

CONVOS NEW MEMBER GETTING STARTED CHECKLIST

Thanks for being a member of Convos by Snappy Kraken! Use this checklist to help you Get Set Up, Get Noticed, and Get Going with your new Convos account and start feeling the magic!

1 GET SET UP!

☐ Verify your number has been activated

This process can take 15 minutes to 15 days depending on your number.

☐ Watch Convos Learn It!

Watch our live Convos Learn It! Workshop. By the end of the workshop, you'll understand how to change your account settings, upload contacts, send texts, and increase awareness by launching an exclusive Convos Campaign.

[Watch it here.](#)

☐ Create a Test Group

It's best practice to always send yourself or your staff a text before you send it to anyone else. Upload your own number and staff number(s), then create a group called "Test". Send draft texts to your Test group to make sure you're happy with the message before sending it to clients and prospects.

☐ Add Your Scheduling App Link

Go to Settings and add your scheduler app under "integrations". This empowers you to easily copy and paste your appointment link into any text so that you quickly get clients or prospects on your calendar.

☐ Send Yourself a Test Campaign

Go to the Library and send yourself a test campaign to start feeling the magic!

☐ Add Contacts and Send the Opt-In Welcome Text

Use a CSV file to upload contacts. You'll need first name, last name, and phone number. Once you've added all your contacts to the right group, make sure you turn on the Opt-In Flow!



2 GET NOTICED!

☐ Add Your Phone Number to Your Email Signature

☐ Launch the Snappy Kraken Convos Text Opt-In Campaign

Use this campaign to let your contacts know over email and social media that you now have a textable number they can contact you through!

☐ Add the Convos Opt-In Widget to Your Website

Let people know your number is textable. When contacts visit your site from their phone they are automatically able to text your number through this widget.

☐ Add Your Phone Number to Your Social Bios

3 GET GOING!

☐ Send 1-2 Texts Each Week

Stay top of mind by sending relevant and helpful texts to your contacts to keep them engaged and keep the conversation going.

- Adopt texting for core business functions. Use texting for client relationship management: appointment reminders and to-do's such as signing documents or sending checks.

Our most successful members are getting the best results when they communicate openly with prospects and clients. Consistent and varied communication is key! Need help reaching that goal? Feel free to [schedule 1-on-1 time](#) with our Member Engagement Team.