Sales Funnels & Success Automation 101

Here's where Voodoo automates your sales, marketing and customer service processes, helping you work smarter, not harder.

By Robert Cassard
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If you're in charge of marketing for your company, you <u>know</u> you can get more done, more effectively, by automating your routine tasks and your ongoing communication with prospects and customers. Where to start? Most online marketing automation systems are complex, expensive and scary. Some common automation platforms require multi-day training seminars just to get started.

Not Voodoo. Using this guidebook, the tools built in to your *Voodoo Campaign Manager*, and a little of your own creativity, you'll be automating many of your most challenging, time-consuming processes right away. For every hour or two you invest in Voodoo, you can save day or two of your valuable time — and get way more accomplished.

Voodoo *Sales Funnels* and *Success Automation™* simplify and standardize the process of growing your business. With our built-in features, you can:

- Create and embed **Contact Forms** to <u>capture new leads</u> from your website or any other web page.
- **Segment your Contact Lists** for targeted marketing and promotions.
- **Drip Market** to prospects and customers to educate in stages, build trust and sell more.
- Create personalized **Customer Experience Programs** to develop and nurture your clients over time through "touchpoints" at critical moments in the customer life-cycle.
- **Schedule newsletter broadcasts** in advance and deliver them on time every time.
- **Automate your response to event RSVPs**, sending information, reminders and follow-ups effortlessly.

Performance Tip: Think creatively. Voodoo allows you to do prospect and customer outreach 100% automatically, using any combination of individualized and personalized parameters. Broadcast your online content based on individualized wait times, fixed calendar dates and/or business-cycle trigger points like contract, warranty and policy expiration dates.

Drip Marketing Funnels

"Drip marketing" is a communication strategy that sends, or "drips," a pre-written set of email messages and other content to customers or prospects over time.

A good example is a **6-part series or "funnel" aimed at educating your target audience about a particular product or service** delivered once-a-week for 6 weeks. Drip marketing is generally far more effective than a one-shot campaign when you need to educate a group of people before they will feel confident making a purchase.

Drip marketing can also be effective in developing a long-term relationship with existing customers during the customer life-cycle as part of the Customer Experience Management (CEM) process. It can be used to thank customers, solicit their feedback, assess their satisfaction, inform them about ancillary products and related services (cross-selling), warn them about impending expirations, offer online re-enrollment options, and much more.

How to Build a Drip Marketing "Sales Funnel"

Let's revisit the example of 6-part funnel to educate a target group, in this case, C-Level Executives. This audience needs a high degree of TLC and communications finesse. You need to understand their challenges—what keeps them awake at night—to get and hold their attention. What's more, you need to educate them without bruising their egos and making them feel foolish.
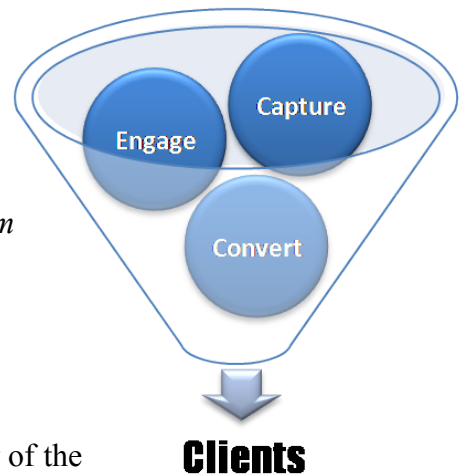
ONE: Create your Content.

This is the most challenging part of the process because the quality of the content will determine the effectiveness of your drip program. It's usually best to have the first email (#1) introduce the sender (yourself or the designated sales rep) and present the inherent value of the funnel contents to come.

The remainder of your email series (#2-5, in this case) should provide variety, value and intelligence, in a tone that's professional but not dry — executives are real people, too. It's often best to offer up a combination of video content, downloadable reports, a short survey, links to third-party verifications, news items, etc. While you should strive to avoid a "salesy tone" (the fastest way to "scare away" prospects), every email should contain the sender's contact info and offer easy ways to make contact.

Here's how: Visit your Email Templates area to create your content. Read through your email templates, create new templates or copy and modify existing templates that you would like to use in your funnel.

Email Templates

Label each email template with a number to indicate its order in the funnel's email sequence. This makes it easy to sequence your emails properly when building the funnel.

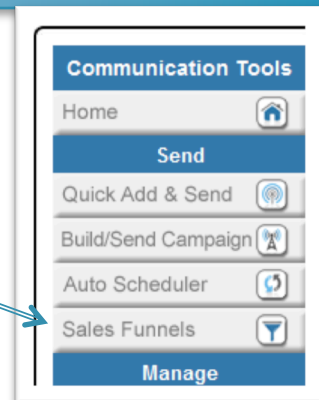|	ID	Name	Subject	Master	Public	Created Date	Preview	Copy	Edit	Delete
☐	21358	C-Level Executive Prospecting Email #1	New keys to investor satisfaction			8/1/2012	🔎	📑	✏️	✕
☐	21359	C-Level Executive Prospecting Email #2	Getting past short-term results			8/1/2012	🔎	📑	✏️	✕
☐	21360	C-Level Executive Prospecting Email #3	How to find out what your investors are thinking			8/1/2012	🔎	📑	✏️	✕
☐	21361	C-Level Executive Prospecting Email #4	The most satisfied group of shareholders			8/1/2012	🔎	📑	✏️	✕
☐	21362	C-Level Executive Prospecting Email #5	Securing your position with the board of directors			8/1/2012	🔎	📑	✏️	✕
☐	21363	C-Level Executive Prospecting Email #6	Time to take action			8/1/2012	🔎	📑	✏️	✕

Organize your funnel email templates by moving them to a separate folder, named after the Funnel. In this case, since the funnel will be called "C-Level Executive Prospecting Funnel," the Email template folder will look like this:

☐	6020 📁	C-Level Executive Prospecting Funnel Emails (6)	8/1/2012	✏️ ✕

TWO: Create and build your funnel.

Once your email templates and content are ready, click Sales Funnels on the left navigation menu.

Now **name your Funnel**, select or create an associated **Contact List**, and **set the "From" Name and Email address** the funnel will come from.

Communication Tools

Home 🏠

Send

Quick Add & Send 📶

Build/Send Campaign 📇

Auto Scheduler 🔄

Sales Funnels 🔻

Manage

Funnel Name: C-Level Executive Prospecting Funnel (ID: 2397)

Funnel Info | Emails | Contact Form | XML Code Sample | Reports | Statistics

Funnel Info

Funnel Name: ❓ [C-Level Executive Prospecting Funnel] ❓ ☐ Enabled
❓ ☐ Public (Allow team members to make copies of this Funnel)
Contact List: ❓ [C-Level Executive Prospecting Funnel List (0) ▾] Edit Add Remove
From Name: ❓ [Team Voodoo]
From Email: ❓ [support@voodooviral.com]
❓ ☐ Ask my permission before sending emails out automatically

💾 Save | Send to Pre-Existing Contacts | ✕ Close

Helpful Tips:

Add a new (empty) **Contact List** using the same name as the funnel itself, for example: *C-Level Executive Prospecting Funnel List*.

Some users find it helpful to add the word "List" or "Contact List," but it's not necessary.

NOTE: Always click **Save** after making any changes to the funnel or its settings!

THREE: Using the Emails Tab
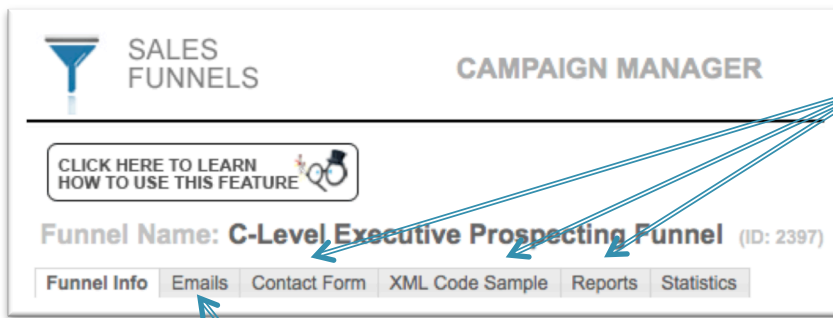
The tabs at the top of the Sales Funnel feature page are the "keys to the kingdom." They give you the ability to automate every aspect of your content delivery.

Select the **Emails** tab. It is here you will select which Email Templates you want to send and in which order. You will also set the Wait Times and/or Calendar Dates when each message should be sent. (You can mix and match Wait Times and Calendar Dates in the same funnel.)

To Send a series of Email Messages by Wait Time

A Sales Funnel's associated Contact List is a dynamic or "smart" list, that can include pre-existing names and accept new names from your choice of sources. *(Contacts can be added via manual upload, contact capture forms, or via XML notifications from external systems.)*

Whenever a new Contact enters the list, that contact's information is time-stamped. Wait Time indicates the number of days the system will wait before sending each email. *Wait Time is clocked from the original **Added Date**, the time a Contact is time-stamped into a Funnel List.*
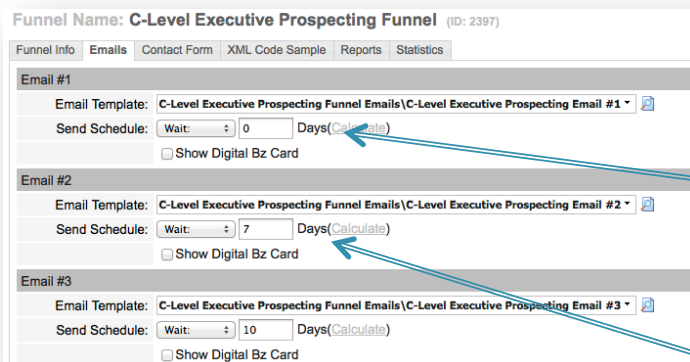
In this example, John Prospect's contact information enters a Funnel List on August 1 at 9:47 pm.

Funnel Email No.1 is scheduled with a Wait Time of 0 Days, meaning the email will be sent immediately with no effective wait time from the moment John's data enters the system.

Funnel Email No.2 is scheduled with a Wait Time of 7 Days, so the email will be sent 7 days after John's data enters the system (in this case, on August 7 at 9:47 pm).

By default, each Funnel setup offers up to six emails. If your strategy requires more, contact Voodoo and we can upgrade your Funnel structure.

NOTE: Remember to click **Save** after making these changes to the funnel and its settings.

To Send a series of Email Messages by Calendar Date

When needed, you can set fixed calendar dates on which your funnel will send specific content. This is vital when sending timely information such as newsletters, event reminders and time-based promotions.

When using calendar dates, all contacts present in the Funnel's Contact List will receive the designated email on that specific calendar date, regardless of when they were time-stamped into the funnel.

To set a Calendar Date trigger, choose **Send on** from the **Send Schedule** pull-down menu.

Click the **Calendar** icon and select the specific date.

Email Template:	Company Newsletter - January 15
Send Schedule:	Send on: ⇕ 08/15/2012 📅 at start time: 8:30 PM

Show Digit

◀ **August, 2012** ▶

Su	Mo	Tu	We	Th	Fr	Sa
29	30	31	1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18

#5

Email Template: --Select an Em

#6

Email Template: --Select an Em

Enter your desired start time in standard 12-hour format, for example: 8:30 pm. All times are referenced to Pacific Time (UTC-8).

Don't forget to

💾 **Save**

Once you select your email templates and finalize your send schedules, click **Save** at the bottom of the **Emails** tab page.

You MUST click Save or your changes and new settings will be lost.

Funnel Name: **C-Level Executive Prospecting Funnel**   (ID: 2397)

Funnel Info   Emails   Contact Form   XML Code Sample   Reports   Statistics

Funnel Info

Funnel Name: ?	C-Level Executive Prospecting Funnel	? ☑ Enabled
?	☐ Public (Allow team members to make copies of this Funnel)	
Contact List: ?	C-Level Executive Prospecting Funnel List (1)	Edit Add Remove
From Name: ?	Team Voodoo	
From Email: ?	support@voodooviral.com	
?	☐ Ask my permission before sending emails out automatically	

💾 Save   Send to Pre-Existing Contacts   ✖ Close

Enable the Funnel
Check the little box then Save.

You can now upload contacts to the Contact List associated with your funnel, and the system will immediately start sending and reaching out to your contacts on your chosen schedule.

Click **Send to Pre-Existing Contacts** *only if* your Funnel Contact List contained Contact data before you set up and Enabled your funnel.

Ready to achieve even greater success? Read on for our advanced features.

Triggering your Funnels from outside of Voodoo

The power of Contact Forms:
Capture leads from any webpage.
### *Enter contacts from any device, anywhere.*

Voodoo Contact Forms (also known as "Capture Forms") let you capture leads that populate directly into your Sales Funnel Contact Lists, then trigger email sends automatically.

For example, you can embed a Contact Form on any web page, and modify the graphic content of the form to match your website perfectly.

A Contact Form can also be a salesperson's tool to add contacts to your funnel lists quickly and on the go…from any web-enabled device. No need to log into Voodoo to add new contacts to a funnel list, just open a bookmarked Contact Form, fill out the fields and Submit.

Contact Form Basic Features and Setup

In general, the Contact Form tab gives you access to the basic setup elements, arranged from top to bottom. Visit each area to ensure you create everything you want and need for your form. Many Contact Form features are optional, as noted in the descriptions below.
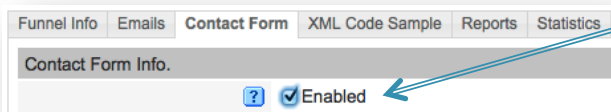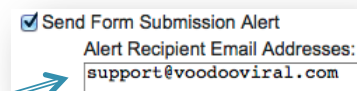
First, check the **Enabled** box so all Contact Form features become available, then click **Save** at the bottom of the page.
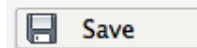
Send Form Submission Alert (optional):
Check this box to receive a detailed report via email each time a new contact is captured into the Contact List associated with this funnel. You can enter one or more email addresses, separated by a semi-colon (;).

*You can also click the **Statistics** tab to see all contacts that have been captured into the Funnel Contact List and everything that is cued to be sent and when. Alternatively, you can visit the Contact List itself using the Manage Contacts link to see all contacts that have been captured into the Funnel Contact List, export them on demand, etc.*

Promotional Code (optional):
If you enter a unique code here, Voodoo will allow the contact form to be submitted only if the user enters *the same* promotional code on the form. Leaving this field blank eliminates the promotional code feature on your Contact Form.

Contact Form URL:
This is the absolute
URL (web) address

Contact Form Url: [?] http://www.voodooviral.com/clients/getFunnelContactForm.aspx?ClientId=24&FunnelId=2397

that is associated with this specific funnel. Bookmark this address to have easy access to the Contact Form on any web-enabled device.
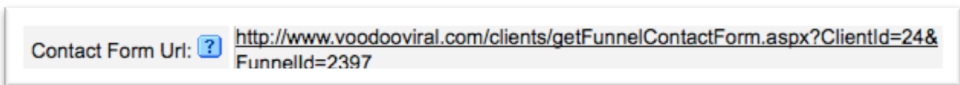
Page Header (optional):
This is the area at the top of
the capture form that is above
form header and the capture
fields.

In most cases, our clients choose to put some graphic content in this area (e.g., their logo or other custom branding). Full HTML editor included.
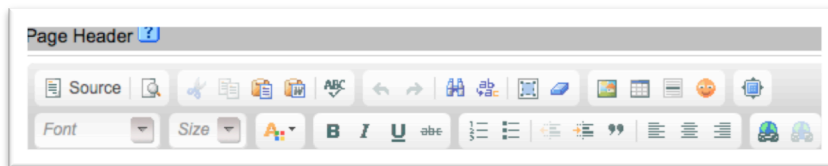
Form Header (optional):
This is the text in the area of the form just above the capture fields. If desired, you can add graphics, and change text size and colors as well. Full HTML editor included.

Form Submit Button Text (optional):
The button defaults to the word **Submit**, but you can change it to say whatever you like.

Form Input Fields:
The first column of checkboxes lets you choose which fields will be **Visible** on the form.
You can modify the field names in the **Label Text** column. What you type here is what your users will see on the final form and what will appear on your Funnel Reports.
You may change the order in which the fields appear on your form by using the **Sort** arrows to move fields up and down.
Choose which fields are Required by checking boxes in the last column. Required fields prevent the form from being submitted until they are completed.

Page Footer (optional):
This is the text in the area of the form just below the capture fields and Submit button. It is often used for legal disclaimers, social media links, or other signature information, such as physical address, phone number, etc. If desired, you can add graphics, and change text size and colors as well. Full HTML editor included.

Confirmation Page:
Selecting **Confirmation Setting→Redirect to a URL** will let you enter a unique URL (web) address. Use this feature when you want users to visit another web page upon submitting the form.
Selecting **Confirmation Setting→Display a Confirmation Message** lets you create a confirmation message in the box below. Full HTML editor included.

Voodoo Tips & Tricks
Create a super-fast mobile Contact Form for your own use.

Time required: Under 5 minutes
Benefits: A mobile Contact Form lets you add contacts to a Funnel Contact List and nurture
them automatically—from anywhere, on any device…without logging into Voodoo.

1. Check the **Enabled** box. You can't make changes until you Enable your form.

2. Type the purpose or name of your
funnel in the **Page Header** area, and
change the color and font size if you want.
Example:

3. Type a description in the **Form
Header** area that reminds you what this
form is connected to.
Example:

4. Change the **Form Submit
Button Text.** The button
defaults to the word **Submit**,
but you can get creative with
this, too.
Example:

C-Level Executive Prospecting Funnel

Entering a C-Level Prospect here will capture the contact and send six emails over the next 6 weeks.

First Name:

Last Name:

Email:

Phone:

Company Name:

Capture & Nurture This Contact Automatically

*Here's how a final
Contact Form looks.*

5. Choose your desired **Form Input Fields.** The
following settings are recommended for speedy
use when mobile or out in the field:

- First Name (Visible/Required)
- Last Name (Visible/Required)
- Email — automatically Visible/Required
- Phone (Visible only)
- Company Name (Visible only)

6. Confirmation Page:
Leave **Display a Confirmation
Message** enabled to show the default
message when you submit a new
contact.
Or you can get creative and have it say
something relevant to you, like this:

Nice work.

Your C-Level Prospect will now be nurtured automatically for the next 6 weeks.

ALWAYS REMEMBER TO CLICK **Save**
AFTER MAKING CHANGES TO YOUR CAPTURE FORM!

Save

Now, copy your **Contact Form URL** address and bookmark it!
Access your bookmark on any device to enter new contacts into your funnel.

Creating a Contact Form to embed in a Webpage

Maybe you want to capture new leads from a page on your website, or maybe your new promotion is driving traffic to a landing page… It's easy to customize and embed your Funnel Contact Form. When you do, your online prospecting efforts will "feed your funnels" and your leads can be nurtured automatically.

Here's a Contact Form created in Voodoo…

You already know how to build a Contact Form. Now let's explore Voodoo's "hidden" features that allow you to customize the graphic look of your forms to harmonize in every way with your website or landing page designs.

You're 1 Step Away From Experiencing The Magic…

First Name:
Last Name:
Email:
Company Name:

Send Me Voodoo

…then embedded seamlessly in a web page.

You're 1 Step Away From Experiencing The Magic…

First Name:
Last Name:
Email:
Company Name:

Send Me Voodoo

**This form's
Page Styles settings:**
_Page Body BG Color,
Page Header BG Color,
Form BG Color, Form
Header BG Color, Form
Field Label BG Color,
Form Button Panel BG
Color:_ **transparent**
Form Width: **550 pixels**
Form Button BG Color:
Red
Font: **Trebuchet MS**
Font Color: White

On the Contact Form tab of your Sales Funnel, you already have unlimited HTML graphic options for graphics and text in your Page Header, Form Header and Page Footer. But there's even more graphic flexibility under the hood.

Scroll to the bottom of the page and click the **Edit Page Styles** button.

Edit Page Styles

This opens up a wonderworld of options for all aspects of your form. _What do you want to change?_
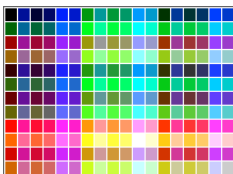
Click any field regarding **Color** and you'll see a color picker allowing you to select from a full range of web-compatible colors. Enter the word **transparent** to make any element completely see-through. Change Fonts, Sizes, Widths and more. Advanced designers can even enter **Custom CSS Code** in the box at the bottom.

Before you get overwhelmed, see the next page…

The key to Voodoo Page Styles:

If you haven't done it yet, get to know the Voodoo "Magic Man." You'll find him at the upper left corner of the **Page Styles** feature. Click the icon and…

CLICK HERE TO LEARN
HOW TO USE THIS FEATURE

You can stylize your information capture form.
This works especially well when using the form as an insert into your existing webpage (see below).

Color Selection
- Click inside the *Background Color* entry area to open up the color picker, or simply type in your own 6 digit color code.
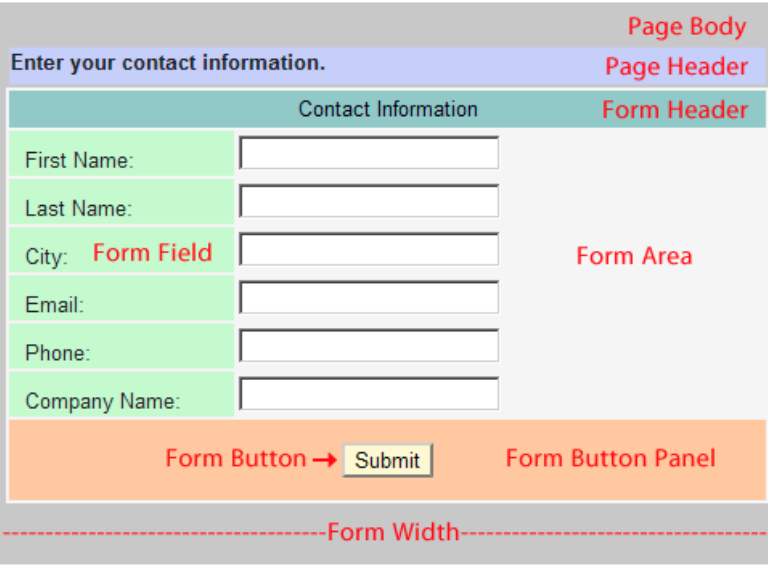
Background Images
- You can use a background image instead of a color for the Page Body & Page Header areas.
- Simply insert the absolute URL location of the image, e.g. http://www.voodooviral.com/images/insert-capture-form.jpg

Form Width
- You can choose the width of the form by entering in the number of pixels.
- Default form width is 700.

Preview
- Try different color styles and combinations, then click preview to check.

I-frame insert code - FOR WEB DEVELOPERS
- You can embed your Voodoo capture form in an exisiting webpage by inserting the following code.
- Make sure to change your *ClientID=* and *Funnelid=* to match your selected funnel contact form.
- You can also adjust the inserted iframe's width, height and border.

```
<iframe width="500px" height="320px" frameborder="0"
    style="border-collapse: collapse; border: 1px solid silver" src="http://www.voodooviral.com/clients
/getFunnelContactForm.aspx?ClientId=24&FunnelId=364"></iframe>
```

…you'll gain instant access to a key explaining the graphic terminology and a chart defining the form elements.

For web developers and advanced users, I-frame embedding/insert code instructions are included and can be cut-and-pasted right from the window, and used in your own webpage code by replacing the parameters shown in red.

Page Body
Enter your contact information.   Page Header

	Contact Information	Form Header
First Name:		
Last Name:		
City: Form Field		Form Area
Email:		
Phone:		
Company Name:		

Form Button → Submit   Form Button Panel

-----------------------------------Form Width-----------------------------------

Tip: While working on **Page Styles**, use the **Preview** button to review your results and experiment.
*Don't forget to click **Save** when you're finished!*

If that's not enough…

Populating Contact Lists and triggering Sales Funnels in Voodoo via XML Email Notifications

Voodoo can be used in conjunction with many current CRM, accounting, shipping and other databasing systems. *XML Notifications* are feature of Voodoo's Advanced Programming Interface (API). They make it easy for IT managers to set up real-time email notifications that populate Contact Lists and trigger actions in Voodoo.

Just a few examples:

Enter a **new opportunity in your CRM** and automatically have it populate to a *New Prospects Funnel List* in Voodoo. Your new prospect can automatically receive a designated series of personalized messages about your company and products, on their own personalized schedule.

When a **new purchaser enters your accounting system or online shopping cart**, have the customer populate into Voodoo for a *Post-Sale Customer Experience (nurturing) Funnel*. Over time, you can automatically thank them for their purchase, confirm they made the best choice, provide product usage instructions via video, survey them for feedback and customer satisfaction, solicit their referrals, and more.

Have your **shipping system notify Voodoo when items are ready to ship**. Your *Shipping Funnel* can reach out with fully trackable shipping notifications including your choice of video content, downloadable documents and instructions, shipping quality and speed surveys and more.

Visit the **XML Code Sample** *tab, and provide this information to the IT manager in charge of the system that will send notifications.*

The IT manager will set up your app to send a notification email in plain text format to: SalesFunnel@voodooviral.com.

Funnel Name: C-Level Executive Prospecting Funnel (ID: 2397)

| Funnel Info | Emails | Contact Form | XML Code Sample | Reports | Statistics |

To add new contacts to this sales funnel via email, your email message must be in the following format:

Message Type:	Plain Text
Message Subject:	Sales Funnel
Message Body: (replace the attribute values of the Contact tag with actual contact info)	`<ContactList  ClientId="24"  FunnelLoginId="8B996" FunnelId="2397" >` `<Contact  FirstName="ContactFirstName" LastName="ContactLastName" Email="ContactEmail@xyz.com"  CompanyName="ContactCompanyName" Notes="AnyNotes" />`
Recipient: (Send the message to this email address)	SalesFunnel@voodooviral.com

The message subject should always be: **Sales Funnel**

The message body should contain **exactly what's shown in the dynamically generated area**, replacing any parameters in quotation marks with data from your system.

The **Notes** parameter is optional, but allows you to include unique information like package tracking numbers, etc.

Tracking your Sales Funnel results:
The **Reports** and **Statistics** tabs

So now you've created the content your funnel will deliver, you've created a Funnel Contact List to receive new contacts from whatever source you've chosen, and you've built the Funnel schedule to nurture all the new opportunities coming your way.

Once the funnel is humming, you don't have to touch it…but you might want it *to touch* you*!* That's where **Reports** (aka "Alerts") come in.

Check one or both boxes to receive daily and/or weekly summary reports via email.

Funnel Info	Emails	Contact Form	XML Code Sample	Reports	Statistics

Enabled Report	Recipient Emails
☑ Send daily funnel activity summary report	Me@MyCompany.com;MySalesmanager@Mycompany.com
☑ Send weekly funnel activity summary report	Me@MyCompany.com;MySalesmanager@Mycompany.com
	(separate email addresses by semicolon ";")

Always click Save after enabling your Reports.

You can add as many **Recipient Emails** as you like, separated by a semi-colon (;). This is handy if you want your sales manager, IT person or other person to keep an eye on the funnel and your results.

The Statistics tab
Voodoo keeps complex Funnel Stats easily available and exportable.

The **Statistics Snapshot** gives you an overview of your automated: Deliveries, Opens, Open Rates, Video Viewers, Click-Through Rates, and Trackable Link Clickers.

Sent	Opened	Open Rate
42	19	45.24%
42	18	42.86%
41	16	39.02%
41	16	39.02%
41	16	39.02%
42	14	33.33%

Trackable Link Clickers
⊞ 4

Wherever you see a small plus sign, just click it to drill-down deeper into your data.

Trackable Links	
Link Name	Link Clickers
Sales Magic Demo for Mitel Partners	⊟ 4

Trackable Link Clickers					
First Name	Last Name	Email		Company	Edit
Jason	Simons	Jason@ics-c		ICS	Edit
Bo	Szott	bszott@choic	s.com	ChoiceTel Networks	Edit
Gail	Wagner	gwagner@ut	e.com	Utility Telephone	Edit
Greg	Weller	gweller@fror	orks.com		Edit

Whatever you are viewing in the Statistics window can be exported. Just choose your preferred format from the pull-down and click Export.

NOTE: Your Export will include the complete set of data. Open any plus signs (+) to include drill-down data in your export.

✓ Select a format		Export
Acrobat (PDF) file		
Excel		
Word		

Statistics Details provide funnel activity data for each individual in your Funnel Contact List.

Click the Edit link next to any contact name to visit their individual Contact Record, including a complete **Send History** and record of that individual's interaction with your automated outreach.

Along with the complete list of Contacts being served by the funnel, you'll find the entire broadcast schedule laid out in detail.
This includes:
The scheduled **Send Date** for each staged Email to each reicipient
The **Status** of that send (either *Sent* or *Not Started*)
The **Opened Date**,

which logs whenever someone engages the images in the email or double-clicks to open it.
Video Views, which get logged whenever there is a video link included in the email and the recipient clicks-through to watch.

Removing Statistics after testing

At the bottom left of the Statistics page is a button allowing you to remove all the stats for the funnel. This button exists mainly to give you a chance to test funnels after your initial setup, make changes and then clear all test data before you go live with the Funnel.

Please beware that you cannot undo this action. Once the stats are removed, they are gone for good. If you have any doubts about this button, don't click it. Otherwise, make sure you export any data you may need to keep BEFORE you remove the statistics.

Manually adding/updating contacts to a Sales Funnel Contact List

When working with a dynamic Contact List associated with a Sales Funnel, Voodoo's database structure is automatically set up to preserve the <u>original</u> **Added Date** for any Contact in a Funnel List, even if you re-load (overwrite) that person's contact information. As long as the Contact's email address remains the same, **you can keep adding and changing a Contact's information without hurting the integrity of the Funnel's send schedule.** *Funnels also have a built-in feature that prevents sending any Funnel email to the same email address more then once.*

Keep contact lists somewhere other than Voodoo?
See the next page for special tips.

Do you keep contacts in one or more other databases?
With Voodoo, no problem.

Voodoo's *smart re-import feature* is great news if you maintain a parallel Contact List in another database, email application or CRM system. Let's say you upload a specially selected list of contacts from *Salesforce.com* into your Voodoo Funnel List. Over the next couple of weeks, you add some new contacts to *Salesforce*, along with additional information about certain contacts, like phone numbers. And now you want to get all the *new* info into Voodoo…

No problem. You can upload your updated *Salesforce* list and overwrite your Voodoo Funnel List anytime and as often as you want.

Like magic, Voodoo will:
- add your new contacts
- update any information that's changed for your pre-existing contacts
- eliminate duplicates (based on email address)
- plus, Voodoo won't touch the Contact Records of those whose info hasn't changed

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What NOT to do when re-importing…

There is one important exception: Do not <u>remove</u> or delete the original contacts from the Funnel Contact List before re-importing your external list (with or without new contacts added). If you do, the system will clear the original **Added Date** and create a <u>new</u> **Added Date** for ALL the contacts in the list. *This has the effect of rescheduling all future send dates—probably NOT what you want.* As long as the contacts always remain present in your Funnel List, you can overwrite them as often as you like (and even add additional data fields), without affecting the original **Added Date** and scheduled send dates.

If you copy/import contacts into your funnel list *from another list in Voodoo*, be careful! Under the **Copy Contact List** area, choose **Append data to destination contact list.** DO NOT choose **Delete data in destination contact list.**

Now you're a Success Automation expert. May the force of the funnel be with you!