

Referral follow up

Action

Step by step process for following up with new referrals and leads

Workflow Template Steps

★ Thank and Invite

Due: Same day as workflow start or previous step completed **Assigned To:** Neha Srivastava

★ **Follow-up** Send Discovery Session Request

Due: 1 day after previous step completed **Assigned To:** Neha Srivastava

★ Session Scheduled?

Due: 1 week after previous step completed **Assigned To:** Neha Srivastava ↕ 5 Outcomes

★ **Onboarding** Update WB Profile w/ Discovery Prep Info

Due: 1 day after previous step completed **Assigned To:** Neha Srivastava

☆ Discovery Session Seen

Due: 1 day after previous step completed **Assigned To:** Neha Srivastava ↕ 2 Outcomes

★ **Follow-up** Referral Thank you card to person who referred them

Due: 1 day after previous step completed **Assigned To:** Briana Perkins

★ **Client Data Updates** Planning/Investment Offer?

Due: Same day as previous step completed **Assigned To:** Neha Srivastava ↕ 3 Outcomes

Step Details

Session Scheduled?

Workflow	Referral follow up
Due	1 week after previous step completed
Priority	★ High
Assigned To	Neha Srivastava
Description	Search calendar for client name.

OUTCOMES

Discovery session scheduled

Go to Step: Update WB Profile w/ Discovery Prep Info

Second attempt- send reminder

Restart Step

Third attempt- send reminder to Referrer

Restart Step

Fourth attempt- send drip marketing email

Complete Workflow

Client Requested Call

Restart Step

Referral follow up

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Workflow Template Steps

- ★ Thank and Invite
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- ★ **Follow-up** Send Discovery Session Request
Due: 1 day after previous step completed **Assigned To:** Neha Srivastava
- ★ Session Scheduled?
Due: 1 week after previous step completed **Assigned To:** Neha Srivastava ↘ 5 Outcomes
- ★ **Onboarding** Update WB Profile w/ Discovery Prep Info
Due: 1 day after previous step completed **Assigned To:** Neha Srivastava
- ☆ Discovery Session Seen
Due: 1 day after previous step completed **Assigned To:** Neha Srivastava ↘ 2 Outcomes
- ★ **Follow-up** Referral Thank you card to person who referred them
Due: 1 day after previous step completed **Assigned To:** Briana Perkins
- ★ **Client Data Updates** Planning/Investment Offer?
Due: Same day as previous step completed **Assigned To:** Neha Srivastava ↘ 3 Outcomes

Action

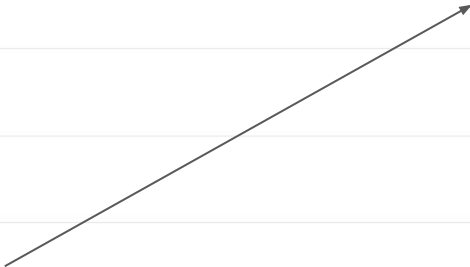
Step Details

Discovery Session Seen

Workflow	Referral follow up
Due	1 day after previous step completed
Priority	☆ None
Assigned To	Neha Srivastava

OUTCOMES

- Yes
Go to Step: Referral Thank you card to person who referred them
- No
Complete Workflow



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Workflow Template Steps

- ★ Thank and Invite
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- ★ **Follow-up** Send Discovery Session Request
Due: 1 day after previous step completed **Assigned To:** Neha Srivastava
- ★ Session Scheduled?
Due: 1 week after previous step completed **Assigned To:** Neha Srivastava ↕ 5 Outcomes
- ★ **Onboarding** Update WB Profile w/ Discovery Prep Info
Due: 1 day after previous step completed **Assigned To:** Neha Srivastava
- ☆ Discovery Session Seen
Due: 1 day after previous step completed **Assigned To:** Neha Srivastava ↕ 2 Outcomes
- ★ **Follow-up** Referral Thank you card to person who referred them
Due: 1 day after previous step completed **Assigned To:** Briana Perkins
- ★ **Client Data Updates** Planning/Investment Offer?
Due: Same day as previous step completed **Assigned To:** Neha Srivastava ↕ 3 Outcomes



Action

Planning/Investment Offer?

Workflow	Referral follow up
Category	Client Data Updates
Due	Same day as previous step completed
Priority	★ High
Assigned To	Neha Srivastava

OUTCOMES

Yes - Update client profile(s)
Complete Workflow

No offer + Follow up - send SOS - "Some things to consider"
Go to Step: Send Discovery Session Request

No offer - Send SOS - Additional Resources
Complete Workflow