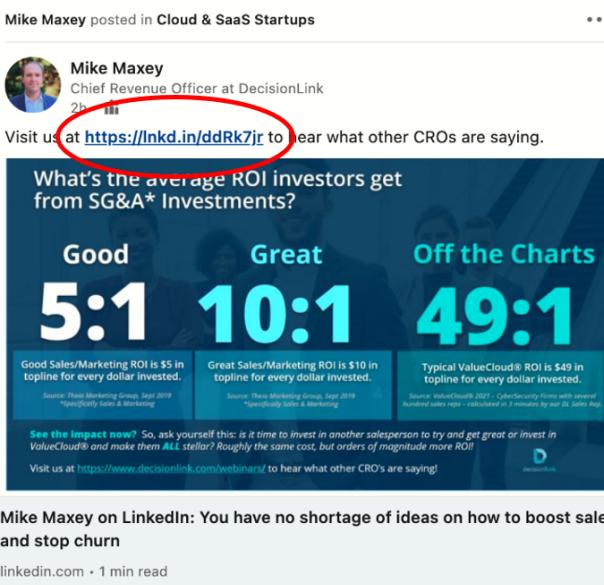
- a. Navigate to **Marketing > Social**.
- b. In the upper right, click **Create a social post**.
- c. In the right panel, select the **social network** to publish your social post to. (LI, FB, Insta, Twitter).

- **Each post needs:**

1. Hashtags (#symbol) throughout (not just at the end). [Click here](#) for Decisionlink Hubspot-approved hashtags.



2. A link to drive traffic with UTM parameters and “EMBEDDED” Hyperlinks.



- As an example of formatting (finished format after it lands on LinkedIn), the client CMO is HERE - <https://www.linkedin.com/in/joannemoretti/detail/recent-activity/shares/>. Please format the posts as she does. With @mentions of people and hyperlinks (where necessary). See sample image:

 **Joanne Moretti** • 3rd+
CMO & Board Member Decisionlink / Founder & CEO JCurve Digital
8h •

Dear **#CRO** do you have a hole in your pants? Check out Jim Berryhill's latest article in Destination **#CRM** Magazine to find out what that really means.

[...see more](#)



Customer Value Management: Filling the Value Gap in CRM Tools
destinationcrm.com • 4 min read

- For some functions, this MAY need to be done AFTER the post is published, by going in at 'editing' post.

- Edit Content + graphics in Hubspot Post.**

- Add/Edit Content
- Add Emojis
- Hashtags using the **# symbol**. (Hashtags will not be hyperlinked in the drafted post or in the preview, but will be hyperlinked after you publish the post.)

- Attaching links plus content.**

- Note: After you've drafted your post content, choose the content you're going to promote.*
 - To attach a HubSpot-hosted blog post or landing page to your post, click the **attach icon** attach and select the **blog post** or **landing page**, then click **OK**. This will insert the title and link of your content directly into your social post.
 - If you want to share content that isn't hosted on HubSpot, enter the **content link** directly into the text box.

- iii. Once you've added the content link, a post preview will be generated from the content metadata. This will include a picture (if available), title, meta description (if available), and link.

3. Insert Images.

- After you've added the content for your post, you can insert an image.
 1. To insert an image, click the **image icon** insert image.
 2. You can select an existing image in your file manager, or click **Add image** to upload a new image from your device or a URL.
 3. To use a stock image from Shutterstock, click into the **search bar** and enter a search term, then press the **Enter** key and click the **Stock images** tab. Click an **image** to review its details, then click **Insert** to add it to your social post.
 4. If you're posting to Facebook, LinkedIn, or Twitter, you can post up to four images in one social post. Click the **image icon** insert image again to insert another image.
 5. To add alt text for an image:
 - a. Hover over the image, then click **Add alt text**.
 - b. In the dialog box, enter a **description** for your image.
 - c. Click **Save**.
- **Please note:**
 - *Images must be uploaded in one of the following formats: png, jpg, jpeg, gif.*
 - *You can only insert one image for an Instagram post.*
 - *Animated GIFs will play on Twitter and LinkedIn, but will not play on Facebook or Instagram.*
 - Use Canva for social tiles. Check this link: <https://www.canva.com/folder/FAEaXI2MRdg>

4. Insert Video (see Notes).

- a. If you're posting to Facebook, Instagram, Twitter, or a LinkedIn Company Page, you can insert a video by clicking the **video icon** insert "Video". You can select an existing video in your file manager, or click **Upload videos** to upload a new video from your device.

5. Preview Post (see Notes).

- a. You can see a preview of your post before you publish it, to confirm that it appears as you'd expect it to once it's published.
- b. Once you finish editing the content of your post, click the **Preview** button below your post.

6. Submit the draft for approval before publishing. [Click here](#).

7. Publish or Schedule Post (see Notes).

- a. The composer will automatically select a publish time, based on your [social publishing schedule](#), but you can change the date by clicking the **When** dropdown menu. You can select a specific **date** and **time**, or click **Publish now** to publish the social post immediately.

- b. You can optionally select a HubSpot campaign to associate with the social post. In the bottom right, click the **Campaign** dropdown menu and select a **campaign** or click **Create a new campaign**.
- c. Once you've finished setting up your social post, you can choose to publish another post or publish to another social account by clicking the corresponding **social icon** next to **Schedule another**. This will automatically duplicate your existing post content into the new post.
- d. In the bottom left, click **Schedule post** or **Publish post now** to publish the post immediately.

- See sample post:

 Chief Revenue Officer at DecisionLink
4h · 

You have no shortage of ideas on how to boost sales and stop churn.

But when it comes to implementing the best strategies that get the most out of every dollar...

Well, that can be a different story.

Our end-to-end customer value management platform, ValueCloud, quantifies the economic impact that your solutions have on your customers, at every stage of the customer journey (including renewal time).

The end result? Customers for life.

There's a better way to accelerate growth, and it's ValueCloud.



What's the average ROI investors get from SG&A* Investments?

Good	Great	Off the Charts
5:1	10:1	49:1

Good Sales/Marketing ROI is \$5 in topline for every dollar invested.
Source: Thesis Marketing Group, Sept 2019
*Specifically Sales & Marketing

Great Sales/Marketing ROI is \$10 in topline for every dollar invested.
Source: Thesis Marketing Group, Sept 2019
*Specifically Sales & Marketing

Typical ValueCloud® ROI is \$49 in topline for every dollar invested.
Source: ValueCloud 2011 – Cybersecurity firms with several hundred sales reps – increased to 3 revenue by our Q3 Sales Reps

See the impact now? So, ask yourself this: is it time to invest in another salesperson to try and get great or invest in ValueCloud® and make them ALL stellar? Roughly the same cost, but orders of magnitude more ROI!

Visit us at <https://www.decisionlink.com/webinars/> to hear what other CRO's are saying!

 2

8. Determine Optimal Time to Publish Posts. [Click here.](#)

Related docs/drawings

- Training Link - <https://knowledge.hubspot.com/social/create-and-publish-social-posts>
- Use Canva for social tiles. Check this link: <https://www.canva.com/folder/FAEaXI2MRdg>.

Advanced: Embed Google Drive, Google Slides, Google Docs, Google Sheets, PDFs, and videos by simply typing **/em**, adding the link you'd like to embed, and hitting **enter**.

Owner

@Kamaljt , @Elise Michelle Lim @Liana Faith De Leon @Tracey Fudge

Determine Optimal Time to Publish Posts

Below are the steps to determine optimal time to publish posts:

1. To get a better sense of which times work best for publishing your social posts, you can review your *Top Posts* report and the data on the *Published* tab of your Social dashboard.

Review your Top Posts report

1. You can check the *Top Posts* report to get an overview of the publish times of your top ten social posts:
 - a. In your HubSpot account, navigate to **Marketing > Social**.
 - b. At the bottom of the page, review the *Top Posts* report. You can click the **Filter by** dropdown menu to filter the posts by most interactions, most impressions, most clicks, or most shares.
 - c. To view the post time of one of your top posts, click on the **post**. In the side panel, take note of the publish time below the content of your post.

Analyze and filter your published social posts

1. If you're looking to get more data on optimal to publish times based on all your social posts, you can filter and review publish times on your Social dashboard:
 - a. In your HubSpot account, navigate to **Marketing > Social**.
 - b. In the upper left of the table, leave the account filter set to *All accounts* and the campaign filter set to *All campaigns*.
 - c. At the top of the table, click the **Clicks** column header to sort your published social posts by the number of clicks received.
 - d. Review the *Time* column to see the date and time each post was published. Write down the publish times of the 10 most frequently clicked posts to determine what time of day works best.
 - e. You can also choose to factor in social posts that generated high interactions, such as likes and comments. If you do, write down the publish times of the 10 social posts with the most interactions and clicks instead.

Go to [MAIN SOP](#) (Hubspot - Social)

Hubspot-Approved Hashtags for Decisionlink

Below are Hubspot Approved Hashtags for Decisionlink:

#CustomerValueManagement

#ValueWins

#ValueSelling

#SalesMethodologies

#SalesTools

#SellValue

#SalesPitch

#ValueWinsCustomersForLife

#ValueBasedSelling

#ValueManagement

#CustomersForLife

#CustomerLifetimeValue

#ValueCloud

#CustomersForLifeRealized

#ValueManagement

Go to [MAIN SOP](#) (SOP For Hubspot - Social)

Draft Approval Process

Steps for approving posts before publishing:

1. Login To Hubspot using Lastpass
2. Select Decision Link Account
3. Select List
3. Go To Drafts
4. Click on the recently saved post draft
5. Review the post Caption, CTA, & Link
6. Ensure that tracking link/UTM Parameters is included
7. Communicate if there any changes required
8. Approve the post and ask VA to schedule as per content calendar.

Go to [MAIN SOP](#) (SOP For Hubspot - Social)