

Visitor IQ: Client Setup & Onboarding

digital 55

Transform Your Website Into a Lead Generation Powerhouse

Who's Visiting & What They're Viewing

Get details like Name, Address, Email, Gender, and more. Plus, see exactly which pages they're viewing, and how many times.

Better Qualified Leads

Set up to 10 unique filters to turn your leads into high-quality opportunities.

Automated Outreach

Send visitors 1-3 personalized emails about your organization starting the next day.

Help your customers understand what sets your organization apart in your industry.

Visitor Data Available 24/7/365

All visitor data is seamlessly integrated into your CRM account, accessible and downloadable.



The Visitor IQ Process



Collect

A person visits your website, triggering Visitor IQ's data capture and identification. Providing a rich understanding of your visitors' behavior and intent.



Analyze

The platform's powerful algorithms analyze the collected data, identifying valuable leads and filtering out irrelevant traffic, such as bots and automated systems.



Integrate

Visitor IQ seamlessly integrates with your CRM system, automatically updating visitor details and ensuring a streamlined lead management process.



Engage

Based on the insights gathered, Visitor IQ initiates personalized email outreach and nurturing campaigns, effectively engaging with your identified leads and driving them further down the sales funnel.



Send

Export and forward the CSV file to your organization or mailing vendor for postcard processing.

Client Setup

DAY ONE

Intro Session

How Visitor IQ fits your business:

- Learn more about Visitor IQ & data collected
- Gather info to deploy Visitor IQ & set lead filters
- Visitor IQ accounts:
 - Pixel
 - CRM
 - Email

WEEK ONE

30 Day Free Trial

Setup free trial accounts:

- Pixel account setup & create Pixel
- Install Script on site(s)
- Update Privacy Policy
- Email account setup – Welcome & Nurture copy, logo, contact info.
- CRM account setup

WEEK TWO-THREE

Free Trial Review

Walk through trial results to-date:

- Review contact list
- Adjust filters as needed
- Adjust reports as needed

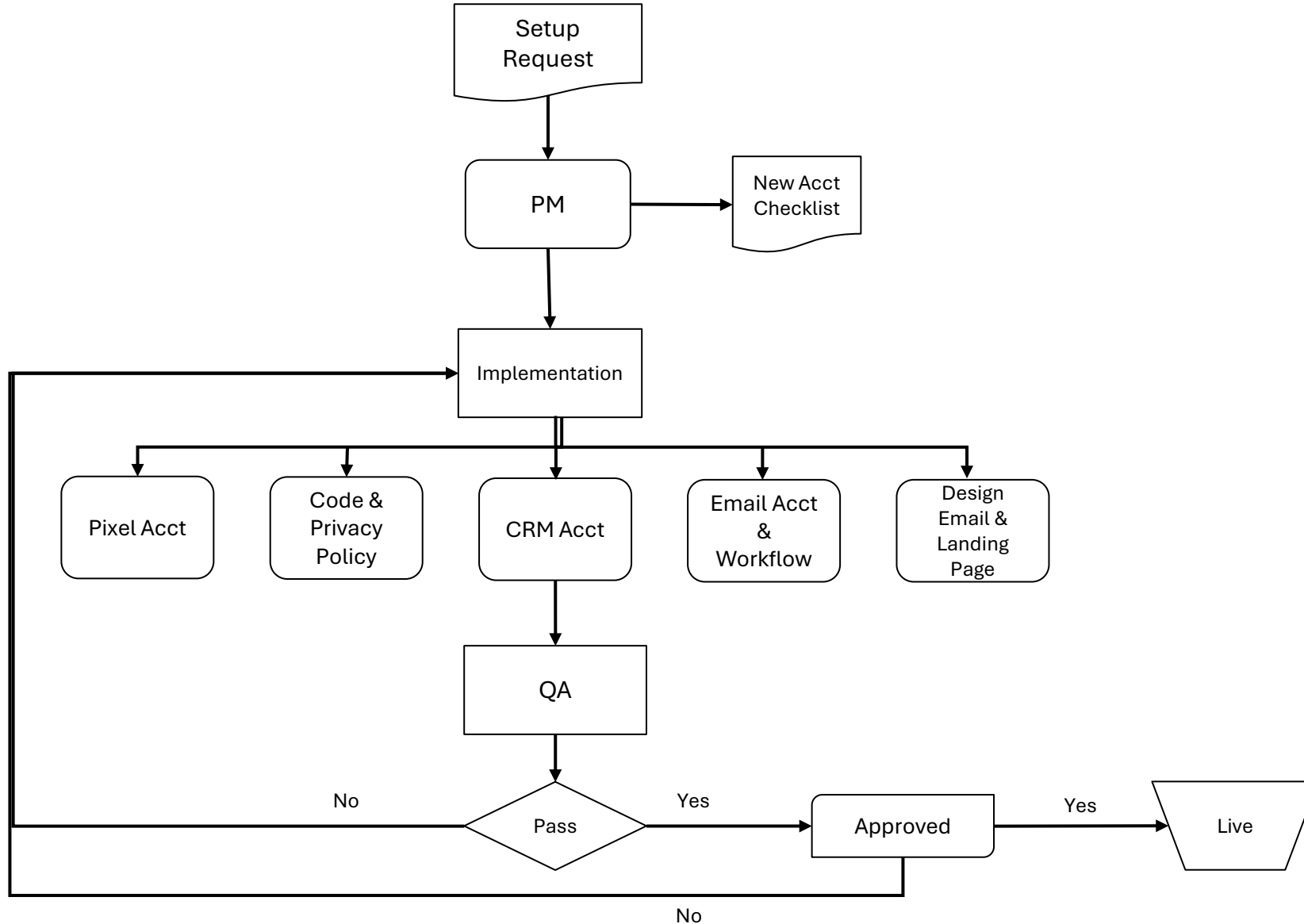
WEEK FOUR

Sign & Launch

Get Started w/ Visitor IQ:

- Review pricing plan
- Review and sign contract
- Adjust filters as needed
- Adjust reports as needed

Onboarding Process



Visitor IQ Workflow

