A black background with orange letters and numbers

Description automatically generated

**Sample Workflow Worksheet**

**Company Name:**

**Name Workflow: (**New Leads, etc.**)**

**Describe the Workflow:** Provide a definition of this workflow to help train the AI below.

**Example of “aged leads”**: This workflow focuses on reengaging individuals who have previously inquired about our services. The goal is to reignite their interest and get them excited about speaking with a representative again. The key here is to keep the tone positive and helpful, ensuring the customer feels valued and encouraged to take the next step and speak to a representative.

**Your Company Queue Number: (**Workflow queue line number here)

**Helpful Tips:** At the end of this document

**Workflow**

**Day 1**

**Call 1**

* **Call Time:** Immediately after record arrives from CRM “OR” at the beginning of the next day if record comes in outside of business hours. For manually uploaded CSV records, calls will begin at the time you specify.
* **Call Logic:** The first call to all new records will always use this script.
* **Script:** [Insert Call Script Here]
* **Voicemail:** Yes
* **Voicemail Script:** [Insert Voicemail Script Here]

**Call 2**

* **Call Time:** Two hours after the first call
* **Call Logic:** Do not make this second call if outside business hours.
* **Script:** [Insert Call Script Here]
* **Voicemail:** No
* **Voicemail Script:** N/A

**Day 2**

**Call 1**

* **Call Time:** 10:00 AM
* **Call Logic:** N/A
* **Script:** [Insert Call Script Here]
* **Voicemail:** No
* **Voicemail Script:** N/A

**Call 2**

* **Call Time:** Four hours after first call
* **Call Logic:** N/A
* **Script:** [Insert Call Script Here]
* **Voicemail:** Yes
* **Voicemail Script:** [Insert Voicemail Script Here]

**Day 3**

**Action:** (No calls scheduled)

**Day 4**

**Call 1**

* **Call Time:** 9:00 AM
* **Call Logic:** N/A
* **Script:** [Insert Call Script Here]
* **Voicemail:** Yes
* **Voicemail Script:** [Insert Call Script Here]

**Call 2**

* **Call Time:** Six hours after first call
* **Call Logic:** N/A
* **Script:** [Insert Call Script Here]
* **Voicemail:** No
* **Voicemail Script:** N/A

**Day 5**

**Action:** **Action:** (No calls scheduled)

**Day 6**

**Call 1**

* **Call Time:** 12:00 PM
* **Call Logic:** N/A
* **Script:** [Insert Call Script Here]
* **Voicemail:** No
* **Voicemail Script:** N/A

**Day 7**

**Action:** (No calls scheduled)

**Day 8**

**Call 1**

* **Call Time:** 10:30 PM
* **Call Logic:** N/A
* **Script:** [Insert Call Script Here]
* **Voicemail:** No
* **Voicemail Script:** N/A

**Call 2**

* **Call Time:** Five hours after first call
* **Call Logic:** N/A
* **Script:** [Insert Call Script Here]
* **Voicemail:** Yes
* **Voicemail Script:** [Insert Voicemail Script Here]

**ADD ANY ADDITIONAL DAYS…**

**Instructions for Customizing and Implementing the Sample Workflow**

Welcome! Follow these steps to tailor and implement your workflow using the sample provided. This guide will help you customize the fields to meet your business needs.

1. **Use the Sample as a Template**
   * Review the Sample Workflow and Scripts provided.
   * Begin by setting up the workflow with calls per day, etc.
   * Add the scripts for call connections and voicemails once workflow is completed.
2. **Customize the Workflow**
   * **Call Times and Logic**: Adjust call times and logic to align with your business requirements.
   * **Add Additional Calls Per Day**:
     + To increase the number of calls in a day, copy and paste the existing call structure into the desired time slots.
     + There’s no limit to the number of daily calls. Adapt the workflow to ensure optimal engagement with your leads.
3. **Submit your Completed Workflow to Support@2Xsolutions.ai**

**How and When to use Company Placeholders**

Company Placeholders are used to include specific information in your script that the AI will use to personalize the conversation with your customer. By adding placeholders, you allow the script to dynamically insert data for each individual lead, making interactions feel more tailored and relevant.

To use placeholders, add placeholder columns in your CSV file or API uploads. (Please see the formatting requirements for each option in the 2X back office.

For example, if you wanted to include the name of where your customer heard about you, you might add a column named **placeholder\_lead\_source**. The script could then use this information to create a more customized message. If the source was "ABC News," the script would insert this source into the conversation:

* Script: "Hi, Mr. Smith, you called in from ##**lead\_source##**."
* Result: "Hi, Mr. Smith, you called in from ABC News."

This approach enhances personalization in each call and ensures that relevant information is seamlessly integrated into the conversation.

**Important:** First name, last name, phone number, and zip code don’t need placeholders. These fields are automatically recognized when formatted as instructed for CSV uploads or in the API documentation.