

Plans & Drips

Research Compilation

Research Plan

Exploratory research sessions with external users

- Discovery (10-15 Participants) - Who did NOT use plans/drips
- Discovery (10-15 Participants) - Who currently use plans/drips

Formative research sessions with external users

- Initial Prototype (8-10 Participants)
- Iterative Prototypes (8-10 Participants) per iteration, at least 15 iterations total

Formative research sessions with internal users

- “Almost” final iterations of prototype
- Qualitative and quantitative feedback

Summative research sessions

- Beta testing (2 - 4 weeks)

Initial Discovery - Pain Points

- The learning curve for plans and drips kept users from adopting it
- Required time investment for said learning curve also not tenable
- Build-up/countdown is confusing, even with training
- Searching for a particular template is tedious
- Prefer to copy from template versus build from scratch
- Difficult to identify the general outline of any given plan or drip

Global Simplicity

- Combined the concept of drips and plans into one interface
- Created a wizard format for creating templates
- Presented options and content incrementally to minimize cognitive load
- Combined the concept of To Do's and Reminders
- Settings moved to the end of the setup process
- Easier to understand options for settings

Search Page

- Clearer organization of templates
- Easy filtering and color-coded categories
- Card view and previews for at-a-glance information
- Emphasized process for editing templates vs creating new ones

The screenshot displays a search interface for templates. At the top, there is a search bar with the placeholder text "Enter a Keyword to Search for Templates...". Below the search bar are five filter buttons: "Type", "My Templates", "Blank Templates", "CINC Templates", and "PLIPS LIB Templates". The main content area shows a grid of template cards under the heading "General • 35".

Visible template cards include:

- CINC - Holidays**: 12 CALENDAR ITEMS CINC. Metrics: 0 Reminders, 12 Emails, 0 Texts.
- CINC - Canada Holid...**: 14 CALENDAR ITEMS CINC. Metrics: 0 Reminders, 14 Emails, 0 Texts.
- CINC - Speed to Lead**: 4 DAY CAMPAIGN CINC. Metrics: 0 Reminders, 3 Emails.
- CINC - Seller Showing**: 3 DAY CAMPAIGN CINC. Metrics: 0 Reminders, 3 Emails, 0 Texts.
- CINC - COVID New Buy...**: 10 DAY CAMPAIGN CINC. Metrics: 0 Reminders, 3 Emails, 3 Texts.
- CINC - COVID M...**: 10 DAY CAMPAIGN CINC. Metrics: 0 Reminders, 3 Emails, 1 Text.

A detailed view of the "CINC - Speed to Lead" campaign is shown in a modal window. It details a 4-day sequence:

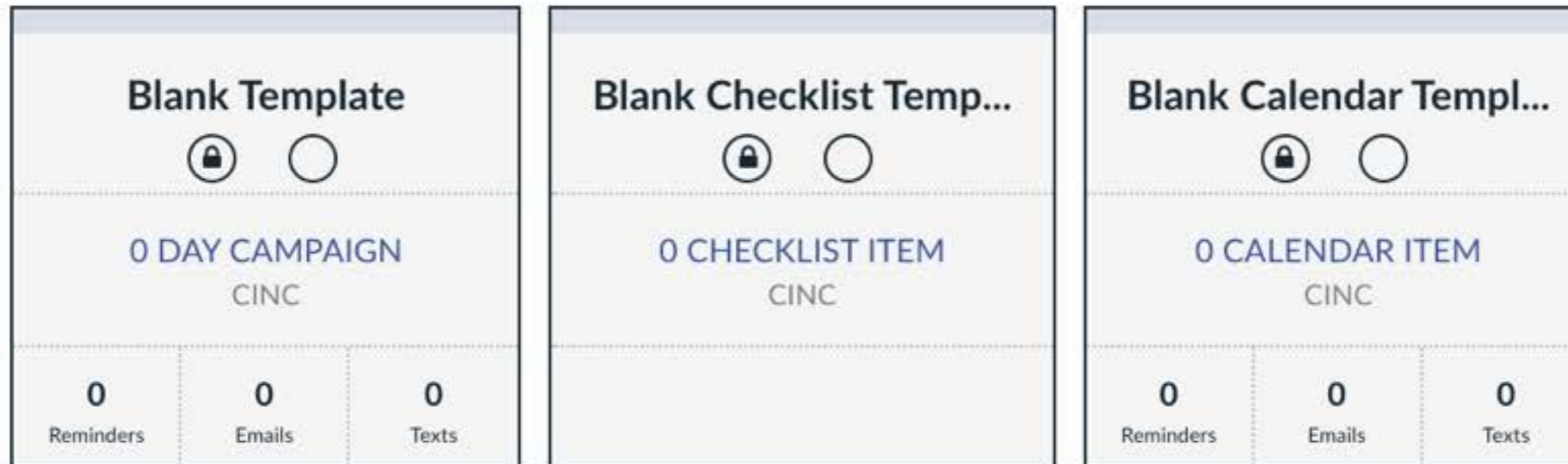
- Day 1**:
 - TEXT: Send immediately after Autotrack is applied. Text: Hi [FIRSTNAME], thanks for reaching out. Just curious, are you only looking in [FAVORITE CITY]? (I'll send an email t...
 - EMAIL: Send 10 minutes after previous step is completed. Subject: Properties in [FAVORITE CITY]
- Day 2**:
 - TEXT: Send at 8:30 AM. Text: Hey [FIRSTNAME], did you get the listings I sent over to you recently? May have gone into your junk/spam...
 - EMAIL: Send at 11:00 AM. Subject: What did you think of the listings?
- Day 3**:
 - EMAIL: Send at 8:00 AM. Subject: How's your home search going?
 - TEXT: Send at 2:00 PM. Text: Hi [FIRSTNAME], did you have any questions about the [FAVORITE CITY] listings that I sent over? Let me know. Th...
- Day 4**:
 - TEXT: Send at 9:00 AM. Text: Hi [FIRSTNAME], just wondering... Did I drop the ball? I haven't heard back from you in regards to your home search.

At the bottom of the modal, there are two buttons: "Browse more Templates" and "Copy this Template".

Template Types

Provided template types based on user scenarios






- Sequence Campaign
- Calendar (Date Based) Campaign
- Checklist



Checklist

- Ability to create checklists
- Created a “due in X days/weeks” instead of “due on”
- Simplified reordering

Checklist - 2 Items

I am the first item on this checklist Yay	 Woot	Due in 4 Days 
I am the second item on this checklist Hooray	 Aw yeah	Due in 5 Days 
 ADD CHECKLIST ITEM		

Sequence AutoTracks

- Presented steps in a day format to quickly grasp scope of AutoTrack
- Simplified approach to editing/deleting steps
- Organized step row to outline relevant details
- Easy way to add and reorder steps
- Easy way to add and rename days
- Adjustable lead types

Day 1 ▼

- Edit Day
- Add Step
- Remove Day

EMAIL

1. Select Lead Type

- Everyone
- Buyer
- Seller
- Buyer & Seller
- Recruit

Day 1 ▼

TEXT	Send immediately after AutoTrack is applied	Text: Hi [FIRSTNAME], thanks for reaching out. Just curious, are you only looking in [F...
EMAIL	Send 10 minutes after previous step is completed	Subject: Properties in [FAVORITE CITY]

Day 2 ▼

TEXT	Send at 8:30 AM	Text: Hey [FIRSTNAME], did you get the listings I sent over to you recently? May have ...
EMAIL	Send at 10:00 AM	Subject: What did you think of the listings?

Day 4 ▼

TEXT	Send at 8:00 AM	Text: Hi [FIRSTNAME], Just wondering... Did I drop the ball? I haven't heard back from ...
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+ ADD STEP

+ ADD NEW DAY

Scheduling Options

- Ability to create contingencies among reminders (blocking reminders)
- Ability to trigger “next” task based on whether the previous task was completed
- Option to send communications at a specific time, or specified timeframe

Set as a blocking reminder

Set Schedule

Send after Previous Step is Completed

Hours Minutes
Send message 00 : 10 after the previous step is completed.

Set Schedule

Send after Previous Step is Completed

Send at Specific Time

Set Specific Time

10 : 00

AM PM

TEXT Send immediately after AutoTrack is applied

EMAIL Send 10 minutes after previous step is completed

Scheduling Options (cont'd)

- Clear validation to indicate conflicts in scheduled communication
- Option to exclude communication on weekends and holidays
- Adjustable communication windows

The image displays a scheduling interface with several key components:

- 2. Select Communication Time:** A panel with four options:
 - 8 AM - 5 PM, Monday - Friday
 - 8 AM - 8 PM, Monday - Friday
 - Include Saturday and Sunday
 - Skip Holidays
- Send at Specific Time:** A section with a checked radio button and a time picker set to 10:00 AM.
- Send after Previous Step is Completed:** A section with a checked radio button and a time delay picker set to 00 hours and 10 minutes.
- Day 2 Schedule:** A list of communication items:
 - TEXT: Send at 7:30 AM (highlighted with a red box)
 - EMAIL: Send at 10:00 AM (disabled)
- Day 3 Schedule:** A list of communication items:
 - EMAIL: Send at 7:00 AM (highlighted with a red box)
 - TEXT: Send at 1:00 PM (disabled)

Calendar AutoTracks

- Option to create holiday based campaigns
- Option to send communication “x” days before or after a given holiday
- Ability to create holiday campaigns based on year
- US and Canadian holidays available
- Ability to select lead type
- Able to add custom dates

1. Select Lead Type

Everyone

Buyer

Seller

Buyer & Seller

Recruit

Set Specific Time:

07 : 00

AM PM

Send 00 day(s) before after the selected day.

CINC - Holidays

12 CALENDAR ITEMS
CINC

0 Reminders	12 Emails	0 Texts
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CINC - Canada Holid...

14 CALENDAR ITEMS
CINC

0 Reminders	14 Emails	0 Texts
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Custom Dates or Fields

Choose Date

Custom Field

Settings

- Appended to the end of the workflow instead of the beginning
- Clearer presentation of start and stop triggers
- Ability to restart current AutoTrack or daisy-chain others
- Simplified method of editing permissions for other agents

I'm the best test.

General

Triggers

Select a trigger to **START** your AutoTrack.

I want to start my AutoTrack...

With a Label

Buyer Nurture

Or, with a Pipeline Stage

Lead: Contacted

Or, with a Landing Page

Select Landing Page

Or, with a Custom Field

Select Custom Field

And, with a Source

And Sources are used...

Select a trigger to **STOP** your AutoTrack.

I want to stop my AutoTrack...

with a Label

Select Label

Or, with a Pipeline Stage

Select Lead Pipeline Stage

Or, When Lead Replies/Reaches Out

Select what happens when your AutoTrack **COMPLETES**.

Take No Further Action

Automatically Start Another AutoTrack

Search AutoTracks

Automatically Restart This AutoTrack

Permissions

Review AutoTrack

- AutoTrack content preview
- Outlines applied settings
- Preview of all steps in the AutoTrack

I'm the best test.

● General


1 DAY CAMPAIGN	2 REMINDERS	0 EMAILS	0 TEXTS
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- You set **everyone** as your lead type and communication will occur from **8am - 5pm, Monday - Sunday**.
- Your **START** triggers are:
 - When the label **Buyer Nurture** is applied
 - When the **Lead pipeline** is set to **Contacted**
- Your **STOP** trigger is:
 - When the **lead replies** to a communication
- This AutoTrack template is **editable by 0 team members** and **private** to other team members.

Day 1

REMINDER	Send immediately after AutoTrack is applied	Remind Buyer's Agent : yeah
REMINDER	Send 36 minutes after previous step is completed	Remind Buyer's Agent : dsfasdfsd

Saved **Successfully**



[Publish This AutoTrack](#)
[Exit Wizard](#) [Make Another AutoTrack](#)

Overview Page

- At-a-glance callouts to indicate total, active and paused AutoTracks
- Card views with high-level details of AutoTracks: Status, Leads, Touches and Steps
- Ability to drill down and access list of leads applied to a given AutoTrack
- Functionality to change status of an AutoTrack, depending on permission levels
- Filtering options by category

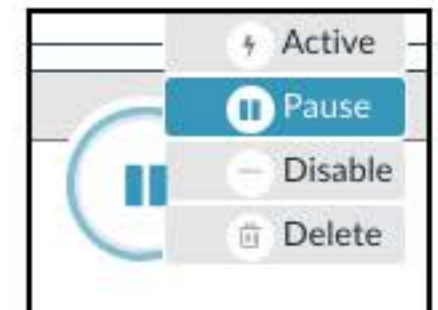


● [Blank Template Copy](#)

Duration: 88 Days
Public (Otter Tracks)

Active (Lightning Bolt Icon) | Leads: 2 | Completed: 0 | Touches: 3 | Steps: 3

Status	Lead	Progress	Date Assigned	Open Rate	Click Rate	Agent Assigned
Active	Skifree Yeti	1 of 3	8/26/2020	0%	0%	Automation Broker
Active	Bubba Chump	1 of 3	8/26/2020	0%	0%	Otter Tracks



Lead Details Page

- Presentation of AutoTrack mimics the design on the template builder
- Collapsed View (Header) - High level details (Name, status, progress bar, applied date)
- Expanded View - Presents contents of the AutoTrack with limited editable areas
- Each step details the scheduling information, assigned to, previews and timestamps
- AutoTracks tab to separate existing campaign with new ones
- Use of iconography to indicate the status of any given step

The screenshot shows the 'Blank Template Copy' AutoTrack in an expanded view. At the top, it has a 'General' tab and a progress bar indicating 'Active • 1 of 3 steps completed' with a start time of 'Started: Aug 26, 2020 at 2:39 PM'. Below this, it lists three steps:

- Day 1:** A 'Text' step with a 'Preview' link, marked as 'Completed' with a timestamp of '8/27/2020, 6:58 AM'. The scheduling information is 'Send on 8/27/2020, at 7:00 AM' with 'To: Lead' and 'From: Automation Broker'.
- Day 60:** An 'Email' step with a 'Preview' link, marked as 'Not Started'. The scheduling information is 'Send on 10/25/2020, at 7:00 AM' with 'To: Lead' and 'From: Automation Broker'.
- Day 88:** An 'Email' step with a 'Preview' link, marked as 'Not Started'. The scheduling information is 'Send on 11/22/2020, at 7:00 AM' with 'To: Lead' and 'From: Automation Broker'.

The screenshot shows a list of AutoTracks under the heading 'AutoTracks' with a '+ Apply an AutoTrack' button. Three items are visible:

- Blank Template Copy:** 'General' tab, 'Active • 1 of 3 steps completed', 'Started: Aug 26, 2020 at 2:39 PM'. It has a lightning bolt icon and an upward arrow.
- Remememberssss:** 'General' tab, 'Completed • Oct 6, 2020 at 7:33 AM', 'Started: Oct 6, 2020 at 2:49 AM'. It has a checkmark icon and an upward arrow.
- Label 002:** 'General' tab, 'Completed • Aug 27, 2020 at 12:40 PM', 'Started: Aug 27, 2020 at 12:40 PM'. It has a checkmark icon and an upward arrow.

That's it!

Launch MVP

...and commence summative testing :)