

Studio Sync

A graphic element consisting of two overlapping, stylized arrow shapes pointing to the right. The top arrow is purple with a pink tip, and the bottom arrow is orange with a pink tip.

ONBOARDING GUIDE

Your Onboarding Journey

		
PHASE 1 ATTEND KICK-OFF CALL	PHASE 2 GATHER MATERIALS	PHASE 3 IMPLEMENTATION
• Join the Studio Sync Facebook Group • Add name to Dropbox Folder • Complete the following forms: • Sub-account form • Integrations & Branding • Custom Fields and Values	• Gather assets and place in Dropbox • Submit "Assets Complete" Form • Complete A2P Registration Solo (optional) • Book your 1:1 Call at least 24 hours after "Assets Complete" Form is submitted • A2P can be done on your 1:1 if you need support	• Book and attend the following calls: • FB Adds & 11 Step Enrollment Call • Onboarding & Upsell/ Frequency Call • Lead Nurture & Re-Enrollment Call



**TEST, PUBLISH
& CELEBRATE**




Studio Sync Setup Checklist

- ☐ COMPLETE A2P VERIFICATION
- ☐ CONNECT SOCIAL ACCOUNTS
- ☐ CONNECT FACEBOOK ADS
- ☐ CONNECT GOOGLE MY BUSINESS
- ☐ CUSTOMIZE REPUTATION WIDGET
- ☐ INSTALL CHAT WIDGET ON STUDIO WEBSITE
- ☐ CHECK/UPDATE CUSTOM VALUES
- ☐ CHECK/UPDATE TRIGGERS
- ☐ CHECK/UPDATE CUSTOM SNIPPETS/TEMPLATES
- ☐ ADD USERS & ASSIGN PERMISSIONS
- ☐ IMPORT CONTACTS
- ☐ DOWNLOAD STUDIO SYNC APP
- ☐
- ☐
- ☐
- ☐
- ☐

11-Step Enrollment Automation

- ☐ CUSTOMIZE TRIAL TRIGGERS/TAGS

- ☐ CUSTOMIZE FREE TRIAL CLASS REQUESTED EMAIL 1

- ☐ CUSTOMIZE FREE TRIAL BOOKED EMAIL 1

- ☐ CUSTOMIZE FREE TRIAL BOOKED EMAIL 2

- ☐ CUSTOMIZE FREE TRIAL BOOKED SMS

- ☐ CUSTOMIZE FREE TRIAL ATTENDED EMAIL 1

- ☐ CUSTOMIZE FREE TRIAL ATTENDED EMAIL 2

- ☐ CUSTOMIZE FREE TRIAL ATTENDED EMAIL 3

- ☐ CUSTOMIZE RE-SCHEDULE EMAIL 1

- ☐ CUSTOMIZE RE-SCHEDULE EMAIL 2

- ☐ CUSTOMIZE RE-SCHEDULE EMAIL 3

- ☐ CHECK ALL DATE TIMERS

- ☐ CHECK OPTIONAL ADDITIONAL TASKS

- ☐ CHECK OPTIONAL ADDITIONAL INTEGRATIONS
(Slybroadcast, Slydial, etc.)

- ☐ SEND TESTS

6 Week Onboarding Checklist

☐ **CUSTOMIZE TRIGGERS/TAGS (NEW STUDENT/RETURNING STUDENT)**

☐ **CUSTOMIZE EMAIL 1**

☐ **CUSTOMIZE EMAIL 2**

☐ **CUSTOMIZE EMAIL 3**

☐ **CUSTOMIZE EMAIL 4**

☐ **CUSTOMIZE EMAIL 5**

☐ **CUSTOMIZE TASK 1 (TEXT/CALL)**

☐ **CUSTOMIZE EMAIL 6**

☐ **CUSTOMIZE EMAIL 7**

☐ **CUSTOMIZE EMAIL 8**

☐ **CUSTOMIZE TASK 2 (TEXT/CALL)**

☐ **CHECK OPTIONAL TASKS:**
(Slybroadcast, Welcome Box, Send Recital Email, etc.)

☐ **CHECK ALL DATE TIMERS**

☐ **SEND TESTS**

Lead Nurture Sequence Checklist

☐ CUSTOMIZE TRIGGERS/TAGS

☐ CUSTOMIZE EMAIL 1

☐ CUSTOMIZE EMAIL 2

☐ CUSTOMIZE EMAIL 3

☐ CUSTOMIZE EMAIL 4

☐ CUSTOMIZE EMAIL 5

☐ CUSTOMIZE EMAIL 6

☐ CUSTOMIZE EMAIL 7

☐ CUSTOMIZE EMAIL 8

☐ CUSTOMIZE EMAIL 9

☐ CUSTOMIZE EMAIL 10

☐ CUSTOMIZE EMAIL 11

☐ CUSTOMIZE EMAIL 12

☐ CHECK ALL DATE TIMERS

☐ SEND TESTS

Upsell/Frequency Checklist

☐ CUSTOMIZE TRIGGERS/TAGS

☐ CUSTOMIZE EMAIL 1

☐ CUSTOMIZE EMAIL 2

☐ CUSTOMIZE SMS 1

☐ CUSTOMIZE SMS 2

☐ CUSTOMIZE EMAIL 3

☐ CUSTOMIZE SMS 3

☐ CUSTOMIZE EMAIL 4

☐ CUSTOMIZE EMAIL 5

☐ CUSTOMIZE SMS 4

☐ CHECK ALL DATE TIMERS

☐ SEND TESTS

Re-Enrollment/Re-Engagement Checklist

☐

CUSTOMIZE TRIGGERS/TAGS

☐

COMPLETE CLASS RECOMMENDATION SPREADSHEET

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CUSTOMIZE EMAIL 1

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CUSTOMIZE EMAIL 2

☐

CUSTOMIZE EMAIL 3

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CUSTOMIZE SMS 1

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CUSTOMIZE SMS 2

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CUSTOMIZE SMS 3

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CUSTOMIZE EMAIL 4

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CUSTOMIZE EMAIL 5

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CUSTOMIZE EMAIL 6

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CUSTOMIZE SMS 4

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CUSTOMIZE SMS 5

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CUSTOMIZE SMS 6

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CUSTOMIZE TASK 1

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CHECK ALL DATE TIMERS

☐

SEND TESTS
