



# FINANCIAL ADVISORS **Business Development Service**

## Email Automation Process Flow

for

### Customer Onboarding

#### Introduction

The customer onboarding automation is designed to give new clients a consistent experience when they first engage with your business. The automation will send each new client a welcome email with useful information and a link to a survey, allowing them to provide feedback on their experience with your company so far.

#### Required Data

The following data is required for this automation to work:

- First Name
- Email Address

#### Process Flow

1. The process will be triggered when the contact is added to the 'New Client List' in Active Campaign. This action will be carried out by your office administrative staff – we'll train them how to do it.
2. When the automation starts a 'New Client Welcome Email' will be sent to the contact's email address.
3. The automation will wait for 3 days
4. The automation will check to see if the contact has clicked the link to fill out the feedback survey
5. If the contact has clicked the feedback survey link the automation will end.
6. If the contact has not clicked the feedback survey link a 'Feedback Reminder' email will be sent.
7. The automation will end.

#### Points for Consideration

The following points should also be considered when setting up the review meeting reminder process:

#### Email Wording

You can change the wording of the emails your contacts receive to suit your own personal preferences and writing style. We have included sample wording for the 'New Client Welcome' and 'Feedback Reminder' emails at the end of this document which we will use when setting the automation up.

Please let us have details of any changes you would like to make to the standard wording.

#### Information to send to contacts

You may wish to send the contact some initial information about your company, products, services or staff, etc., with the New Client Welcome email. Please let us know if you have any specific content or information you would like to include.

#### Ongoing emails

You might like to send new clients additional emails containing further information or advice, etc., once they have been set up in the system. Please let us know if you have any suggestions or requirements.

#### Feedback survey questions

As part of this automation your new clients will be asked to complete an online survey providing feedback on their experience with your company so far. You can view a sample survey by [clicking here](#).

You change the standard questions or add your own additional questions to the survey if required. Please let us know of any updates you would like us to make.

The feedback survey will be personalised to your company and include your logo and relevant company details.

## Sample Wording

We have provided below some sample wording you may wish to consider for the emails used as part of this automation. Please let us have details of any changes you would like to make to the sample wording.

### New Client Welcome Email

Dear [[First Name]]

Thank you for your recent business - I'm delighted you've decided to become a client of [[Your Company Name]], and I can assure you we're here to help you stay on top of your personal, family and business finances.

Please don't hesitate to email me or call us if you have any questions or need any assistance. In the meantime, we'd really like your feedback on the service you've received from us so far - please click the button below to fill out our short survey, it will only take a couple of minutes and we take your feedback very seriously.

Thanks again for your business,

Have a great day,

[[Advisor Name]]

### Feedback Reminder Email

Dear [[First Name]]

This is just a quick follow up to the message we sent you a few days ago. We noticed you haven't completed the feedback survey yet, and we'd be really grateful if you could spend a couple of minutes to let us know what you think of the service you've received so far.

Just click the button below to access the survey - it honestly does only take a minute and we read every response we receive.

Thanks for your help and have a great day,

Cheers

[[Advisor Name]]