Lima One

Workflow Strategy & Recommendations

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Taylor Feedback

Lowest Hanging Fruit

- The focus might have to be on creating a bank of templates we can use based on our content types - we may have to recreate the Newsletter email marketing cadence - and be “smarter” with segmentation from the onset until we can implement all necessary custom properties on Leads and Accounts needed to support Workflows.
- Potential Priority Work based on initial feasibility:
    - Newsletter Buckets (3x templates)
        - Solid email templates that we can plug into - 3 different look and feels
    - Lead Trigger - Attempting Contact for > 3 Days
        - 60 Day workflow that then feeds into appropriate Newsletter Bucket
    - Lead Trigger - New CIX Lead
    - Lead Trigger - New Campaign in Salesforce
        - Conference Workflow or scheduled release of 5x emails
    - Account Trigger - Quoted but no deal
        - 60 day campaign to winback
    - Workflows on Slides 4, 7, and 8.3 might be doable from the onset

This requires some alignment with Sales process - need to fix some funnel items on our end before this is feasible.

Welcome + Customer Experience

When a new a deal is submitted, the contact's next nurture touchpoint with Lima One will be a welcome campaign with their next steps, including follow-up NPS engagement. Contacts will only qualify once for this campaign. This workflow educates contacts on their next steps including resources to ensure they're set up for success.

Email #1

Welcome! Here's what to expect, the documents you'll need, and information on who will be reaching out next.

Email #2

Have any questions? Here are some resources and common FAQs to ensure you're set up for success.

Email #3

NPS survey

CTA: Take survey

Email #4

NPS Survey reminder

CTA: Take survey

Take survey

Yes

No

Exit Email Workflow

Need to pin down the appropriate Account Property for this to work - but we can roll with this one soon.

Qualified Nurturing

To those who are are qualified but may still be price shopping (quoted but they didn't open a line of credit and do not have deal closed). We'll send nurturing emails showcasing the value of Lima One and their process. We'll segment email copy when necessary based on the programs of interest noted so this could turn into more emails depending on specific or general we want to be.

Email #1a, b, c, d

a. FixNFlip value prop
b. Rental value prop
c. MultiFamily value prop
d. New Construction value prop

CTA: Open line of credit

Convert

Yes No

Email #2

When it comes to Lima One, there's simply no comparison. See for yourself. (list or chart of differentiators)

CTA: Learn More

Convert

Yes No

Email #3

Our process

CTA: Get started

Convert

Yes No

Email #4

Case studies and testimonials

CTA: Still not convinced? Check out our case studies.

Convert

Yes No

Email #5

Contact one of our Lima One associates to see what your options are. We're here to set you up for success!

CTA: Contact us

Convert

Yes No

Exit Email Workflow

incentivized campaigns and promotional efforts.

Referral Program

This requires an Account Property that should have logic around “Number of Deals” and once that’s crossed a threshold of 3+ we can trigger this workflow. Will confirm feasibility tomorrow.

When a new user converts (opens a line of credit), they’ll be enrolled in the referral program email workflow that will trigger 30 days later. Emails will include information about the offer and describes how it works. Contacts will exit the workflow when they complete the goal of referral=yes.

Email #1

Thanks for being a loyal customer, here’s information about our referral program.

CTA: Sign-up

Email #2

Don’t forget about our referral program. Here’s new information.

CTA: Sign-up

Sign-up

No

Exit Email Workflow

I love this ….. Lets run with this. How can we use HubSpot to write logic back to Salesforce in this instance?

Segmentation

This will work as a "catch-all" for contacts who come into HubSpot without a persona/program of interest known, and will ensure if a new contact comes in to the CRM in the future without a program of interest know, we can still segment them into the proper lists. Contacts will exit the workflow when the program of interest (POG is known).

Email #1

What programs are you interested in?

1. FixNFlip
2. Rental
3. Multi-family
4. New Construction

Email #2

Value prop of each program. Reminder, what are you interested in?

1. FixNFlip
2. Rental
3. Multi-family
4. New Construction

POG known

No

Exit Email Workflow

Reliant on Account properties —- Will confirm feasibility, tomorrow with Claire. Is the recommendation to be create a timestamp of "Time since last deal" for Accounts or for Leads its time sitting in "Contacted & Qualified" Lead Status.

Reengagement

Email #1 - 3 months

It's been a while.
Let's talk about your next big deal! Here's what we have to offer.

CTA: Get Started

Convert

Yes No

Email #2 - 6 months

Here's a promotion to get you going.

CTA: Learn More

Convert

Yes No

Email #3 - 9 months

We get it, life gets hectic. Talk with one of our pros and see what new options and opportunities we have available for you.

CTA: Speak with a Rep.

Convert

Yes No

Email #4 - 12 months

One last chance.

Here's a promotion to get you going.

CTA: Get Started

Convert

Yes No

Exit Email Workflow

Evergreen Campaign

This includes incentivized campaigns and promotional efforts.

Additional Recommendations

Cross Sell Promotion Workflows

Opportunities to cross or upsell different services based on current loan status and investment history. We'll likely want to prioritize where our biggest opportunities are first since the cross sell opportunities may be extensive, but a few ideas include emailing those who just paid off FixNFlip asking what their next deal is, or upselling FixNFlip as an option for current FixtoRent contacts, etc.

Renewal Workflow

Send notifications and reminders when a line of credit is about to expire asking them to renew and what their options are.

Marketing Qualified Education Notification

Communication for this type of contact is likely a monthly email with education/resources on how to boost their current status to become qualified. However, after being deemed not qualified, we may wish to send over some resources from the start so they know that we aren't leaving them high and dry and that we're here to set them up for success.

Additional Recommendations

Internal Communication Workflows

While these may not require design email communication or content, we may wish to automate some of the internal communications to ensure your sales team is getting the right messages as the right time, and aren't having to spend time doing tedious tasks. This may include setting a contact owner, creating a task, sending an intro email to new contacts, setting up a reminder to reach out in 3 months, etc. when a lead has been engaging with our content

Inquiry + Account Email

There is currently an email that is sent after a contact submits the form on the website. I think we can rework this communication to be more clear: "Thanks for your inquiry, we'll be in touch shortly. Set up your account in the meantime. Here's why you should set up an account."

Email Subscribe Email

There is currently an email that is sent after a contact submits the newsletter form on the website. However, to help segment our audience and ensure we're sending relevant information, we'll want ask what their topics of interest are. Create a Typeform survey that integrates with HubSpot where they can select their topics of interest so we can enroll them in the right lists and send them tailored content.

Additional Recommendations (cont'd)

Lead Scoring Set Up

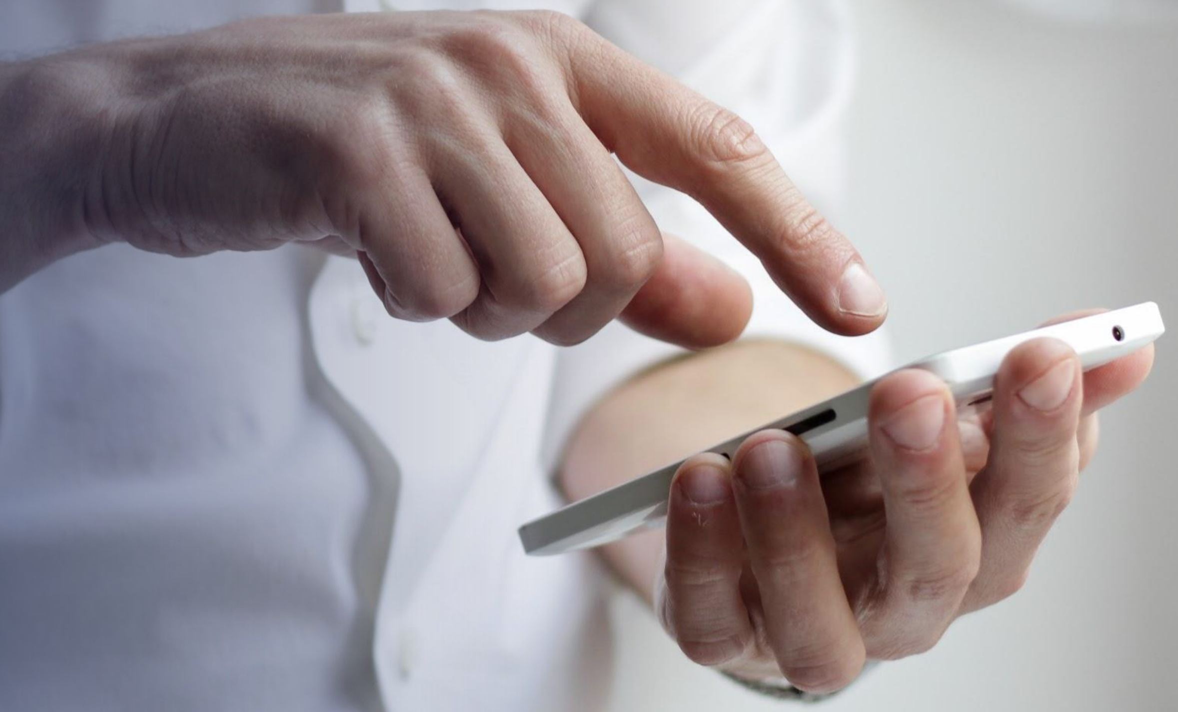
Lead scoring is the process of assigning values, in the form of numerical "points," to each lead generated. This process helps sales and marketing teams prioritize leads, respond to them appropriately and increase the rate at which those leads become customers. We will score your leads based on multiple attributes, such as Borrower Tier, Total Number of Assets Owned, Number of Rental Units, etc.

Landing Pages (copy, design, set up)

Use these landing pages for ads so we're able to target based on service line.

1. General Lima One landing page with information of all services. General contact form.
2. FixNFlip specific landing page with value props, testimonials, etc.
3. Rental specific landing page with value props, testimonials, etc.
4. Multi-Family landing page with value props, testimonials, etc.
5. New Construction landing page with value props, testimonials, etc.

Thank You.



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