

Contact Management

- a. Create your 90-day contact plan.
- b. Categorise each contact as per your plan.
- c. Schedule follow up meetings/ calls.

Sales Pipeline Tracking

- a. Determine pipeline stages.
- b. Assign probability for each stage.
- c. Create a visual pipeline dashboard.

Marketing

- a. Create your email marketing plan.
- b. Schedule regular communication.
- c. Monitor behaviour/clicks etc.

Administration Tasks

- a. Synchronise billing with onboarding.
- b. Monitor support requests.
- c. Setup customer reminder tasks.



Customer Management

- a. Develop onboarding welcome sequences.
- b. Draw up an FAQ document.
- c. Create automated upsell and nurture sequences.