

MODULE 5

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CLIENT ONBOARDING

Trackers Introduction

HAVE A KNOW-HOW OF THE TRACKERS



TOPICS

- MY LEADS TRACKER
- P. STACKS
- M. DATABASE
- M. BANK
- PRE-QUALIFIED LEADS



TRACKERS | MY LEADS TRACKER

- The CA will put the relevant information of interested leads on column A-H; leads that are up for sales call. Then your sales team or person in-charge for client calls will do the calls and fill out columns I-K.

LG Tracker 2021

docs.google.com/spreadsheets/d/1V16PZlxcxhx7B-NYs19b-MBPDU2QrITu/edit#gid=569792836

LG Tracker 2021 .XLSX

File Edit View Insert Format Data Tools Help Last edit was seconds ago

100% £ % .0 .00 123 Default (Ca... 12 B I A

R12

	A	B	C	D	E	F	G	H	I
1	LEAD TRACKER								
2	How to use: Once a connection becomes a lead, Campaign Assistant fills out columns A- H, Datachef / David fills out (and follows up with) Column I-K. Colour-code your leads to help, ie: colour a row in grey if they are lost, and green if they are up for a sales call.								
3	Note: Hover your mouse over the Headings for a more detailed description of what they mean								
4	Feel free to add more columns for the rest of your sales process								
5	No.	Date Recorded	Campaign	First Name	Last Name	Email	Phone Number	Message Type	Message Received
6									
7									
8									
9									
10									
11									
12									
13									
14									
15									
16									
17									
18									
19									
20									

Goals + Planning Dashboard My Lead Tracker P. Stacks M. Database M. Bank Pre-Qu Explore

TRACKERS | P. STACKS

- This will contain the engagements done by your CA with the people, groups, or pages that you connect with and/or follow. It includes links of liked, commented, and shared posts. You can put your feedback in column F with regards to the listed engagement.

	A	B	C	D	E	F
1	Date	Task	No.	Link	Comment/caption	Feedback
2						
3						
4						
5						
6						
7						
8						
9						
10						
11						
12						
13						
14						
15						
16						
17						
18						
19						
20						
21						

TRACKERS | M. DATABASE

- The CA will input important details of leads who accepted your connection invite.

The screenshot shows a Google Sheet titled "LG Tracker 2021" with the following content:

Row 1: A1

Row 2: Step 1: Once a connection accepts, input DATE they accept into column D (connected), the rest of the 'Advanced Connection Flow' will populate based off of our recommended gaps between messages.

Row 3: Step 2: The cells will light up in a corresponding colour if they are due to do TODAY, and will highlight in RED if they are overdue. Type an X next to the date once you have done the activity.

Row 4: Step 3: The table to the right will track the number of messages you have sent TODAY. WATCH THIS VIDEO for a more detailed EXPLANATION

6	Location	First Name	Last Name	Email/Contact site	Phone	Organization - Job Title	Organization - Name	LinkedIn URL	Endorsement	Connected	Intro
7											
8											
9											
10											
11											
12											
13											
14											
15											
16											
17											
18											
19											

TRACKERS | M. BANK

- This is a track of messages extracted from LinkedIn. Herein, the CA will fill out columns A-D for the leads' responses. In column E, you will place your reply suggestions and the CA will copy and send it to the corresponding leads.

The screenshot shows a Google Sheets spreadsheet titled "LG Tracker 2021" with the following table structure:

	A	B	C	D	E	F	G	H
1	Highlight legends	Done	To Send Email	Ian to respond	No actions needed			
2	Date	Name	Message Type	Message Received	Suggested Reply/Feedback	Action Taken	Approve d Reply	Lead
3								
4								
5								
6								
7								
8								
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18								

TRACKERS | PRE-QUALIFIED LEADS

- This is a CA's daily monitoring of the number of people sent with connection invites.

The screenshot shows a Google Sheet titled "LG Tracker 2021" with the following table structure:

	A	B	C	D	E	F	G	H	I	J
1	Date	No.	Name	LinkedIn PRef URL	<input type="checkbox"/>					
2					<input type="checkbox"/>					
3					<input type="checkbox"/>					
4					<input type="checkbox"/>					
5					<input type="checkbox"/>					
6					<input type="checkbox"/>					
7					<input type="checkbox"/>					
8					<input type="checkbox"/>					
9					<input type="checkbox"/>					
10					<input type="checkbox"/>					
11					<input type="checkbox"/>					
12					<input type="checkbox"/>					
13					<input type="checkbox"/>					
14					<input type="checkbox"/>					
15					<input type="checkbox"/>					
16					<input type="checkbox"/>					
17					<input type="checkbox"/>					
18					<input type="checkbox"/>					
19					<input type="checkbox"/>					
20					<input type="checkbox"/>					
21					<input type="checkbox"/>					

TRACKERS | MONTHLY TRACKER

- This will show you the progress of your Campaign Assistant in performing lead generation on a daily basis. This sheet is presented per month. Herein, the CA will fill out the daily performed KPI with totals of per messages sent, likes, comments, status update, and articles shared.

JUNE TRACKER		1 Jun	2 Jun	3 Jun	4 Jun	5 Jun	6 Jun	7 Jun	8 Jun	9 Jun	10 Jun	11 Jun	12 Jun	13 Jun	14 Jun
ACTIVITY		Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon
LinkedIn in Focus															
Connections	50														
Introductions	20														
LI Lead Message	20														
Booster Message	12														
Follow Up Message	10														
Booster #2	6														
Likes	10														
Comments	5														
Status Update	1														
Article	1														