Thrive Operations Procedure Template

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

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 eng content, and outreach opportunities across social and search.
ContentStudio	Is multi-use social media management and content marketing you to discover, compose and share the best content.

Reference: [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.

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Owner

- For identification.

LinkedIn (TF) (SOP)

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 des 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

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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Research (TF) – 3 hours max

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

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)

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Database Build

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

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Content Creation

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

> *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://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

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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Related docs/drawings

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Personalization

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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Related docs/drawings

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Repurpose

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

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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Owner

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Tech

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 ge personalized images and videos. Kickstart client relationships by ma cold emails highly personalized and human from day one.
Expandi	Is a cloud platform that is designed to make automated outreach safe random delays, message frequencies, message limits (and much mo
Hyperise	Is a personalization tool for marketers that they can leverage to creat dynamic images

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

> ***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).

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

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Launch

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

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Other Reference SOPs

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

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

Definitions

Acronym/ Term	Definition
SPF	• Sender Policy Framework. • It is an email authentication system designed to prevent email s It works by verifying that an email message is sent from an auth IP address.
DKIM	• **DomainKeys Identified Mail.** • Is a **technical** standard that helps protect email senders and re from spam, spoofing, and phishing. • It is a form of email authentication that allows an organization to responsibility for a message in a way that can be validated by th recipient
DMARC	• Domain-based Message Authentication, Reporting, and Confor

	• It is a technical standard that helps protect email senders and re from spam, spoofing, and phishing.
Lemwarm	• **Lemwarm** will send emails to other lemlisters by using your acc with some uniquely generated content. ... • This process aims to imitate human behavior to give the impres email providers that you manually send your emails.
B2B	Business-to-business (**B2B**), also called B-to-B, is a form of transact between businesses, such as one involving a manufacturer and who a wholesaler and a retailer

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

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

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).

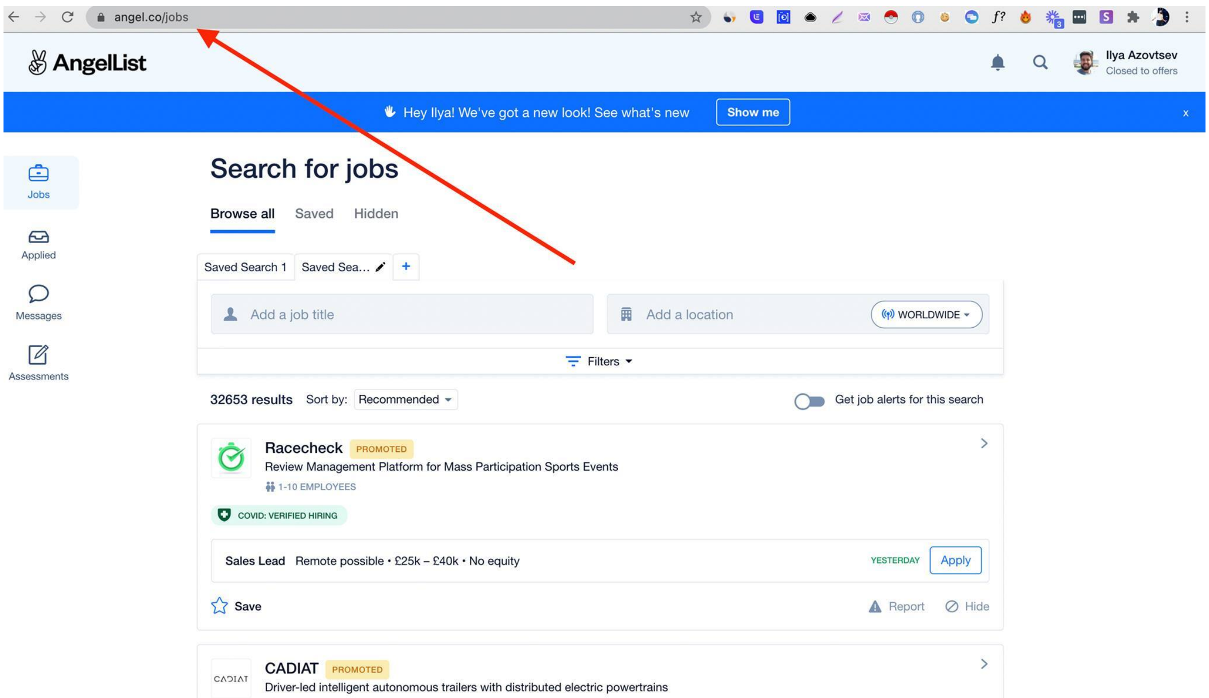
Tools needed

- 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.*

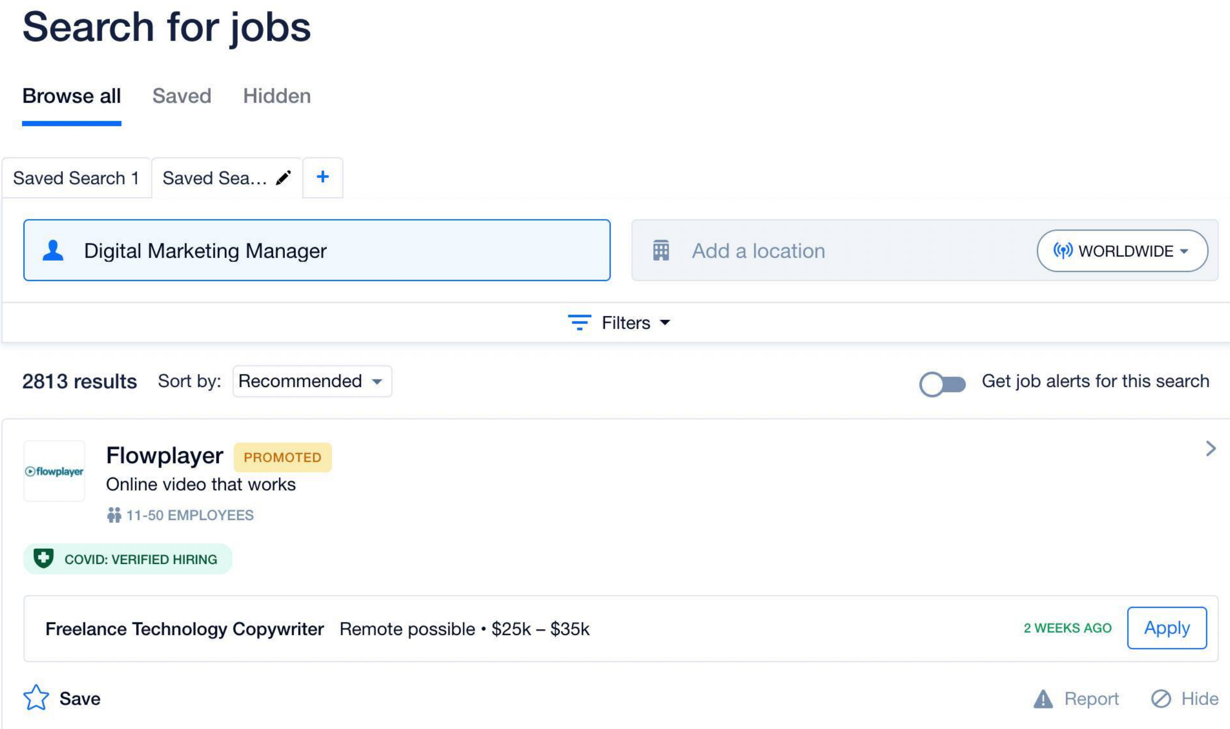
Procedure

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

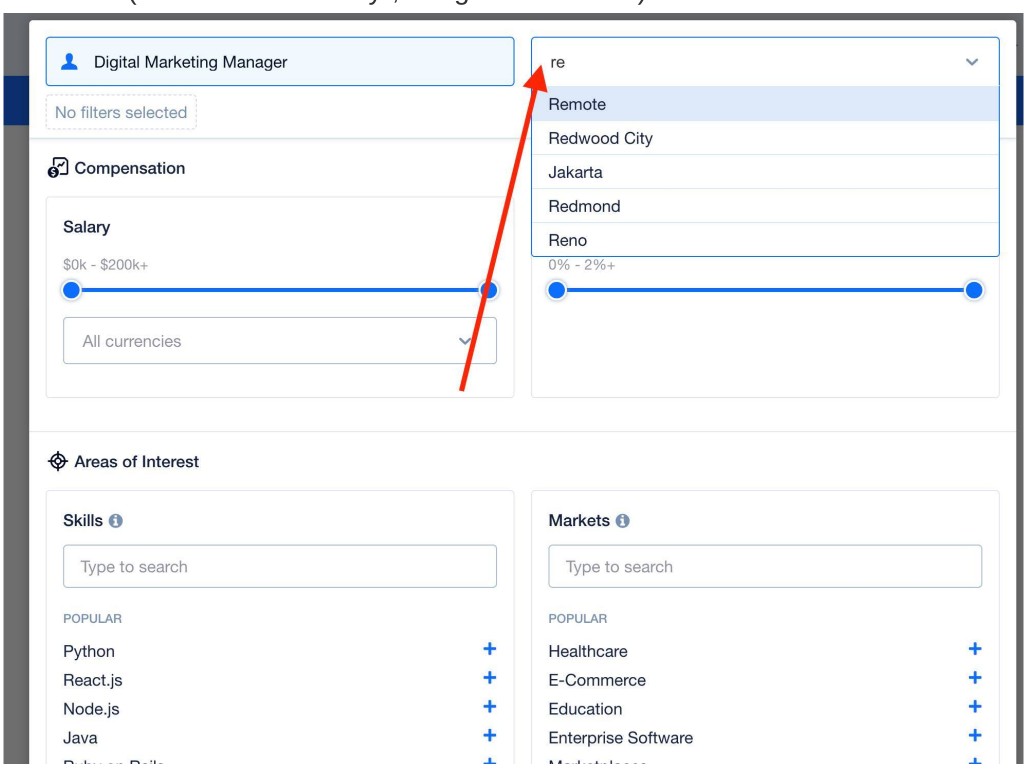
1. Go to [Angel.co](http://angel.co)

1. 

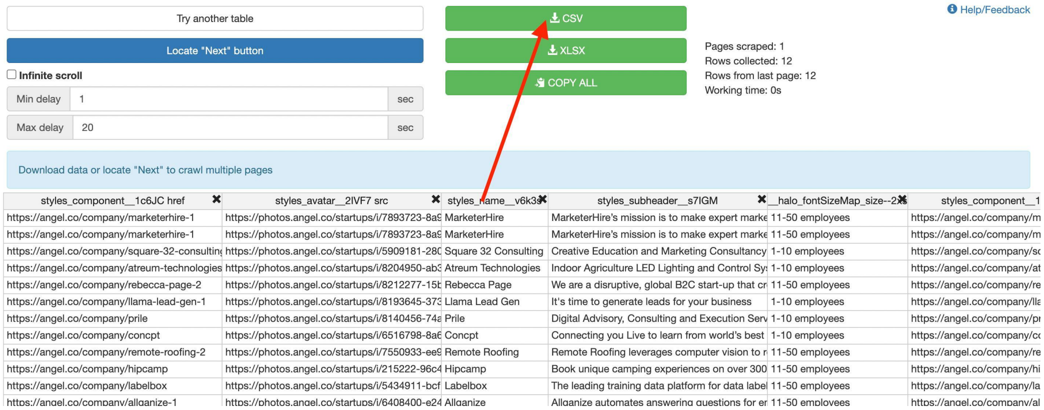
2. Find start-ups who are looking for {position} right now (for example, Digital Marketing Specialist)



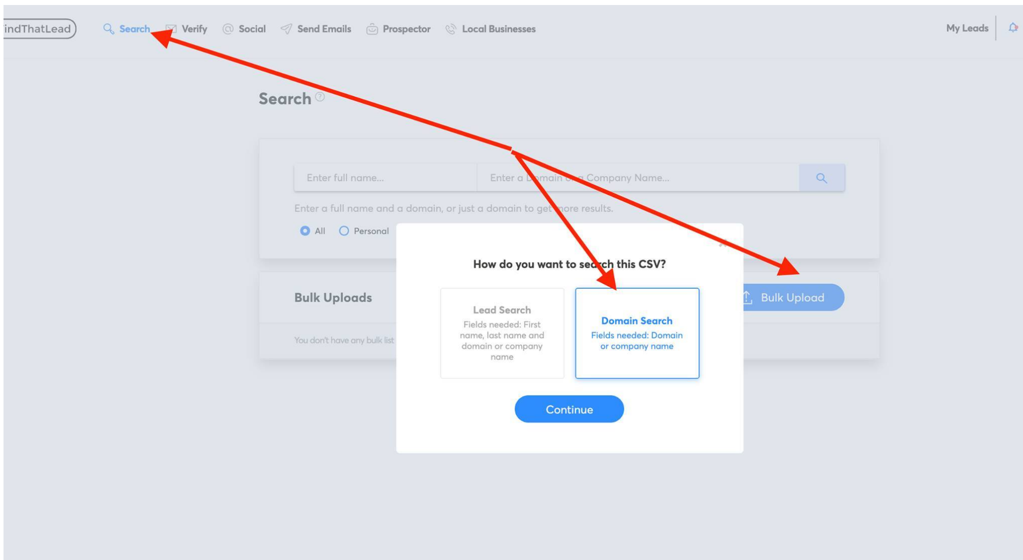
3. Put filters (like “remote-friendly”, budgets and so on)



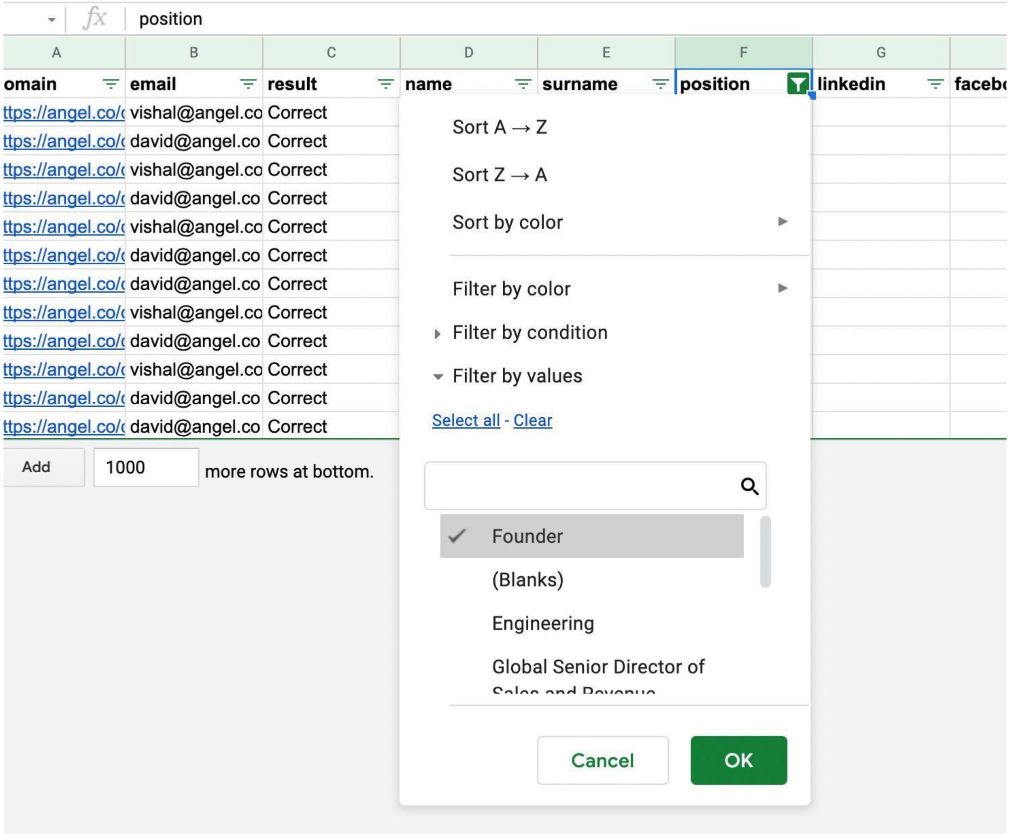
4. Scrape the list with Instant Data Scraper [https://chrome.google.com/.../ofaokhiedipichpaobibbnahnkd...] @Tracey Fudge



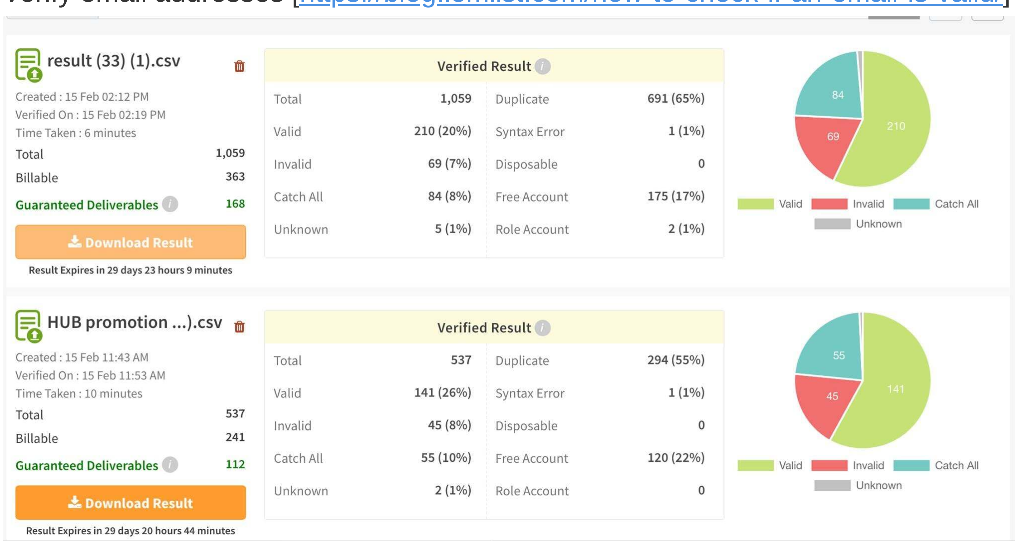
5. Put the list of domains in find that leads.



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/]

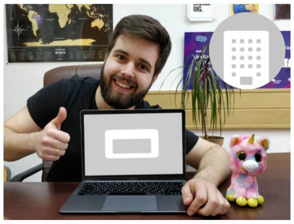


8. Send your campaign (see sample image).

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)

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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`.

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Target Big Companies That are Hiring

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 specif roles and industries. Apart from basic information, the solution pr depth data such as verified emails, contact numbers, social acco

Reference: [Google.com]

Tools needed

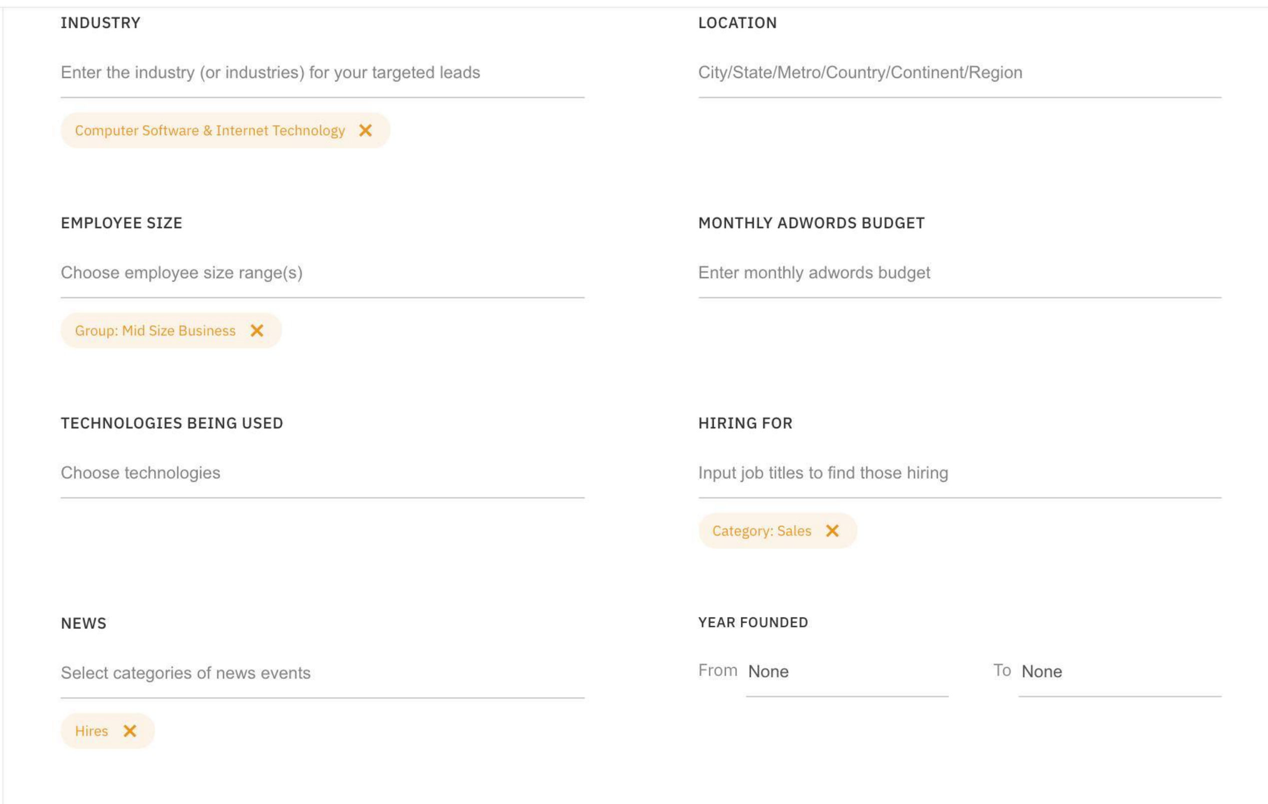
- LeadFuze

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

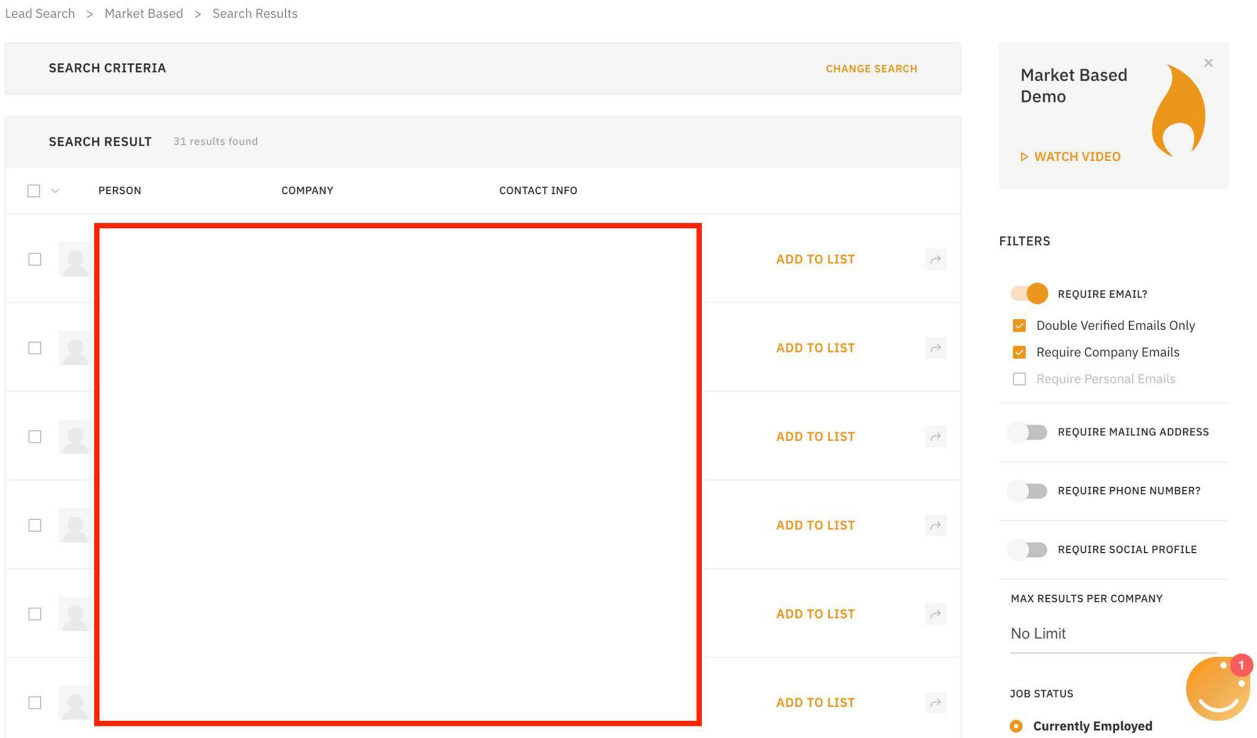
Procedure

> ***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.



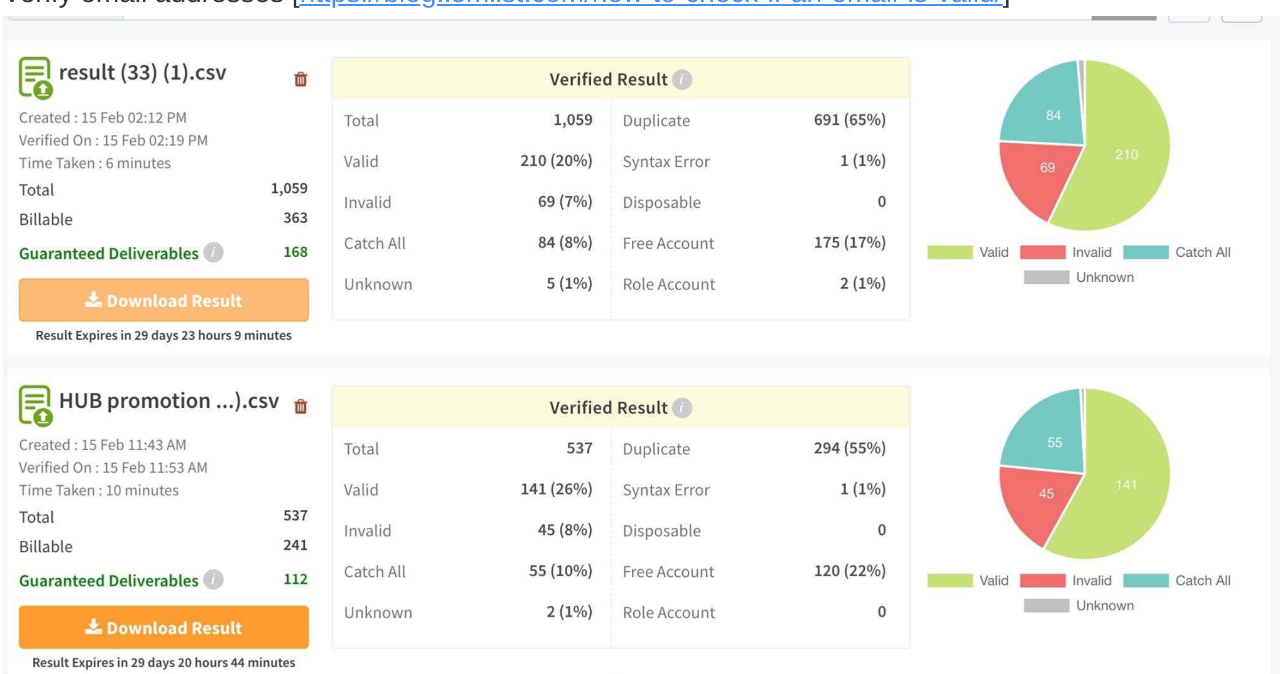
3. Filter people by criteria.



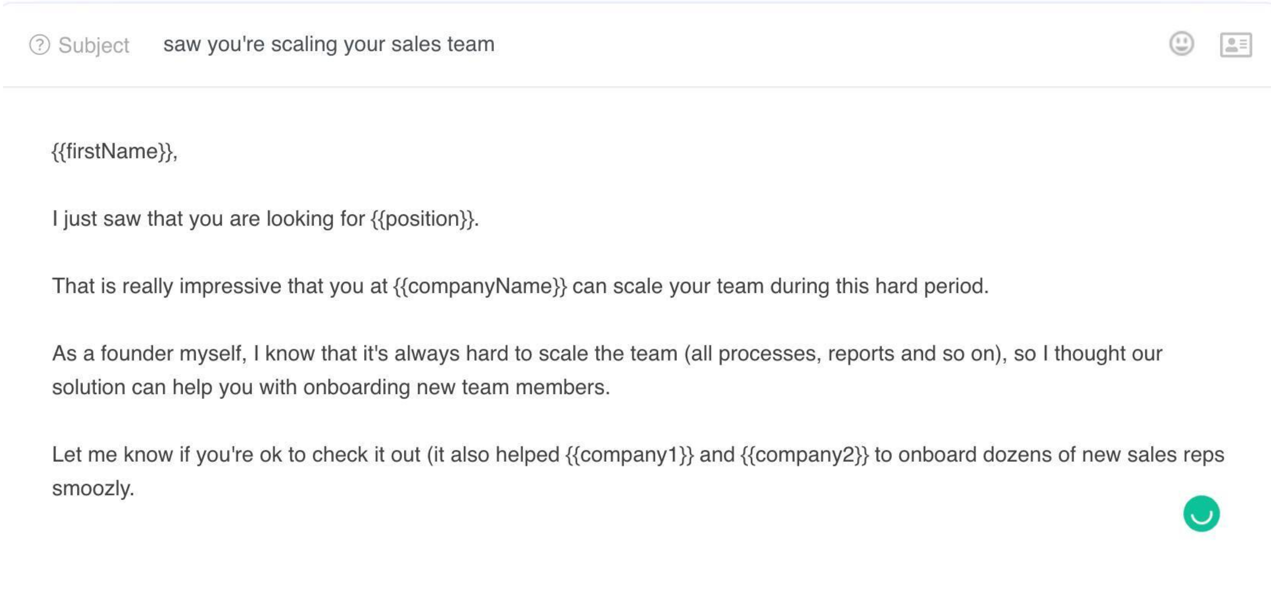
4. Choose “have email addresses” and “double-verified”

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).



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

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.

SOP Accelerator Intensive

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, inte lectures, and other important voice conversations with ***Otter***, your ***AI***-po
Zoom	Is a cloud-based video conferencing service you can use to virtually me others - either by video or audio-only or both, all while conducting live cl

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

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.

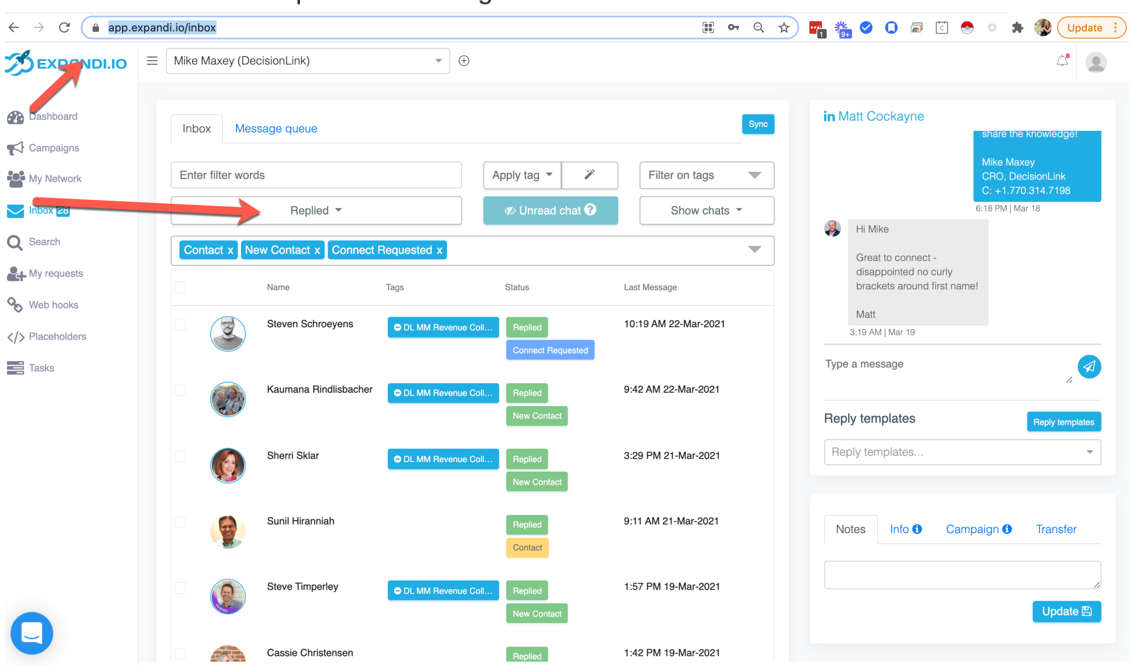
Tools needed

- 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.
       i.



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: LwDhvtsmGwTnZx9vUwHUXLusZ1v3ykf4e5I27.u5JoUH5bigOaEqme?continueMode=true&_x_zm_rtaid=uLgTDXvyTACm0eDbqnFq5A.1616694808647.b619e5621131311a9946f2b030fe97f2&_x_zm_rhtaid=449
    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/kGzRyJupGIVnEXPHv7FslA9YUsGZkeiXmNrSQa3m0l-LwDhvtsmGwTnZx9vUwHUXLusZ1v3ykf4e5I27.u5JoUH5bigOaEqme?continueMode=true&_x_zm_rtaid=uLgTDXvyTACm0eDbqnFq5A.1616694808647.b619e5621131311a9946f2b030fe97f2&_x_zm_rhtaid=449
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`.

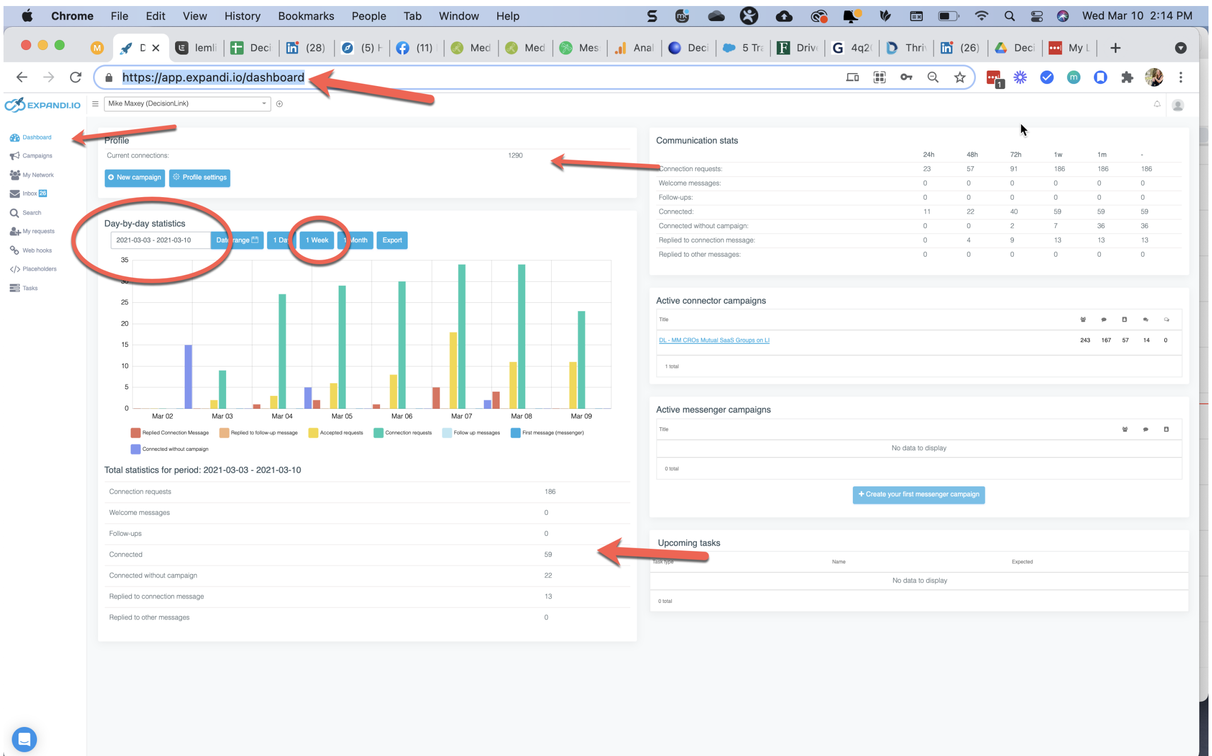
Owner

@Elise Mitchelle Lim

@Liana Faith De Leon

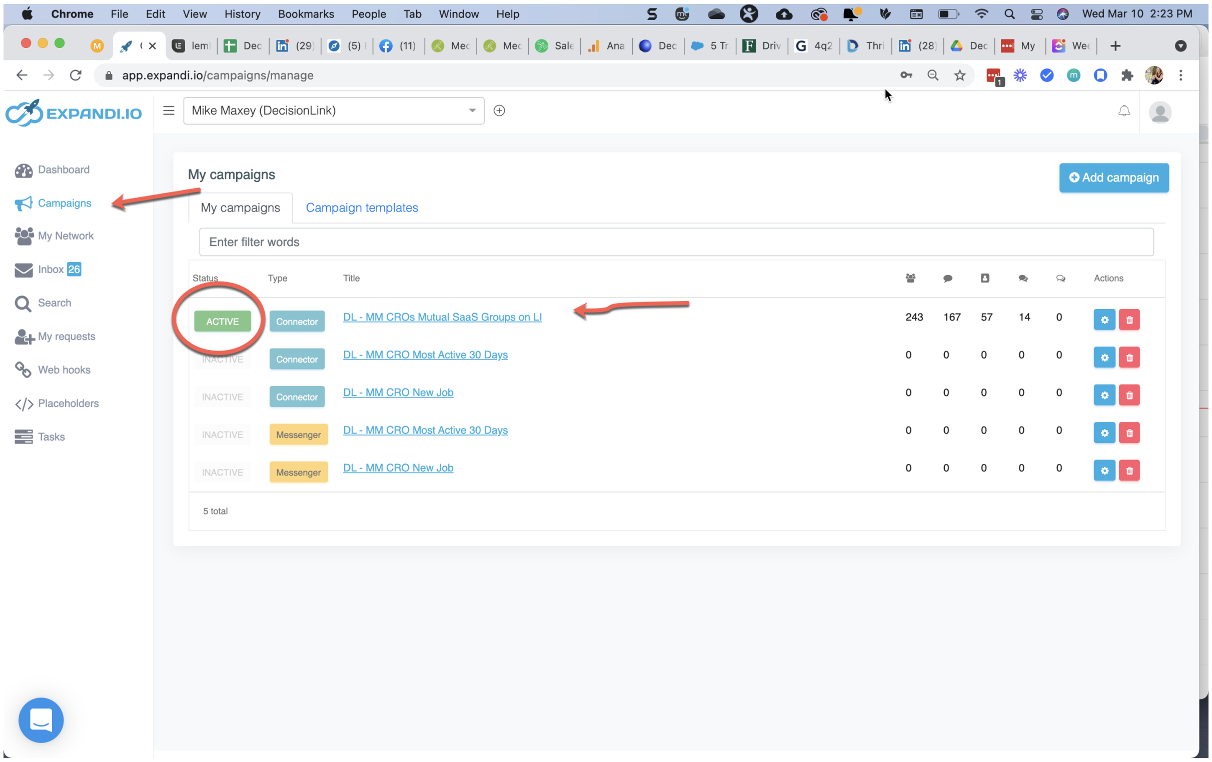
Weekly Reporting Instruction - Done Weekly on Thursdays.

Below are the steps on Weekly Reporting.

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

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

a.

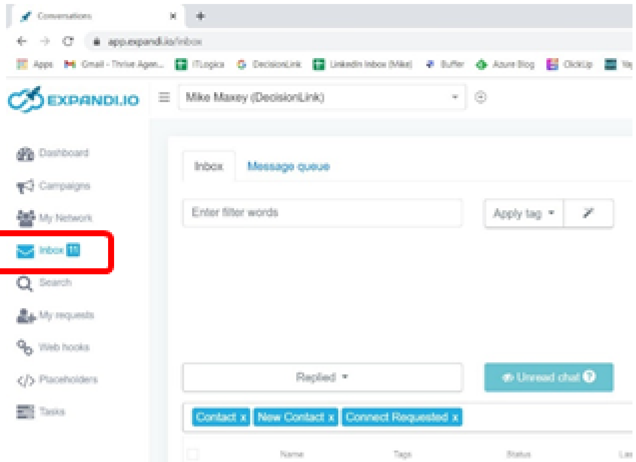


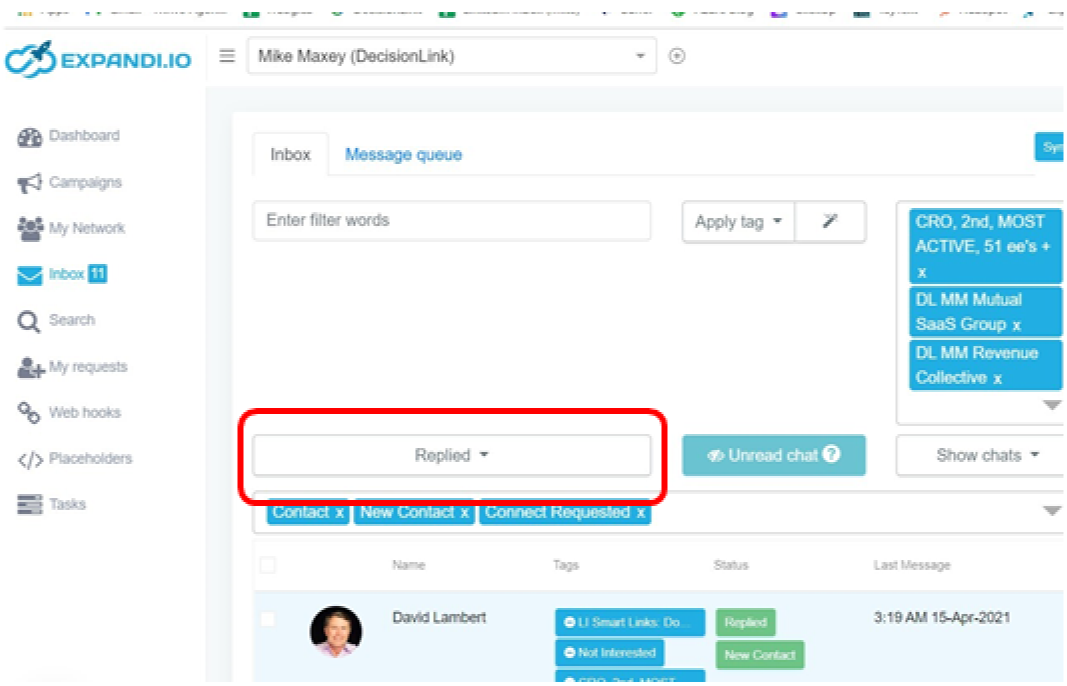
3. Add Stats to the Tracking Sheet tab (will differ per client).

Go to Main SOP (Expandi Management Procedure)

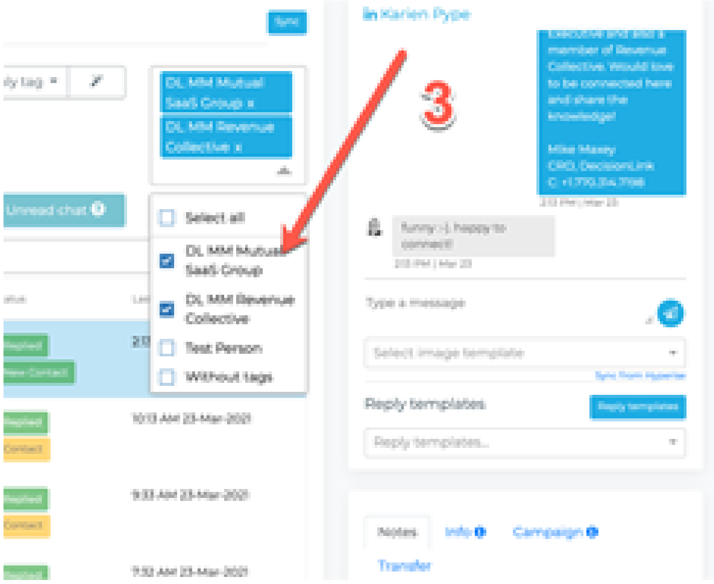
Checking NEW Messages in Expandi

Below are the steps in checking NEW messages in Expandi.

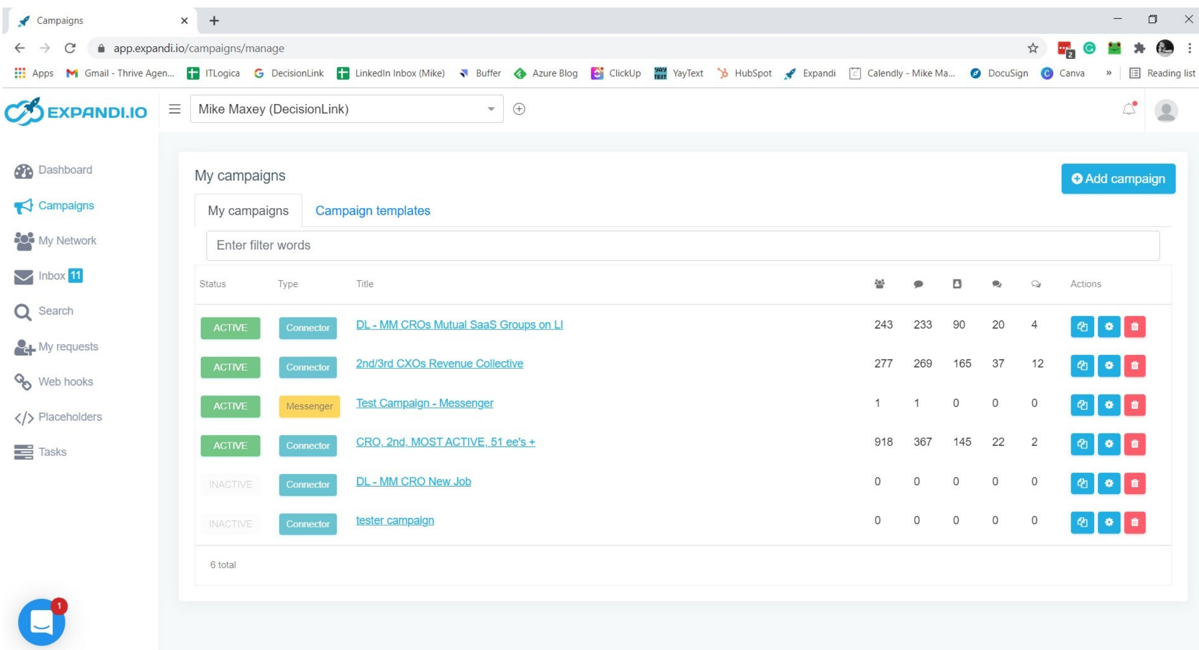
1. Go to Inbox in Expandi https://app.expandi.io/inbox - see image.
    a. 

2. Filter on Status: "**REPLIED**"
    a. 

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

a. 

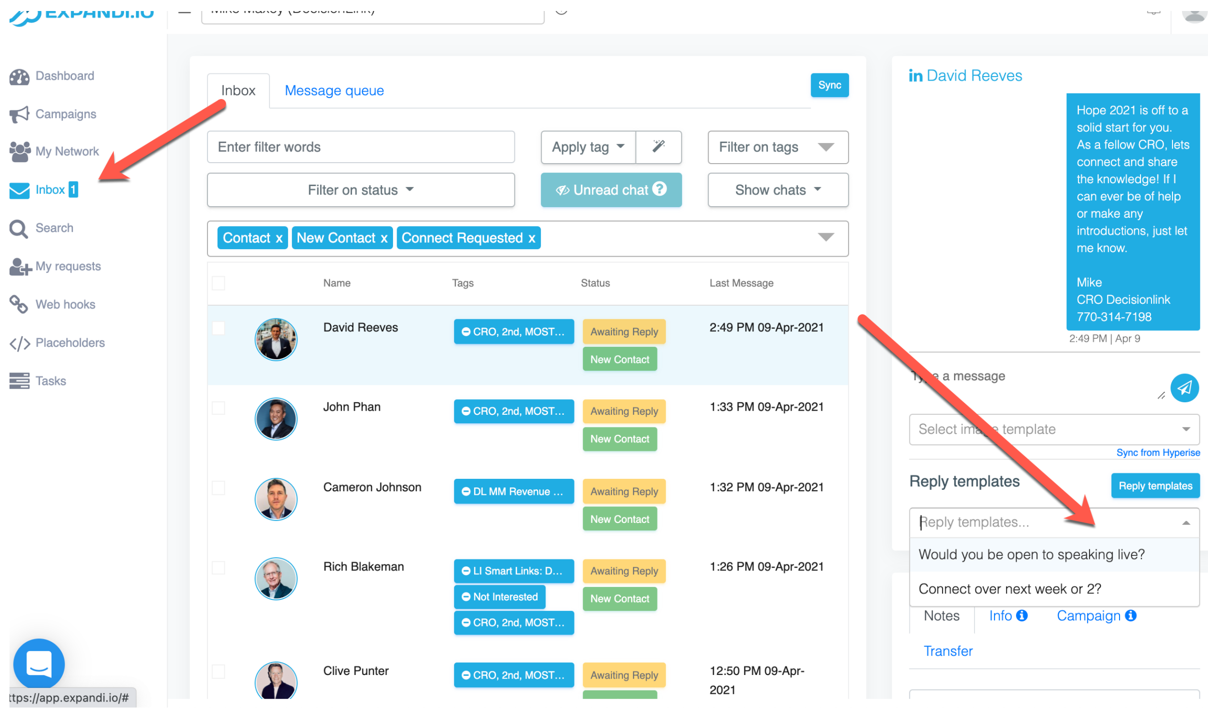
b. Below is the list of "Active Campaigns"

c. 

4. Place new messages on the spreadsheet made for the client's Inbox Tab: [https://docs.google.com/spreadsheets/d/18eJ_15wFF-yxfy0fTd52UYjDakOG11nCFeH08rthUzeo/edit#gid=960017115](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.



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,

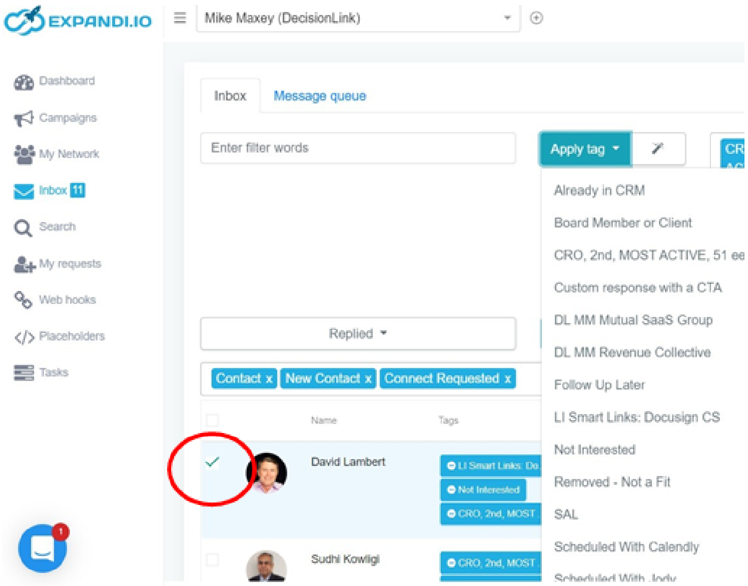
Saw that you are the in a marketing role. I am very well networked with leading industry professionals in B2B marketing space and thought we could benefit from connecting. Thx.

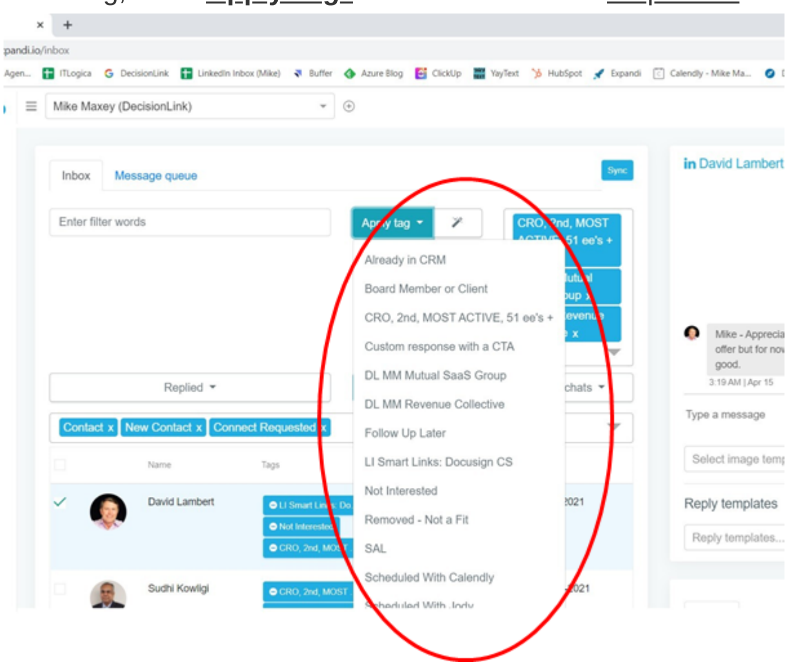
```
Hey Joshua,


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)

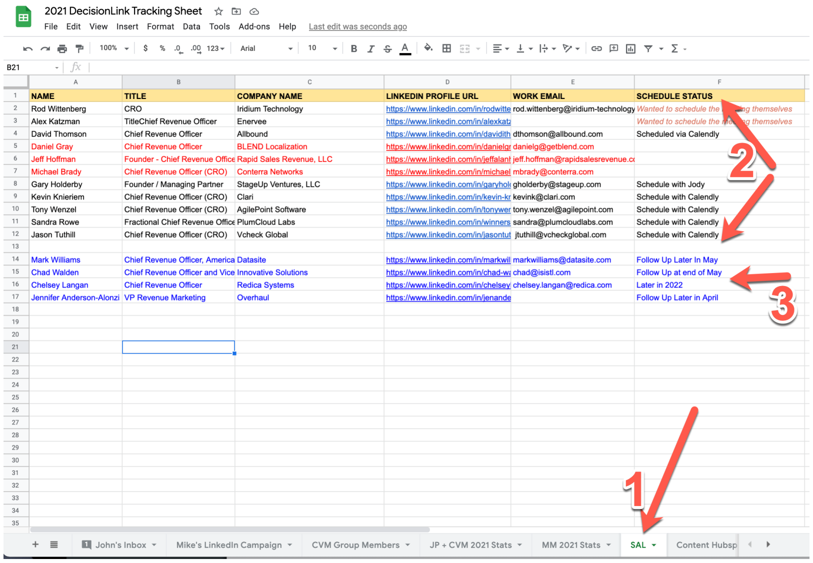
How To Apply Tags

Below are the steps in applying tags:

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

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

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

a. 

NAME	TITLE	COMPANY NAME	LINKEDIN PROFILE URL	WORK EMAIL	SCHEDULE STATUS
Rod Wittenberg	CRO	Iridium Technology	https://www.linkedin.com/in/rodwitte	rod.wittenberg@iridium-technology	*Wanted to schedule the [illegible] themselves*
Alex Katzman	TitleChief Revenue Officer	Enervee	https://www.linkedin.com/in/alexkatz		*Wanted to schedule the [illegible] themselves*
David Thomson	Chief Revenue Officer	Allbound	https://www.linkedin.com/in/davidith	dthomson@allbound.com	Scheduled via Calendly
Daniel Gray	Chief Revenue Officer	BLEND Localization	https://www.linkedin.com/in/danielgr	danielg@getblend.com	
Jeff Hoffman	Founder - Chief Revenue Office	Rapid Sales Revenue, LLC	https://www.linkedin.com/in/jeffalant	jeff.hoffman@rapidsalesrevenue.c	
Michael Brady	Chief Revenue Officer (CRO)	Conterra Networks	https://www.linkedin.com/in/michael	mbrady@conterra.com	
Gary Holderby	Founder / Managing Partner	StageUp Ventures, LLC	https://www.linkedin.com/in/garyhol	gholderby@stageup.com	Schedule with Jody
Kevin Knieriem	Chief Revenue Officer (CRO)	Clari	https://www.linkedin.com/in/kevin-kr	kevink@clari.com	Schedule with Calendly
Tony Wenzel	Chief Revenue Officer (CRO)	AgilePoint Software	https://www.linkedin.com/in/tonywer	tony.wenzel@agilepoint.com	Schedule with Calendly
Sandra Rowe	Fractional Chief Revenue Office	PlumCloud Labs	https://www.linkedin.com/in/winners	sandra@plumcloudlabs.com	Schedule with Calendly
Jason Tuthill	Chief Revenue Officer (CRO)	Vcheck Global	https://www.linkedin.com/in/jasontut	jtuthill@vcheckglobal.com	Schedule with Calendly
Mark Williams	Chief Revenue Officer, America	Datasite	https://www.linkedin.com/in/markwil	markwilliams@datasite.com	Follow Up Later In May
Chad Walden	Chief Revenue Officer and Vice	Innovative Solutions	https://www.linkedin.com/in/chad-wa	chad@isistl.com	Follow Up at end of May
Chelsey Langan	Chief Revenue Officer	Redica Systems	https://www.linkedin.com/in/chelsey	chelsey.langan@redica.com	Later in 2022
Jennifer Anderson-Alonzi	VP Revenue Marketing	Overhaul	https://www.linkedin.com/in/jenande		Follow Up Later in April

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

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.

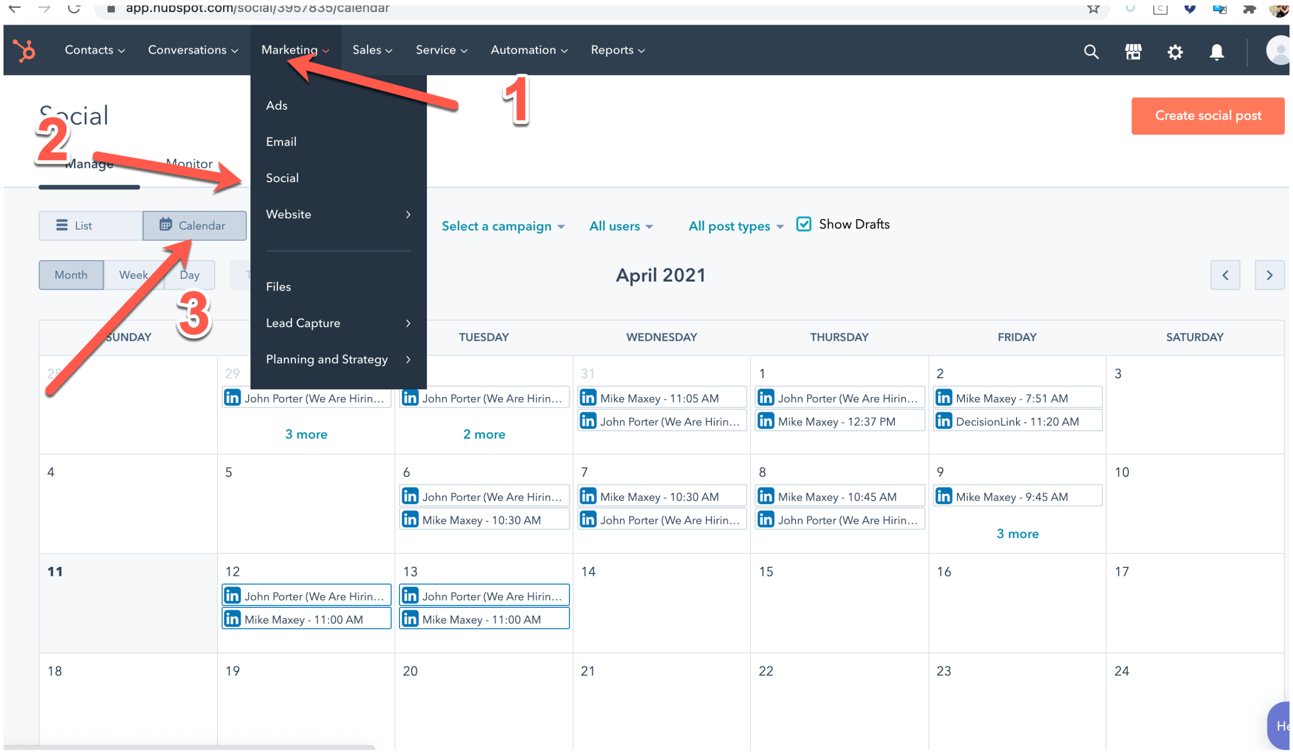
Tools needed

- Access to Hubpot.
- Social media contents.

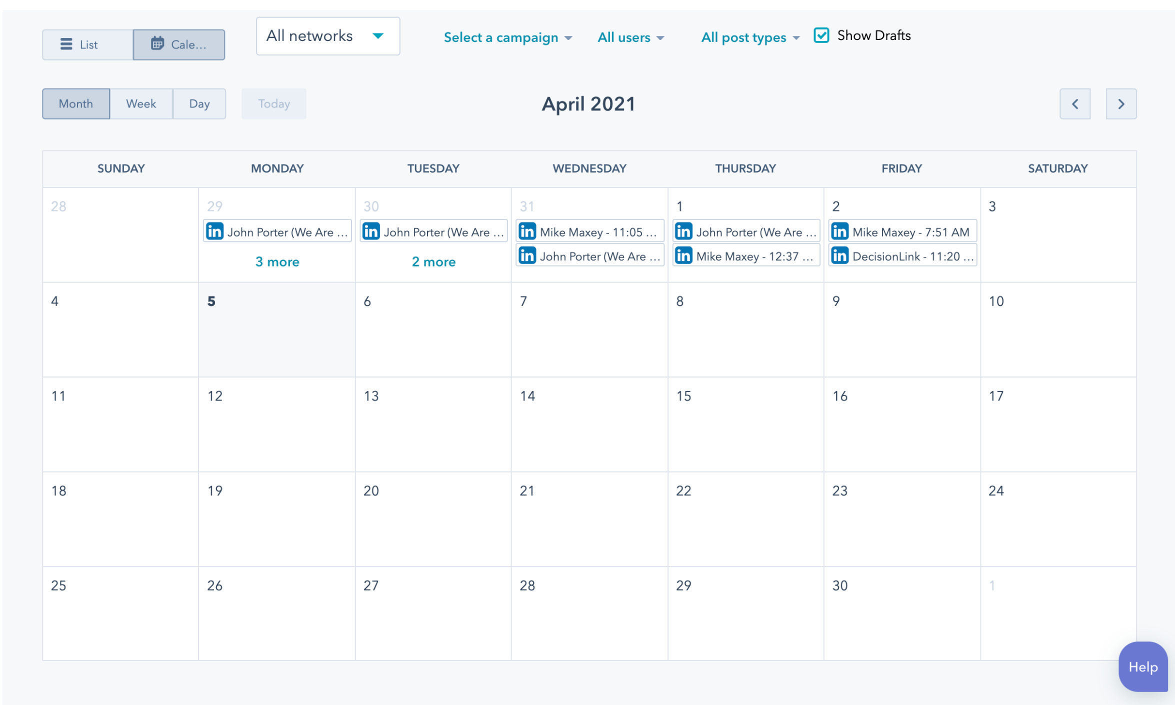
Procedure

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*



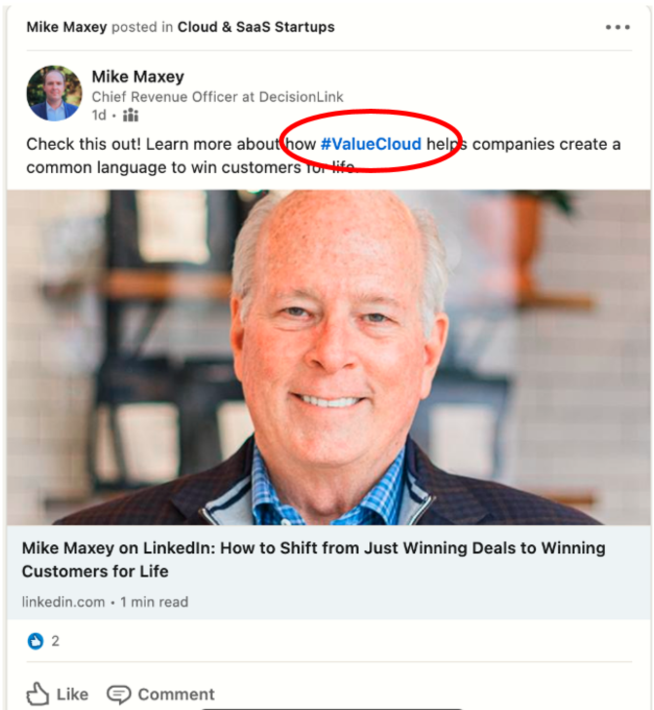
3. **Create Schedule.**

- 

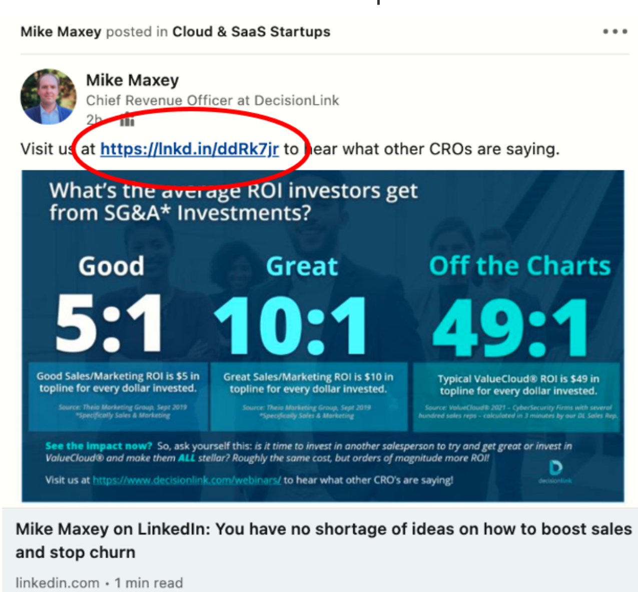
- In your HubSpot account, navigate to **Marketing** > **Social**.
    1. Click the **Settings** tab.
    2. Click the **Publishing** tab.
    3. Hover over a day you want to add a publish time to, then click **Add time**.
    4. In the dialog box, reference the publish times previously written down 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.
      a. 

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



3. 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:

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

1. **Edit Content + graphics in Hubspot Post.**
   a. Add/Edit Content
   b. Add Emojis
   c. 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.
2. **Attaching links plus content.**
   a. *Note: After you've drafted your post content, choose the content you're going to promote.*
      i. 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.
      ii. If you want to share content that isn't hosted on HubSpot, enter the **content link** directly into the text box.

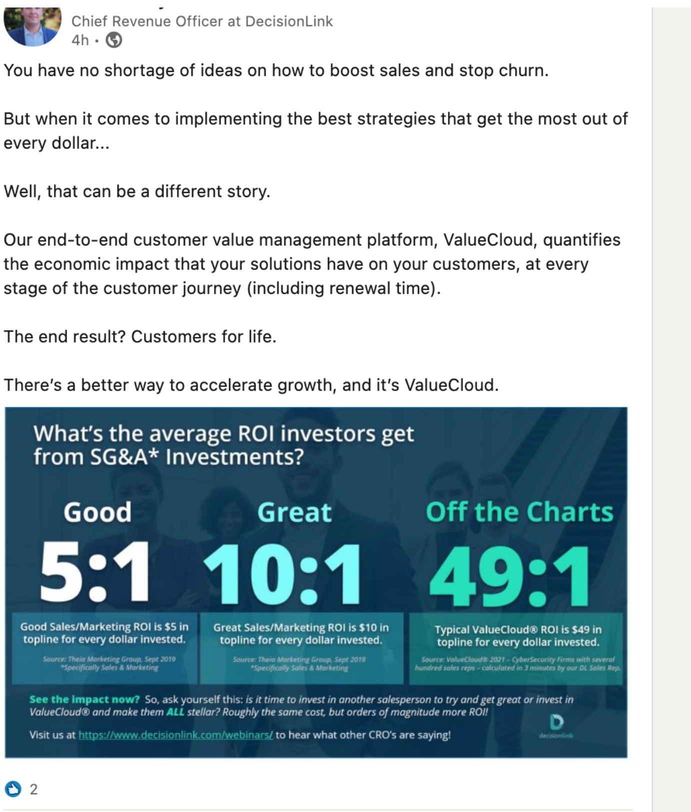
iii. Once you've added the content link, a post preview will be generated from the content metadata. This will include a picture (if available), title, meta description (if available), and link.

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:
- 

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 Mitchelle 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.

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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

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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.

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