

GENERAL AUTOMATION DETAILS

A general automation for an IBO allows you to remove the need to manually processed application submissions repetitively.

By automating your system it will allow for you to be somewhat hands off with the onboarding of new agents.

In to have successful automation you will need to have a paid Zoho enrollment for at least 4 key applications.


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An 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 once applicants are moved to a certain contact lists. (A detailed guide is provided to follow the process)



Applicant details are sent to your CRM database for optimal organization

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

- ❖ *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.

