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**Lead Automation: Companies That Start a 7 Day Trial**

The following copy is intended to help you, our Partner, set up an automated workflow to support a lead through their TalentClick 7 Day Trial experience. The emails come from you (not TalentClick) with co-branded messaging to help you efficiently and effectively save time while nurturing leads from trial through to sale.

**Schedule**

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| --- | --- |
| Email | Schedule |
| Email #1 (Manual step) | Immediate - send to qualified lead/prospect |
| Phone Call | Immediate - call with prospect to discuss trial configuration. Fill in Partner link request form to request custom 7 Day Trial link from TC. |
| Email #2 (Manual step) | Once you receive the trial link from TC, Insert custom link into email template and send to prospect (Day 1 of Trial) |
| Email #3-9 (Automated workflow if you set up in a marketing automation process) | Each day of the trial, this email nurture offers a reminder, tip and benefit of using the assessments! |
| Phone Call | Ideally on day 6 of trial to remind participants to upgrade OR to extend their trial if they are still testing |
| Email to TC Support (Manual or set up an automated email notification so this step doesn’t get missed) | Send an email to [support@talentclick.com](mailto:support@talentclick.com) notifying them to downgrade the trial to a basic account if no actions have been taken from the lead to indicate a sale |
| Email #10 (Automated) | Wait 1 day |
| Email #11 (Automated) | Wait 7 days |
| Email #12 (Automated) | Wait 15 days |

**EXIT CRITERIA**: Goals

* Goal met /Success is when a lead contacts Partner to upgrade - NOTE if you have set up an automated email campaign, this prospect will receive all tips (up to email 8) unless they are manually removed from the workflow
* If Lead Does Nothing by end of the campaign, we suggest you add them to your regular communications/ enews lead list

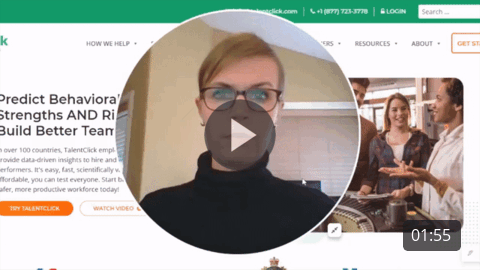
### **Email 1 - immediately after sign up - MANUAL STEP**

**Subject: Thank You for Signing Up for a 7 Day Trial**

Welcome CONTACT.FIRSTNAME!

Thank you for signing up for your 7 Day **TalentClick Trial**. We can't wait to get you started! We’ve made this quick 2-minute video to help you get the most out of your trial.

The 7 Tips to maximize your trial experience:

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[**7 Tips for your 7 Day Trial**](http://videos.talentclick.com/watch/vdkV8TCSSPFg9bXrXEkq3C?)

A member of the TalentClick team is busy setting up your account and will send along your login details as soon as they are ready. This may take up to 2 business days.

In the meantime, please see the relevant resources to set you up for success while using TalentClick assessments to hire and develop your best teams:

* [TalentClick Portal Overview](https://talentclick.com/resources/talentclicks-new-portal-quick-demo/) (3 min video)
* [AVP Quick Reference Guide](https://www.talentclick.com/wp-content/uploads/2020/09/AVP-Quick-Reference-Guide.pdf) (to understand and interpret reports)
* [TalentClick Portal User Guide](https://www.talentclick.com/wp-content/uploads/2021/01/Guide-to-using-Portal-General.pdf)

If you haven’t had the chance yet, take 10-15 minutes to try the AVP assessment for yourself to learn about your own workstyle, work values and risk-taking behaviors!

<BUTTON - AVP TRIAL: INSERT PARTNER AVP LANDING PAGE LINK>

Please keep an eye on your Inbox for an email with your account details, coming your way shortly!

PARTNER SIGNATURE

### **Email 2 - MANUAL STEP**

**Subject: Welcome to TalentClick! TIP #1 - Start Making Smarter Decisions**

Hi <firstname>,

Welcome to TalentClick! Thanks for signing up for your 7 Day Trial to evaluate our TalentClick assessment solutions. We can’t wait for you to get started with these 3 easy steps!

**TIP #1 - Start Making Smarter Decisions**

With advanced reporting tools and analytics, the TalentClick Portal is your one-stop-shop for all your TalentClick needs.

**Step 1 - Log In to the TalentClick Portal**

A trial account has been created just for you::

* Navigate to <https://reports.talentclick.com>
* Click on “Set Password”
* Enter your email address (username)
* Your secure link will be sent to that email address to configure your password.

**Step 2 - Send Assessment Invitation**

Simply edit, copy and paste this template into an email to invite participants to begin taking the assessment. You can also send to one or more participants at a time using the Invite Tab in your portal account.

Hi <First Name>,

Thank you in advance for taking 10-15 minutes to complete this assessment. When answering the questions, it is best for you to answer using your first impression rather than thinking too much about how to respond. And remember…

- There are no right or wrong answers, and there’s no “pass” or “fail”

- Answer from a workplace perspective

To begin the questionnaire, click the link below:

<INSERT CUSTOM TRIAL LINK FOR LEAD>

Thank you,

<Your Signature>

**Step 3 - Interpret Reports**

Once logged into the portal, click on the ‘Resources’ tab at the top and click on the AVP icon. You can also see all resources by solution or click on the ‘General Resources’ button for links to guides, videos, and downloadable resources to help you interpret and use the report insights with confidence.

**Need Help?**

* In the TalentClick portal, click the Help tab (top right)
* For Tech Support: email: [support@talentclick.com](mailto:support@talentclick.com)
* For Client Support or to upgrade at any time: email [clientcare@talentclick.com](mailto:clientcare@talentclick.com) or call 1-877-723-3778 ext. 108

Download the How to Select a Talent Vendor eBook & Checklist today!

<BUTTON - DOWNLOAD NOW >

PARTNER SIGNATURE

### **Email 3 - START OF AUTOMATION**

**Subject: TalentClick Tip #2 - Get Started Testing Everyone!**

Hi <first name>,

It’s Day 2, and we want to make sure you get the most out of your TalentClick trial!

Have you invited people to take the assessment to see your “people data” at work? See how easy it is for your participants in this 2-minute video: [The Participant Experience](http://videos.talentclick.com/watch/7QrHxZ5hcihxuwUuS7VLMQ?)

**TIP #2 - Test Everyone!**

Remember, there is no limit on how many people you invite to complete the assessment during your 7 Day Trial. Get started testing everyone! Not only do we believe in making [unlimited-use assessments affordable](https://talentclick.com/pricing/) and easy to use, we know that by assessing more candidates earlier in your workflow, you can [reduce bias](https://talentclick.com/resources/5-ways-assessments-help-build-diverse-teams/) in the hiring process and build a stronger, more diverse team.

[Questions?](https://talentclick.com/faqs/) We’re happy to help!

Better Insights. Better Teams.

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| **Email 4** **Subject: TalentClick Tip #3 - Action your Reports!**  Hi <first name>,  Now that you’ve invited job applicants or employees to take the assessment, it’s time to start taking action with the results!  All reports include personalized interview questions, management considerations and coaching tips to help you make better “people decisions.” Here’s how to easily spot who is a great FIT!  **TIP #3 - Take your report insights to the next level with Report Builder**  Select “ideal profile” benchmarks and see the easy-to-action Fit Score to quickly identify the superstars who fit the job AND fit the culture. Color-coded just like traffic lights, Green means ‘*Go*’, Yellow means ‘*Proceed with caution*’, and Red means ‘*Stop and think before proceeding*.’  Watch this quick video to get started with [TalentClick’s Report Builder!](http://videos.talentclick.com/watch/GB4ipskvRbv48kDYwAbZfm?)  Better Insights. Better Teams.   |  | | --- | | PARTNER SIGNATURE | |  |  **Email 5** **Subject: TalentClick Tip #4 - Scientifically Validated Tools you can Trust**  Hi <first name>,  We hope our Tip of the Day gives you the confidence you need to use TalentClick for your employee-related decisions. All TalentClick assessments are **valid and reliable for both hiring and development**, meeting standards that make them legally defensible for your organization.  You may be asking yourself, “What is the Validity Score on my Employer Reports?”  **TIP #4 - Watch for the CAUTION flag**    Rest assured, our assessment tools have proven validity and reliability, and nothing changes that. But, the way someone has answered the questions may invalidate their results. On the summary page of a report, **an ‘Acceptable’ validity score means the participant was truthful when completing the assessment. Alternatively, a ‘Caution’ flag means the individual was either distracted or answered inconsistently, perhaps to appear more favorable.** If you see ‘Caution,’ read the results with a grain of salt and verify areas that may seem ‘too good to be true’ by asking relevant interview questions and then verify results with good hiring practices like background checks and reference checks.  Want to know more? Download our whitepaper: [Ipsative vs. Normative Personality Tests: Which is the Right Tool for Hiring?](https://talentclick.com/resources/ipsative-vs-normative-personality-tests-which-is-the-right-tool-for-hiring/) by our Chief Product Officer - Stephen Race, MSc Occupational Psychology.  Better Insights. Better Teams.   |  | | --- | | PARTNER SIGNATURE | |  |  **Email 6** **Subject: TalentClick Tip #5 - Spot the High Risk**  Hi <first name>,  It’s Day 5 and you’re over halfway through your 7 Day TalentClick Trial! Today we want to let you know why we bundle the Safety Quotient (SQ) or Driver Safety Quotient (DSQ) into our Attitude-Values-Personality (AVP) solution.  While many of our clients use these products to help create a safer work environment for their front-line workers and reduce their Safety Incident Rate, assessing risk goes further.  **TIP #5 - Spot the High Risk**  Predict Your Next Incident  [Predict Your Next Incident](http://videos.talentclick.com/watch/8hfVLEmXUmHHE8Acfaxre2?)  Workers and employees who have a low SQ score are a risk to your organization in more than safety incidents alone. They can threaten work culture, productivity, profitability and more. Check out the management and coaching tips on each report to help you support your employees in a personalized and impactful way.  [Managing Safety Risk with Employee Personality Insights](https://talentclick.com/resources/managing-safety-risk-with-personality-insights/?utm_campaign=Enews&utm_source=hs_email&utm_medium=email&_hsenc=p2ANqtz-9q-23T12LAMvjAmRhanb9Bvu4UQfkgfMtw66PPzPGg2Wr5JMsQxHWWyGn1UBn-fdA9rYpCNjK0c-hBUJKAVHynjvm9UQ)  Better Insights. Better Teams.   |  | | --- | | PARTNER SIGNATURE | |  |  **Email 7** **Subject: TalentClick Tip #6 - Screen IN More Candidates**  Hi <first name>,  On Day 6 of your TalentClick Trial, it’s time to identify more top talent for your positions!  TalentClick reports can help you **assess potential** and **screen IN** more candidates. Here are the top 5 ways TalentClick Reports help you find high performers in a labor shortage!  **Tip #6 - Screen IN More Candidates**  BUTTON Read Blog CTA: <https://talentclick.com/resources/5-ways-behavioral-assessments-help-in-a-candidate-shortage/>  As you approach the end of your trial, we hope you see how TalentClick can help you make better people decisions. If you have any [questions](https://talentclick.com/faqs/) at all, please contact us. We’re here to help!  PARTNER SIGNATURE **Email 8** **Subject: TalentClick Tip #7 - Save Time & Reduce Turnover**  Hi <first name>,  On Day 7 of your TalentClick Trial, we bring you 3 tips (bonus!) on how to save time and reduce costly and disruptive turnover in your workforce!  **Tip #7 - Save Time & Reduce Turnover**   1. Save time with the Fit Score Sorter: Sort through the job applicants to find those who are most likely to be top performers on the job. 2. Know what good looks like: Reduce turnover by hiring to an ideal profile. See how workers may [stay in the job 40% longer!](https://talentclick.com/resources/international-security-services-company-research-study/) 3. And finally, when it comes to employee learning and development, you can coach, motivate, and manage employees more effectively by adapting to each person’s needs using the coaching tips included in each report. Higher employee satisfaction increases retention and helps build a strong culture and productive, happy team.   You’re nearing the end of your trial. Have you been able to incorporate all your Trial Tips yet?  Better Insights. Better Teams.   |  | | --- | | PARTNER SIGNATURE | |  |  **Email 9** **Subject: It’s the Last Day of your TalentClick Trial!**  Hi <first name>,  Congratulations on completing your 7 Day Trial! We hope our tips helped you get the most out of your TalentClick experience. With your trial expiring tomorrow, we don’t want you to miss out on all you’ve gained over the past 7 days.  7 Tips for your 7 Day Trial  [7 Tips for your 7 Day Trial](http://videos.talentclick.com/watch/vdkV8TCSSPFg9bXrXEkq3C?)  Upgrade now so you don’t lose access to your reports and analytics tools. You can even sign up for a month-to-month payment plan where you can easily cancel at any time if you’re not 100% satisfied.  <BUTTON - GET AN INSTANT QUOTE: https://talentclick.com/pricing/>  PARTNER SIGNATURE |

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### **Email 10 - wait 3 days**

**Subject: TalentClick Trial Expired - We’re sad to see you go**

Hi <first name>,

Thank you for trying out TalentClick. We hope you found value in all our tips!

Now that your trial has expired, your account has been downgraded to a Basic subscription.

We wanted to let you know it’s easy to upgrade to a month-to-month subscription and get access to all the Standard features. All you have to do is click on the button below and email us saying “Upgrade please!” We will confirm your quote and get you started making better people decisions right away.

UPGRADE BUTTON <mailto: your emailaddress>

Thanks for trying TalentClick, and we look forward to hearing from you soon!

Warm regards,

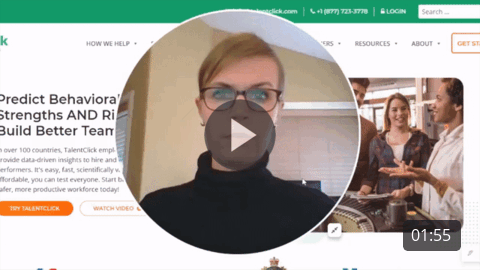
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### **EMAIL #11**

**Subject: Still interested in hiring and developing 20% more top performers?**

Hi <First Name>,

We haven’t heard from you since you completed your TalentClick Trial. We wanted to check in and make sure that you were able to make the most of your trial experience. In case you missed it, here are the 7 tips and benefits of your TalentClick solution:

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[7 Tips for your 7 Day Trial](http://videos.talentclick.com/watch/vdkV8TCSSPFg9bXrXEkq3C?)

It’s easy to upgrade to an unlimited-use subscription, and you can even sign up for a month-to-month payment plan where you can easily cancel at any time if you’re not 100% happy. **CLICK HERE<mailto: partner email address>** and we will get you started!

We look forward to hearing from you.

Warm regards,

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### **Email 12 - Final**

**Subject: Hire & Develop Top Performers - Upgrade with TalentClick**

Hi {{First Name}},

Our goal has always been to create long-term relationships with our clients, and we want to make sure you are benefitting from our world-class assessments for hiring and developing top-performing employees.

Contact us to get back up and running with TalentClick’s assessments at any time!

Warm regards,

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