

DELUXE AUTOMATION DETAILS

If you want to go beyond general automation, then you WANT Deluxe automation. This will take your Arise process to the next level.

You will NOT have to move candidates from list to list. Your system will do it for you.

In fact, there are NO LISTS.

This does require at least 4 key applications within the Zoho platform.
If you have any questions on pricing or need suggestions:

*(Please contact Key McCorkle via email
(keymccorkle@allthingsibo.com) or Facebook Messenger (Key
McCorkle ALONJA)*

A deluxe automation set up will do the following:

Send a detailed application automatically to those that submit a preliminary application.

Screen the applicants based on preset disqualifiers

Emails are sent automatically based on the answers submitted. (Either registration steps with your IBO & CSP info included or rejection email)

You will process the platform onboarding as normal. Then manually add them to 1 module in your CRM.

Send ALL of your documents that require signatures with a few button clicks.

Your core documents (W9, Direct Deposit, contracts, etc) are templated for easy signature requests.

They are attached to your agent's profile within your CRM database

*****THIS IS THE OPTIMAL HANDS-OFF PROCESS*****

- ❖ *No need to send repeated emails.*
- ❖ *Have all of your vital business practices in one place.*
- ❖ *Get your documents signed, applications submissions are sent to via email.*
- ❖ *You receive 2 applications (A preliminary one found on your website and an interview replacement one, that will screen the “non-serious” applicants out)*
- ❖ *You simply provide your completed contract, we will provide and template the rest (Summary of Understand (mini contract), W9, Direct Deposit and a work from home checklist)*

Start working smarter not harder. Get hands off so you can focus on other business task.

