Market Center Sites 3.0

Quick Start Playbook

In this playbook, we use green, yellow, and red circles to notate how actions take place within the system. This helps you understand each step in the process.

🟢 **AUTOMATION**   🟡 **OUTSIDE ACTION**   🔴 **LEADER ACTION**

AUTOMATION 🟢
When you see the green circle in a playbook, that means the step has automation in it. If the dot is on the left, a recruit enters through automation. If it's on the right, they exit through automation. Green means the system is going to work and taking action for you!

OUTSIDE ACTION 🟡
When you see the yellow circle in a playbook step, that means an external party takes action. This could be an agent submitting a possible recruit through the platform, or the recruit taking an action such as submitting information or booking an appointment. Yellow on the left means entering through action, while on the right means exiting.

LEADER ACTION 🔴
When you see the red circle in a playbook step, that means the assigned leader within the system takes action. This could be moving the recruit to another step, taking attendance after an appointment, or taking some other action. The great news is that the system does the VAST majority of tasks, allowing you to buy your time back and scale more effectively.

LEFT VS RIGHT 🟢🟢
Each stage will display two colors to the right of the stage name. The LEFT color is the most likely way a recruit ENTERS the stage while the RIGHT color is the most likely way for a recruit to EXIT the stage.

Long Term Nurture Playbook

> ◉ This breaks down the stages located in the **Long Term Nurture** pipeline to help you understand the lead flow at each step.

🟢 **AUTOMATION**   🟡 **OUTSIDE ACTION**   🔴 **LEADER ACTION**

NOT IN SCHOOL (NS), IN SCHOOL (IS), LICENSED AGENT (EX) 🟡🟢

These three stages provide a centralized system for long-term follow-up with recruits, allowing leaders to maintain engagement based on recruit type while tracking progress with automated cadence reminders and auto-expire settings. While in this stage, recruits are added to a follow-up cadence based on the setting in their recruit card (Weekly, Bi-Weekly, Monthly, or Quarterly), and it lasts according to the Auto-Expire setting within the recruit card (3, 6, or 12 months). The leader will receive reminders according to the assigned cadence to maintain follow-up. Once Auto-Expire reaches 30 days, the Opportunity is moved to the Expired Nurture stage and the assigned leader is prompted to determine next steps.

EXPIRED NURTURE (LAST 30 DAYS) 🟢🔴

This stage serves as a final 30-day window for long-term nurture recruits who have reached the end of their Auto-Expire period, giving leaders the opportunity to take action before the recruit is automatically dropped from the pipeline. At this stage, the leader should review the Cadence and Auto-Expire values, adjust them if necessary, and move them back to the appropriate NS, IS, or EX stage if they wish to continue outreach. Otherwise, the recruit is automatically dropped from the pipeline and no further communication will take place.

EXIT PIPELINE 🔴🟢

This is a holding stage that a recruit enters briefly when moving between pipelines but starting in the Long Term Nurture Pipeline. Make sure to use the Exit Pipeline process to make sure a recruit doesn't end up in the Holding Stage. Use this process to move a recruit from the LTN pipeline to the related applicable pipeline.

HOLDING STAGE 🟢🔴

If a recruit ends up here, it's typically due to an error when moving the recruit between pipelines. When this happens, an internal notification will be sent to the assigned user with details pertaining to the why the recruit landed here, along with pertinent information pertaining to the recruit, where they were coming from, and where they were headed.