

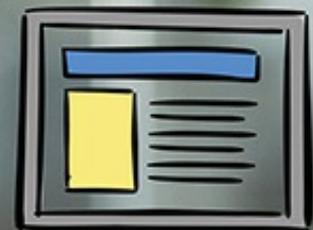
# SMART



## IM Checklists Volume 8



### MESSENGER MARKETING CHECKLIST 4 - AUTOMATION WITH KEYWORDS





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## Checklist 4: Automation With Keywords

Project Name: \_\_\_\_\_ Date: \_\_\_\_\_

		Yes	No
<p><i>Important - Before we get setup the default welcome messages, greeting message and main menu we should set up some flows and automation that we can connect those too.</i></p>			
1	In your ManyChat Dashboard in the left menu click on Flows.	<input type="checkbox"/>	<input type="checkbox"/>
2	In the top right click on + New Flow.	<input type="checkbox"/>	<input type="checkbox"/>
3	Enter Flow Name. Example name: First Welcome Chat Flow With Options <i>Important: Give each message and each flow you create a clean name so you can easily find and connect to in the future.</i>	<input type="checkbox"/>	<input type="checkbox"/>
4	Click Create	<input type="checkbox"/>	<input type="checkbox"/>
5	Click The Green "This Button" to create a new message.	<input type="checkbox"/>	<input type="checkbox"/>
6	Enter your first bot message. (Refer to Checklist #2, Part 4). Call this "First Welcome Chat With Options" for example.	<input type="checkbox"/>	<input type="checkbox"/>
7	Click Publish <i>*Do not add the quick replies yet.</i>	<input type="checkbox"/>	<input type="checkbox"/>
8	In the left menu, click on Flows again.	<input type="checkbox"/>	<input type="checkbox"/>
9	Click the + New Flow in the top right and name this "Free Report" and click create.	<input type="checkbox"/>	<input type="checkbox"/>
10	For now in the first message here just type Free Report Info. The idea is to build out the funnel first and return and fill in all the details later.	<input type="checkbox"/>	<input type="checkbox"/>

*Notes*



## Checklist 4: Automation With Keywords

- |    |  |                          |                          |
|----|--|--------------------------|--------------------------|
| 11 | Repeat the same for the Paid Product or whatever you wish you create a flow for. The steps again, Click Flows in the left menu, click new flow, enter a name and enter a basic first message.  | <input type="checkbox"/> | <input type="checkbox"/> |
| 12 | Repeat the same for Support Desk   | <input type="checkbox"/> | <input type="checkbox"/> |
| 13 | Return to Flow "First Welcome Part". (above Part 6) and click in the top right "Edit Message".   | <input type="checkbox"/> | <input type="checkbox"/> |
| 14 | Under the welcome message, you previously typed you'll see + Quick Reply. Click this and enter for Example Free Report. (do not close anything)  | <input type="checkbox"/> | <input type="checkbox"/> |
| 15 | You'll see options here. Click Start Another Flow.   | <input type="checkbox"/> | <input type="checkbox"/> |
| 16 | Click The Green Box "Start Another Flow Select a Flow To Start".   | <input type="checkbox"/> | <input type="checkbox"/> |
| 17 | Click to select a flow and choose the flow you created for the Free Report.  | <input type="checkbox"/> | <input type="checkbox"/> |
| 18 | Click the left arrow in the box beside where it says Start Another Flow.   | <input type="checkbox"/> | <input type="checkbox"/> |
| 19 | Again click + Quick Reply and repeat the steps to connect the reply to the flow. Type Special Offer, click start another flow, click select flow to start and choose that flow.  | <input type="checkbox"/> | <input type="checkbox"/> |
| 20 | Repeat the same for Support by adding another quick reply to the main welcome message and connecting it to that flow.  | <input type="checkbox"/> | <input type="checkbox"/> |
| 21 | Click Publish in the top right.  | <input type="checkbox"/> | <input type="checkbox"/> |
| 22 | Now I'll introduce you to the Funnel Builder. In the top right click Go To Funnel Builder and you'll see the view completely change into an easy to understand the flow. You can click on the small circles beside any message to continue adding more options. For this training, we'll be using the Basic Builder as the Funnels Builder can get confusing once you start adding more tags and actions which we'll get to later. | <input type="checkbox"/> | <input type="checkbox"/> |
| 23 | Let's complete the 3 flows that we created starting with the Free Report. If still on the Funnel Builder Screen click Open This Flow for the free  | <input type="checkbox"/> | <input type="checkbox"/> |

Notes



## Checklist 4: Automation With Keywords

report. If not, go to Flows in the side menu and you'll see it.

- |    |  |                          |                          |
|----|--|--------------------------|--------------------------|
| 24 | Click Edit Message in the top right and complete this funnel. Let's go over each step.   | <input type="checkbox"/> | <input type="checkbox"/> |
| 25 | Type out the first part of the message.<br><i>Example: Excellent choice, I've got a free report today on how newbie marketers can set up their business the right way from the start using free resources.</i>   | <input type="checkbox"/> | <input type="checkbox"/> |
| 26 | Below the message, you'll see lots of options like Text, Image, Cart, List, Delay, Etc. Click on Delay.  | <input type="checkbox"/> | <input type="checkbox"/> |
| 27 | A box will appear in the middle showing Typing 3 Seconds. You can edit this to 1 seconds by clicking on it.  | <input type="checkbox"/> | <input type="checkbox"/> |
| 28 | Ensure Checkbox "Show Typing during delay" is checked. This provides and more real experience.   | <input type="checkbox"/> | <input type="checkbox"/> |
| 29 | Type the next part of your message by clicking the Text icon below the message.<br><i>Example: This report has helped thousands of marketers and you're next.</i>  | <input type="checkbox"/> | <input type="checkbox"/> |
| 30 | Provide the link to the report. You can add a URL or upload a file. We'll upload a file for this example. Click on File and drag the PDF file into the box.  | <input type="checkbox"/> | <input type="checkbox"/> |
| 31 | Click on Delay again and add a 2-second delay.<br><i>Important: The options here are endless. You could more the subscriber into another series of messages which go out over a number of days. You can wait 1 minute and re-engage after they're read the report. You can show them a special offer related to the report. Think outside the box. For this example, we'll move to presenting them with a special offer.</i> | <input type="checkbox"/> | <input type="checkbox"/> |
| 32 | Add a delay for 30 - 60 seconds giving them time to check content. Uncheck typing on this page.  | <input type="checkbox"/> | <input type="checkbox"/> |
| 33 | Add a new Text and following asking them another question.   | <input type="checkbox"/> | <input type="checkbox"/> |

Notes



## Checklist 4: Automation With Keywords

*Example: What did you think of the report?*

- |    |  |                          |                          |
|----|--|--------------------------|--------------------------|
| 34 | Add 3 quick replies here starting with Quick Reply #1 - I Liked It   | <input type="checkbox"/> | <input type="checkbox"/> |
| 35 | Once clicked Connect to a new message offering them a special offer.<br><i>Example: I'm glad you liked the report. I've got a full video training course on this topic which I know will help you. Would you like to check it out along with a discount coupon code?</i>     | <input type="checkbox"/> | <input type="checkbox"/> |
| 36 | Add 2 Quick Replies. First Quick Reply for this is YES   | <input type="checkbox"/> | <input type="checkbox"/> |
| 37 | Once someone click YES send them to the Funnel you created for the Special Offer / Paid Product.<br><i>Important: I hope you're starting to see why we created these flows in the beginning and why it's easier to link to new Flows rather than continuing with the one</i> | <input type="checkbox"/> | <input type="checkbox"/> |
| 38 | Before we continue in Flows in the menu on the left, open in a new tab and create a new flow called Not Interested.  | <input type="checkbox"/> | <input type="checkbox"/> |
| 39 | We'll keep this basic for now knowing you can easily edit later, add other options, links to other products and again anything you wish. Type out the reply message.<br><i>Example: No problem. Have an awesome day. (use a different message if showing more options.</i>   | <input type="checkbox"/> | <input type="checkbox"/> |
| 40 | The important part here is adding quick replies to loop them back into the funnel and your offers so here for this example, we'll add two buttons. First, add a button called Start Offer.   | <input type="checkbox"/> | <input type="checkbox"/> |
| 41 | Link this to exciting flow which was the first welcome message.  | <input type="checkbox"/> | <input type="checkbox"/> |
| 42 | Create another button called support linking to the support low.<br><i>Important: Buttons and Quick Replies have the same options. The BIG difference is Quick Replies disappear once clicked and buttons will stay in the member.</i>                                       | <input type="checkbox"/> | <input type="checkbox"/> |
| 43 | Let's complete the remaining flows. Open the special offer flow, nothing, in this case, the visitor has clicked show me the special offer. Write out   | <input type="checkbox"/> | <input type="checkbox"/> |

Notes



## Checklist 4: Automation With Keywords

your first message.

*Example: Excellent choice. Right now we're holding a massive sale on our training for XYZ. As a thank you for visiting I would like to offer you a 50% discount by using Coupon Code: 1234  
Hit the button below to check it out.*

- |    |   |                          |                          |
|----|---|--------------------------|--------------------------|
| 44 | Add a link to your offer by adding a button to the message and linking to your website.   | <input type="checkbox"/> | <input type="checkbox"/> |
| 45 | Add another message offering support.<br><i>Example: If you've any questions hit the support link below.</i>  | <input type="checkbox"/> | <input type="checkbox"/> |
| 46 | Add another button linking to the Support Flow.   | <input type="checkbox"/> | <input type="checkbox"/> |
| 47 | Now let's complete the support flow where they can talk to a human and you get a notification. Go to the Support Flow and enter your first message.<br><i>Example. We're here to help and answer any questions you have. Would you like to visit our support desk or talk to a human?</i> | <input type="checkbox"/> | <input type="checkbox"/> |
| 48 | Add a button linking to your support desk ULR   | <input type="checkbox"/> | <input type="checkbox"/> |
| 49 | Add a button called Talk To A Human   | <input type="checkbox"/> | <input type="checkbox"/> |
| 50 | Add Action Notify Admin   | <input type="checkbox"/> | <input type="checkbox"/> |
| 51 | Add Text confirming you receiving the message.<br><i>Example: Thank you, I'll get back to you shortly.</i>  | <input type="checkbox"/> | <input type="checkbox"/> |

*Important: You've now completed several flows from start to finish which is an excellent foundation for whatever type of marketing bot you wish to create. Remember the options are endless and to think outside of the box.*

Notes



RESPONSIVE  
DESIGN

WEB DESIGN

# Thank You

**We Welcome Your Feedback**

feel free to get in touch with us for any  
feedback or questions