Top 10 Questions: Taskboards and Drips

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1. If the brand builds and launches changes to the taskboard, will all of my cards on the taskboard disappear and be wiped out?

It could. Usually, if the taskboard swim lanes don't change that much - all contacts and proposal cards stay where they should be. However, sometimes it happens if many changes were made that some of that info is lost and you need to manually add them back to the taskboard.

A good rule is to prepare for the worst. Take screenshots of how your taskboards look now so you have a guide if you do need to go back and add things back.

2. Do appointment triggers work on a contact taskboard? For example, will the trigger "first appointment scheduled" let me set them in the right taskboard lane?

Yes, appointment triggers can work on the Contact board. It depends on how the data is mapped on the backend of the service**minder** system.

If you ever want to test if something will work, just set the "Action" for whatever "Trigger" to be something like "set taskboard state". Run on a test Contact, and see if the Contact shows up in the right lane (or column) of the taskboard you are building.

3. Do I have to use Contact categories and tags to shift people on taskboards?

You can shift people between lanes (also called columns) on taskboards in a number of ways. If it is a Contact-type taskboard then Contact-based triggers are going to work the best. Appointment triggers may also work. Proposal triggers will often not fire because they are meant for Proposal-based taskboards.

However, assuming you are using Contact-type taskboard, categories and tags are not the only way to move people between taskboard states. Those are two of the most common.

If you are using the "ExitIF" Actions for triggers, then those only use Contact Categories or tags.

4. How do I set up triggers to get customers to pop up at 3 m/6m/12 mo to call and follow up?

That needs to be a campaign because that is where you set a date range for things to happen. Triggers are for immediate steps. Campaigns are for prolonged steps depending on schedules. So the trigger included would be "start campaign" and the campaign would have these steps built into it.

All the steps you have available for triggers, you also have available in Drip Campaigns.

Many choose to set triggers to do one thing, maybe up to 3 if they all want actions to happen simultaneously at one time. It is always good practice to organize exactly how you want the triggers to fire, but know that sometimes they fire semi-randomly if multiple things are happening at once.

Drip Campaigns can be dozens of steps across several months.

5. How do I edit what "Type" the taskboard is?

There is no way to just edit the type of taskboard once it has been completed, however. It would need to be completely rebuild.

We suggest really thinking about the goal of the taskboard before building it out fully. Do you want Contact-based or Proposal-based? The reason being that if the triggers are proposal sent/accepted/etc, then it'll have to be a proposal taskboard. So I guess you need to figure out if this is going to lean towards Contact triggers or Proposal Triggers. You can always test it to see how it works first before making that adjustment.

What some clients do is have a lead (contact) pipeline and a proposal pipeline. The leads starts on the lead pipeline but when a proposal is sent, triggers can move them from one to the next. So it could be a different taskboard, for instance, and the contact basically changes lanes over to the proposal taskboard/campaign.

6. When should I consider someone a customer and move them into the that state in my taskboard?

This is a business process question. Each brand and business may do things a little differently. Within service**minder**, our system default sets customers after they have paid the first invoice.

You can choose to leave it there or set up triggers to shift Contact categories, tags, and taskboard states earlier in your business process.

7. What is the standard number of drip triggers and taskboards that a brand sets up?

It varies. Some have several, intricate taskboard flows and some only have 1 simple taskboard. We suggest starting off small if you do not have a process laid out of the sales pipeline or customer journey. You can always add on and take away.

Typically, we see between 0 - 5 taskboards. Drip triggers vary since they can be created and made inactive (same for drip campaigns).

8. What is the correct steps to build my first drip campaign and taskboard again?

1. Decide the type of taskboard(s) that you want and write down the lanes or column headers. Then write out the steps you want the campaign to take, what triggers it to start, who goes where at what time? Answer those questions first, and it will help you in the long run.

2. Create all the ad-hoc emails that will be sent out to your Contacts along the way. You can even have two versions of the same email depending on different types of opporunties you have in your business model.

3. Build out the Campaign. When X happens, do this (example: send email #X).

4. Set up the triggers. When X happens, start this campaign.

9. Is it possible to disable a drip campaign for a specific Contact?

Yes, you can manually stop the campaign once the campaign has been triggered to start. You will do this by going to his contact page, under Additional Details select Drips, then click the **End** button next to the campaign you wish to disable.

10. Can I delete triggers and campaigns?

On your side, you can only make triggers Inactive. You probably don't want to delete triggers that have been active since they are attached to Contact data stored within SM for reporting and tracking purposes.

11. Why are some cards red on my taskboard?

Those indicate that there it is overdue. That usually means a task is associated with that Contact or Proposal. For instance, you have a trigger that creates a task whenever an appointment is completed. That task is for someone to call and ask if the customer is satisfied. If that task isn't completed within the due period, it will mark that card with a red border.

Tasks can also be assigned at the Service-level. So you may need to go review which service it happened for and make edits there.