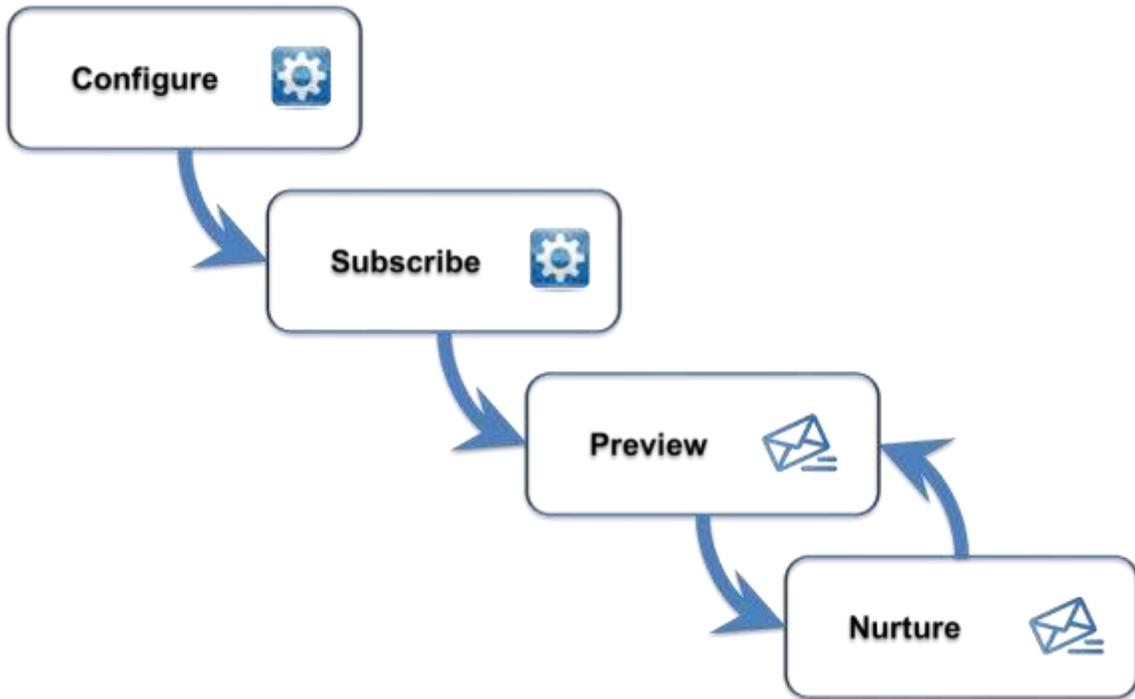


# The **Value** Builder System™



## Nurture Cycle

GETTING STARTED GUIDE

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## A. What is the Nurture Cycle?

Save time by putting your lead marketing on autopilot. The Nurture Cycle allows you to cultivate your existing relationships with potential customers and start to build relationships with new leads. The Nurture Cycle gives you the ability to automatically email your contacts our weekly Built to Sell Radio episodes, monthly articles, quarterly webinar invitations and yearly research bulletin. You also can customize the call to action in Nurture Cycle emails for new leads and existing customers. Drive new leads to get their Value Builder Score and support existing customers to convert them into the Value Builder Engagement program. No matter where your leads are in the sales funnel, the goal remains the same: to consistently provide value over time, build a relationship, gain loyalty and eventually... win their business.

## B. Nurture Cycle Process

The **first step** of the Nurture Cycle process is to activate the Nurture Cycle and configure the settings to meet your needs. To activate Nurture Cycle, go to **Settings > Nurture Cycle > Activate**. The Nurture Cycle provides you the flexibility to choose the:

- Type of content to send to your contacts
- Which contacts to nurture
- Whether to automatically opt-in contacts to receive Nurture Cycle content
- Call to action included at the bottom of all Nurture Cycle emails
- Point when Nurture Cycle de-activates (or turns off) for a contact (e.g., when a contact completes the questionnaire).

To learn how to configure your Nurture Cycle, go to **Settings > Nurture Cycle > Settings**.

Once you have activated and configured your Nurture Cycle, the **second step** of the process is to enrol your contacts in Nurture Cycle (unless you have chosen to activate all contacts automatically upon adding from an import list). Contacts can be activated and deactivated in the Nurture Cycle either individually or in bulk. To learn how to activate your contacts in Nurture Cycle, go to **Settings > Nurture Cycle > Subscription Management**.

In the **third step** of the Nurture Cycle process, you will receive preview emails as new Nurture Cycle content becomes available. When new content is available to nurture your contacts, you will receive a preview of the email that your contacts will see three days before your contacts are scheduled to receive it. This gives you the opportunity to turn off Nurture Cycle, if for any reason you do not want to have the email sent to your contacts. To turn off Nurture Cycle, go to **Settings > Nurture Cycle > Settings** and click **De-Activate Nurture Cycle**. You can always re-activate the Nurture Cycle again in the future.

## De-Activate Nurture Cycle

Your contacts will no longer receive Nurture Cycle emails.  
Settings, subscription status and history will be saved for all contacts.

## De-Activate Nurture Cycle

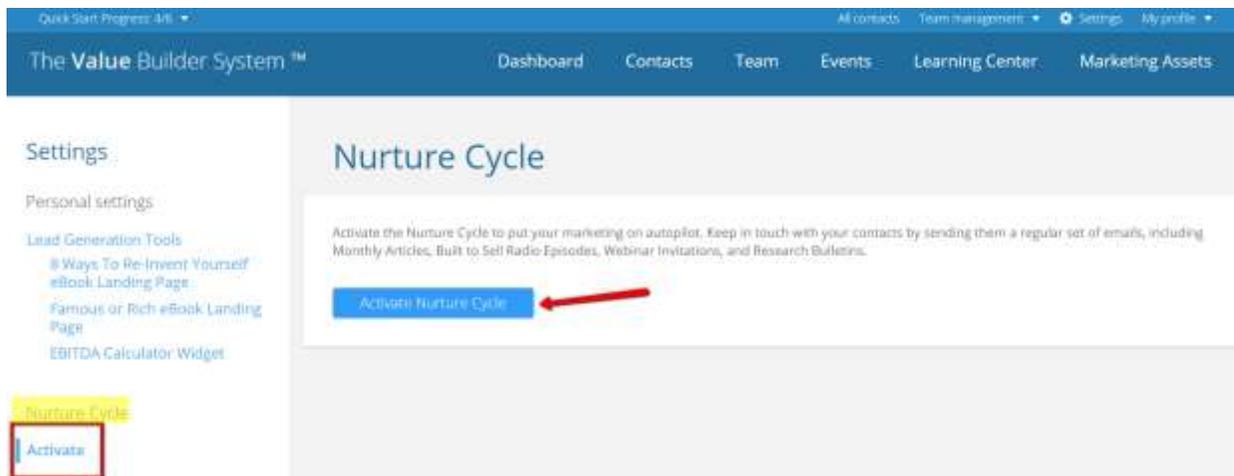
[Save Changes](#) [Cancel](#)

In the **fourth step** of the Nurture Cycle process, those contacts that you have enrolled in Nurture Cycle, will receive a Nurture Cycle email.

We have made every attempt to meet anti-spam regulations in designing the Nurture Cycle. Your contacts will have the ability to unsubscribe from your Nurture Cycle, via an unsubscribe link in the Nurture Cycle emails. We will monitor unsubscribe activity and turn off the Nurture Cycle for advisors that have an unusually high volume of unsubscribed contacts. Please ensure that you follow anti-spam regulations and guidelines when choosing who to include in your nurture campaign.

## C. Activate Your Nurture Cycle and Configure Settings

To activate your Nurture Cycle, go to **Settings > Nurture Cycle > Activate** and click **Activate Nurture Cycle**.



Configure the Nurture Cycle, by choosing your settings. These settings can be changed at any time.

## Settings

### Personal settings

#### Settings

#### PREScore™ Settings

#### Value Builder Score Questionnaire Settings

#### Value Builder Score Report

##### Enable New Report Design (Beta)

##### Customize "Consider the Following" Items

##### Personalize Report

##### Valuation Algorithm

#### Custom SMTP Settings

#### Lead Generation Tools

##### 8 Ways To Re-Invent Yourself eBook Landing Page

##### Famous or Rich eBook Landing Page

##### EBITDA Calculator Widget

### Nurture Cycle

#### Activate

#### Team settings

##### Team Information

##### Team Value Builder Score Questionnaire Embed

##### Engagement Token Management

## Activate Nurture Cycle

### Nurture Cycle activation for existing contacts \*

Once you activate your Nurture Cycle, you can enroll all or selected contacts at any time.

- Keep previous subscription settings (i)
- Activate Nurture Cycle for all existing contacts
- Activate for manually selected contacts

### Nurture Cycle emails

You will receive a Nurture Cycle preview email three days prior to it being sent to active contacts. The system attempts to send emails to your contacts between 8am and 1pm in your country's main timezone.

- Monthly article 
- Built to Sell Radio episode 
- Webinar invitation 
- Research bulletin 

[Edit Call to Action](#) ▾

### Automatic opt-in

- Activate Nurture Cycle for contacts who have started the questionnaire via your website or personal questionnaire link

### Welcome email

The Welcome email will be the first email sent to a contact when they are activated in the Nurture Cycle.

[Edit email](#)  [Send test email to sophia.rubs@valuebuildersystem.com](#)

### De-Activate Nurture Cycle \*

- Never
- When the contact completes the questionnaire
- When the contact starts a Value Builder Engagement Program

### i. Nurture Cycle activation for existing contacts

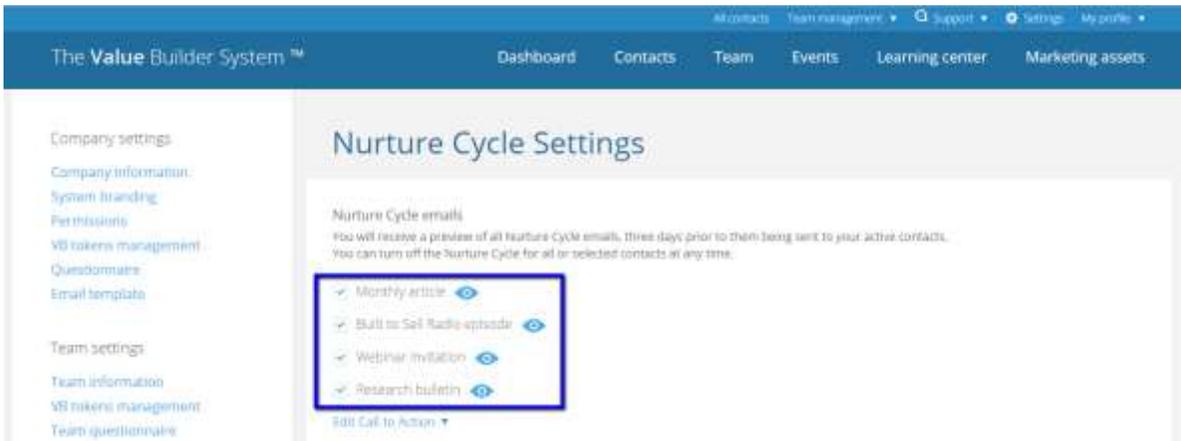
Select **Activate Nurture Cycle for all existing contacts** to automatically enrol all your contacts in your Nurture Cycle.

Select **Activate for manually selected contacts** to choose which contacts to include in your Nurture Cycle.

Once Nurture Cycle is activated, your contacts can be enrolled or unenrolled at any time. Contacts can be enrolled individually or in bulk.

### ii. Nurture Cycle emails

There are four types of content available for your Nurture Cycle emails: Monthly articles, Built to Sell Radio episodes (weekly), Webinar invitations (quarterly) and a research bulletin (yearly). Select any or all types of emails to include in your Nurture Cycle.



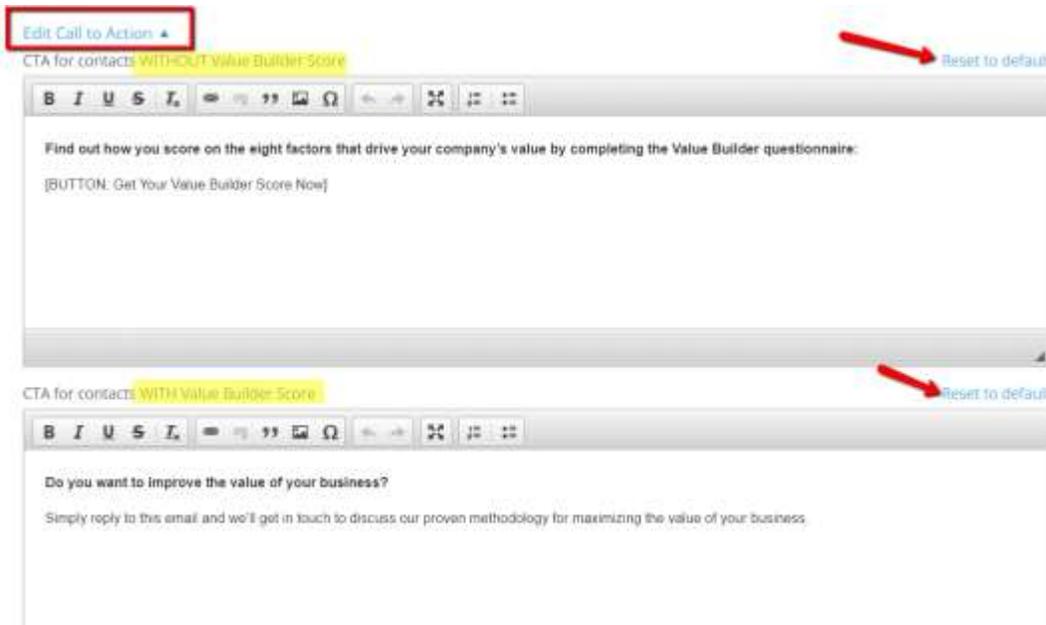
To see an example of each email type, click the eye icon (  ).

When we schedule a Nurture Cycle email, a preview will be sent to you three days prior to being sent to your activated contacts. If you do not want the Nurture Cycle email to be sent to your activated contacts, go to **Settings > Nurture Cycle > Settings** and click **De-Activate Nurture Cycle**.

### iii. Call to Action

A call to action is included at the end of all Nurture Cycle emails. There are two different calls to action available: one that is used for contacts that have not completed the Value Builder Score questionnaire and one that is used for contacts that have already completed and received their Value Builder Score. A default template is provided for each call to action. To customize your calls to action, click **Edit Call to Action**.

Update the content of your call to action for contacts **WITHOUT** their Value Builder Score and for contacts **WITH** their Value Builder Score.



iv. Automatic Opt-in

Select **Activate Nurture Cycle** for contacts who have started the questionnaire via your website or personal questionnaire link to have contacts automatically enrolled in your Nurture Cycle as their questionnaires come into your advisor portal from the web. **Note:** by selecting this option, each time a contact completes a contact form (i.e.: from your Value Builder Score, PREScore™ or lead generation tool embed codes or personal landing page links, they will be enrolled in your Nurture Cycle.)

v. De-Activate Nurture Cycle

Decide when you want the Nurture Cycle to de-activate (or stop).

Select **Never** if you want to continue to nurture your contacts until you manually take contacts out of Nurture Cycle or turn off Nurture Cycle all together.

Select **When the contact completes the questionnaire** if you only want to nurture your contacts until they complete their Value Builder Score questionnaire.

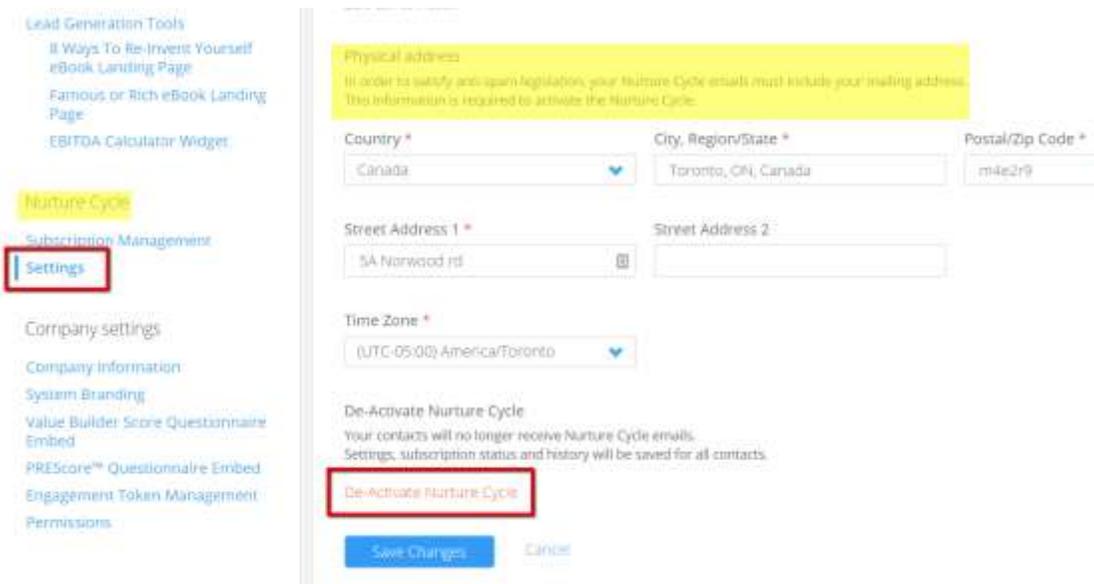
Select **When the contact starts a Value Builder Engagement Program** if you only want to nurture your contacts until you activate an engagement with them.

vi. Physical address

As part of our efforts to meet anti-spam regulations, you are required to include a physical address that will be provided in Nurture Cycle emails. These fields are required in order to activate Nurture Cycle.

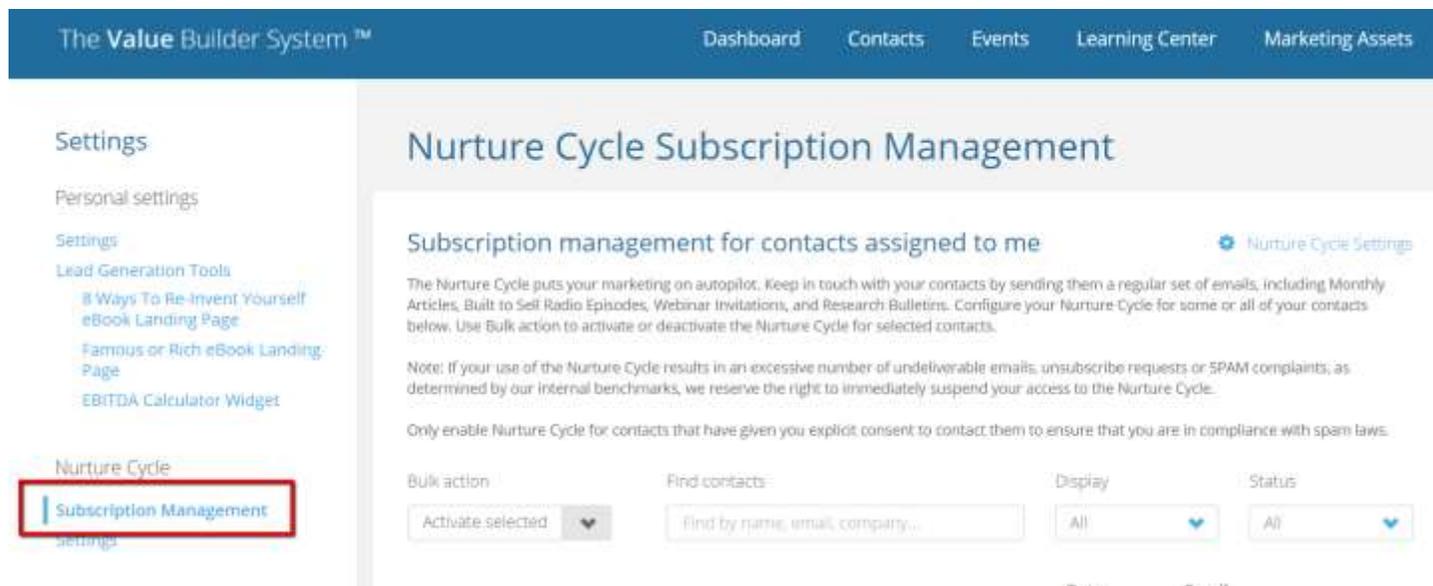
vii. De-Activate Nurture Cycle

Your Nurture Cycle can be turned off at any time. Go to **Settings > Nurture Cycle > Settings** and click **De-Activate Nurture Cycle**.



## D. Subscription Management

Subscription management is where you can review all your contacts and select which ones you want to include in the Nurture Cycle. You can do this individually or in bulk. Go to **Settings > Subscription Management**. Once activated, your contacts will begin receiving Nurture Cycle emails.



The screenshot shows the 'Nurture Cycle Subscription Management' page. The top navigation bar includes 'The Value Builder System™', 'Dashboard', 'Contacts', 'Events', 'Learning Center', and 'Marketing Assets'. The left sidebar lists 'Settings' with sub-items: 'Personal settings', 'Settings', 'Lead Generation Tools' (including '8 Ways To Re-Invent Yourself eBook Landing Page', 'Famous or Rich eBook Landing Page', and 'EBITDA Calculator Widget'), and 'Nurture Cycle' (with 'Subscription Management' highlighted in a red box). The main content area is titled 'Nurture Cycle Subscription Management' and contains the following text:

**Subscription management for contacts assigned to me** [Nurture Cycle Settings](#)

The Nurture Cycle puts your marketing on autopilot. Keep in touch with your contacts by sending them a regular set of emails, including Monthly Articles, Built to Sell Radio Episodes, Webinar Invitations, and Research Bulletins. Configure your Nurture Cycle for some or all of your contacts below. Use Bulk action to activate or deactivate the Nurture Cycle for selected contacts.

Note: If your use of the Nurture Cycle results in an excessive number of undeliverable emails, unsubscribe requests or SPAM complaints, as determined by our internal benchmarks, we reserve the right to immediately suspend your access to the Nurture Cycle.

Only enable Nurture Cycle for contacts that have given you explicit consent to contact them to ensure that you are in compliance with spam laws.

Below the text are controls for 'Bulk action' (a dropdown menu with 'Activate selected' selected), 'Find contacts' (a search input field with placeholder text 'Find by name, email, company...'), 'Display' (a dropdown menu with 'All' selected), and 'Status' (a dropdown menu with 'All' selected). At the bottom, the column headers 'Name' and 'Email' are visible.

### 1. Contact status

Each of your contacts has a Nurture Cycle status, and an explanation of what each status means can be found by hovering over the status.

#### Active status

An active status means that the contact is enrolled in Nurture Cycle and will receive your Nurture Cycle emails.

#### Inactive status

An inactive status means that the contact has not been enrolled in the Nurture Cycle and will not receive Nurture Cycle emails.

#### Completed status

A completed status means that the contact has reached the end of the Nurture Cycle, based on your **De-activate Nurture Cycle** settings. (Go to **Settings > Nurture Cycle > Settings** to review your selections.) A contact with a completed status will no longer receive Nurture Cycle emails.

## Unsubscribed status

An unsubscribed status means that the contact clicked the unsubscribe link from one of your Nurture Cycle emails or made a SPAM complaint and will no longer receive Nurture Cycle emails.

## Temporary Failure

Delivery to the contact's email address received an unexpected status or soft fail. Our server will try sending the email again later.

## Bounced

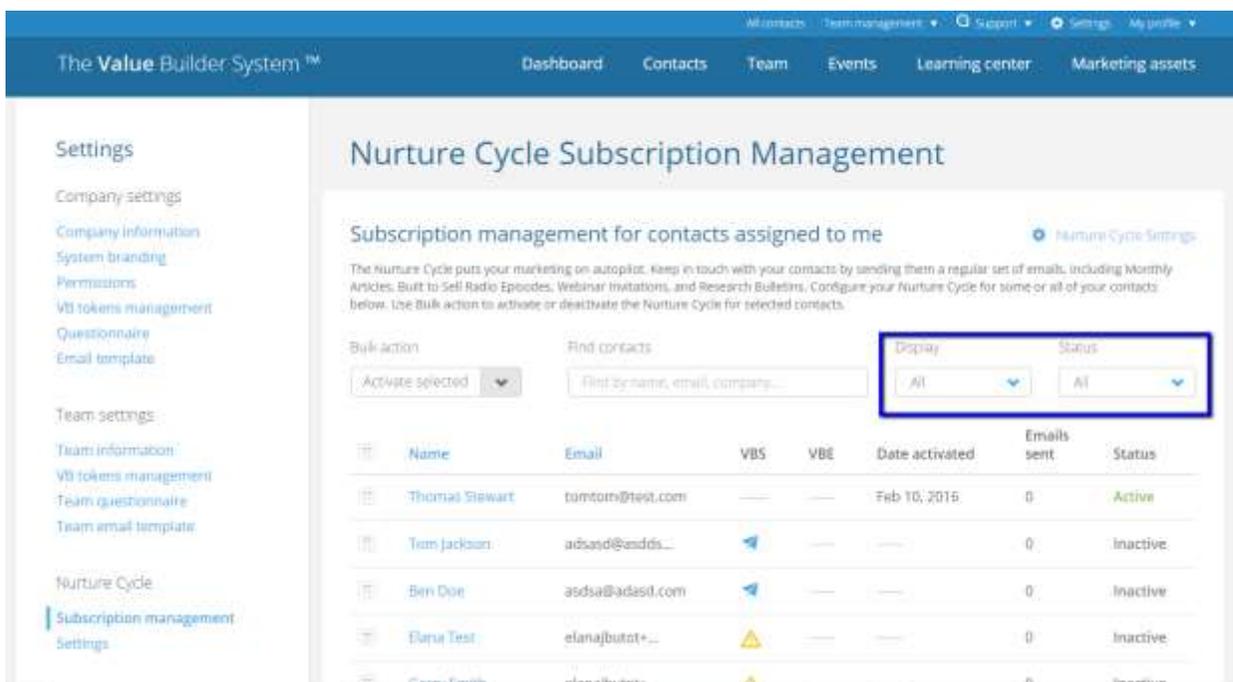
We received an active rejection, or "No User Found" error when trying to deliver.

## Invalid Email

Email address has not validated and may be entered incorrectly. This contact is enrolled in the Nurture Cycle and will begin receiving Nurture Cycle emails once their invalid email address has been updated.

## 2. Display options

Use the **Display** and **Status** dropdown lists to view and sort groups of contacts.



The screenshot displays the 'Nurture Cycle Subscription Management' interface. The main content area is titled 'Subscription management for contacts assigned to me'. Below this title, there is a 'Bulk action' dropdown set to 'Activate selected' and a 'Find contacts' search box. Two dropdown menus, 'Display' and 'Status', are highlighted with a red box, both set to 'All'. Below these controls is a table of contacts with the following data:

Name	Email	VBS	VBE	Date activated	Emails sent	Status
Thomas Stewart	tamtorna@test.com	—	—	Feb 10, 2015	0	Active
Tom Jackson	adsasd@addd...	—	—	—	0	Inactive
Ben Doe	asdsa@adad.com	—	—	—	0	Inactive
Elsa Test	elana@butn+...	—	—	—	0	Inactive
Gerry Smith	elana@butn...	—	—	—	0	Inactive

## 3. Activate and Deactivate Contacts in the Nurture Cycle

To activate or deactivate contacts from your Nurture Cycle, click the check box next to each contact's name. Then click **Bulk action > Activate selected** or **Bulk action > Deactivate selected**.

## Settings

Company settings

Company information

System branding

Permissions

VB tokens management

Questionnaire

Email template

Team settings

Team information

VB tokens management

Team questionnaire

Team email template

Nurture Cycle

Subscription management

Settings

## Nurture Cycle Subscription Management

### Subscription management for contacts assigned to me

[Nurture Cycle Settings](#)

The Nurture Cycle puts your marketing on autopilot, keep in touch with your contacts by sending them a regular set of emails, including Monthly Articles, Built to Sell Radio Episodes, Webinar invitations, and Research Bulletins. Configure your Nurture Cycle for some or all of your contacts below. Use Bulk action to activate or deactivate the Nurture Cycle for selected contacts.

Bulk action: Activate selected   
Find contacts:   
Display: Questionnaire   
Status: Inactive

	Name	Email	VBS	VBE	Date activated	Emails sent	Status
<input type="checkbox"/>	Elana Test	elana@butot+...		—	—	0	Inactive
<input checked="" type="checkbox"/>	Gerry Smith	elana@butot+...		—	—	0	Inactive
<input checked="" type="checkbox"/>	Jean Smythe	elana@butot+...		<input checked="" type="checkbox"/>	—	0	Inactive
<input type="checkbox"/>	Jarvis Gerry	elana@butot+...		—	—	0	Inactive
<input checked="" type="checkbox"/>	Joe Alexander	elana@butot+...		—	—	0	Inactive

To select all of the contacts in the list, click the check box next to **Name**.

The Value Builder System™ Dashboard Contacts Team Events Learning center Marketing assets

### Nurture Cycle Subscription Management

Subscription management for contacts assigned to me

The Nurture Cycle puts your marketing on autopilot. Keep in touch with your contacts by sending them a regular set of emails, including Monthly Articles, Built to Sell Radio Episodes, Webinar Invitations, and Research Bulletins. Configure your Nurture Cycle for some or all of your contacts below. Use Bulk action to activate or deactivate the Nurture Cycle for selected contacts.

Bulk action: **Activate selected** Find contacts: Find by name, email, company... Display: All Status: Inactive

<input type="checkbox"/>	Name	Email	VBS	VBE	Date activated	Emails sent	Status
<input type="checkbox"/>	Tom Childs	asdsadsds@ad...	📧	—	—	0	Inactive
<input type="checkbox"/>	Spencer Kroon	elanajbutot@...	53	✓	—	0	Inactive
<input type="checkbox"/>	Jean Smythe	elanajbutot+...	⚠️	✓	—	0	Inactive
<input type="checkbox"/>	Gerry Doe	ads@asdds.com	—	—	—	0	Inactive
<input type="checkbox"/>	Fred Stone	asdkasdk@ite...	—	—	—	0	Inactive

The portal will let you know how many contacts have been selected on the current page. If you only want to update the contacts from the current page, click **Bulk action > Activate selected** or **Bulk action > Deactivate selected**. If you want to include all contacts in the list, click **Select all XX contacts** from the yellow bar. Then click **Bulk action > Activate selected** or **Bulk action > Deactivate selected**.

The Value Builder System™ Dashboard Contacts Team Events Learning center Marketing assets

### Nurture Cycle Subscription Management

Subscription management for contacts assigned to me

The Nurture Cycle puts your marketing on autopilot. Keep in touch with your contacts by sending them a regular set of emails, including Monthly Articles, Built to Sell Radio Episodes, Webinar Invitations, and Research Bulletins. Configure your Nurture Cycle for some or all of your contacts below. Use Bulk action to activate or deactivate the Nurture Cycle for selected contacts.

Bulk action: **Activate selected** Find contacts: Find by name, email, company... Display: All Status: Inactive

⚠️ 43 contacts on this page are selected. Select all 72 contacts

<input checked="" type="checkbox"/>	Name	Email	VBS	VBE	Date activated	Emails sent	Status
<input checked="" type="checkbox"/>	Tom Childs	asdsadsds@ad...	📧	—	—	0	Inactive
<input checked="" type="checkbox"/>	Spencer Kroon	elanajbutot@...	53	✓	—	0	Inactive
<input checked="" type="checkbox"/>	Jean Smythe	elanajbutot+...	⚠️	✓	—	0	Inactive

## 1. Individual Contacts

You also have the ability to activate or deactivate one contact at a time. To do that, go to **Contacts** and select the contact you want to review and/or update.

To activate the Nurture Cycle for a contact that is **Inactive**, click **Activate Nurture Cycle**.

The screenshot shows the 'Value Builder System' interface. The top navigation bar includes 'All contacts', 'Team management', 'Support', 'Settings', and 'My profile'. The main navigation bar has 'Dashboard', 'Contacts' (highlighted), 'Team', 'Events', 'Learning center', and 'Marketing assets'. The contact profile for 'Gerry Doe' is displayed on the left, with fields for 'Company', 'Email', 'Country', and 'Assigned advisor'. The 'Nurture Cycle' section is highlighted with a blue box, showing 'Status: Inactive' and an 'Activate Nurture Cycle' button. The right side of the interface shows 'Value Builder Score' (Client has no Value Builder Score yet) and 'Value Builder Engagement Program' (Activate Engagement Program).

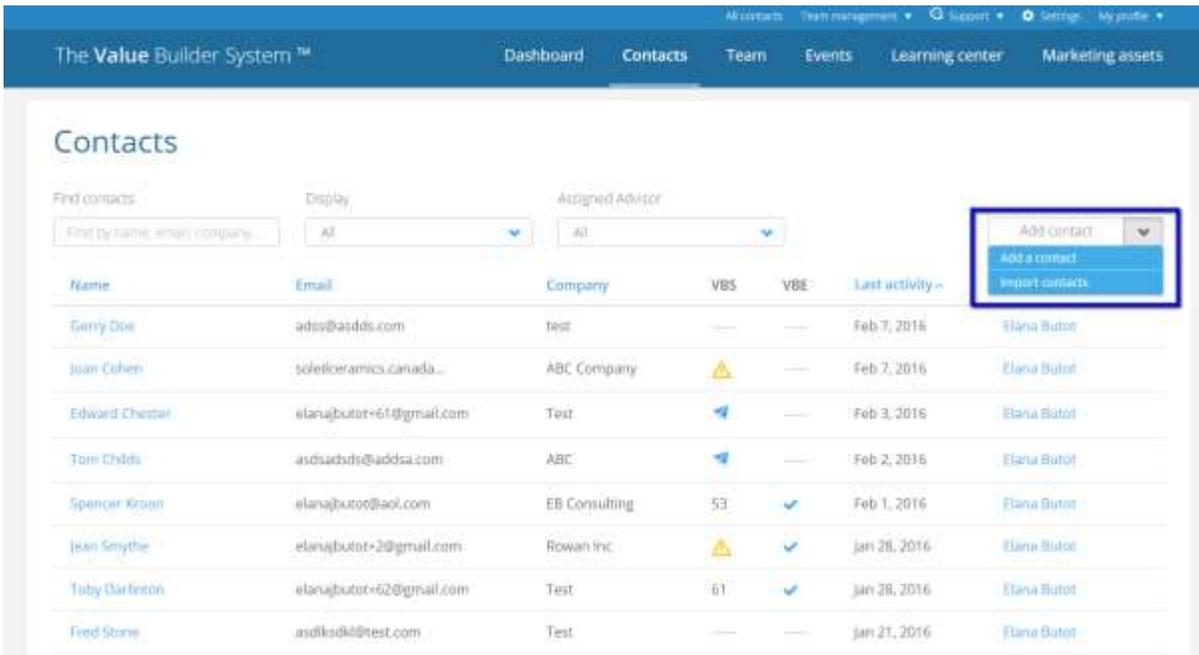
To deactivate the Nurture Cycle for a contact that is **Active**, click **Deactivate Nurture Cycle**.

The screenshot shows the 'Value Builder System' interface after the Nurture Cycle has been activated. A green notification banner at the top right states 'Nurture Cycle has been successfully activated for this contact'. The contact profile for 'Gerry Doe' is displayed on the left, with the 'Nurture Cycle' section highlighted by a blue box, showing 'Status: Active', 'Date activated: Feb 7, 2016', 'Emails sent: 0', and a 'Deactivate Nurture Cycle' button. The right side of the interface remains the same as in the previous screenshot.

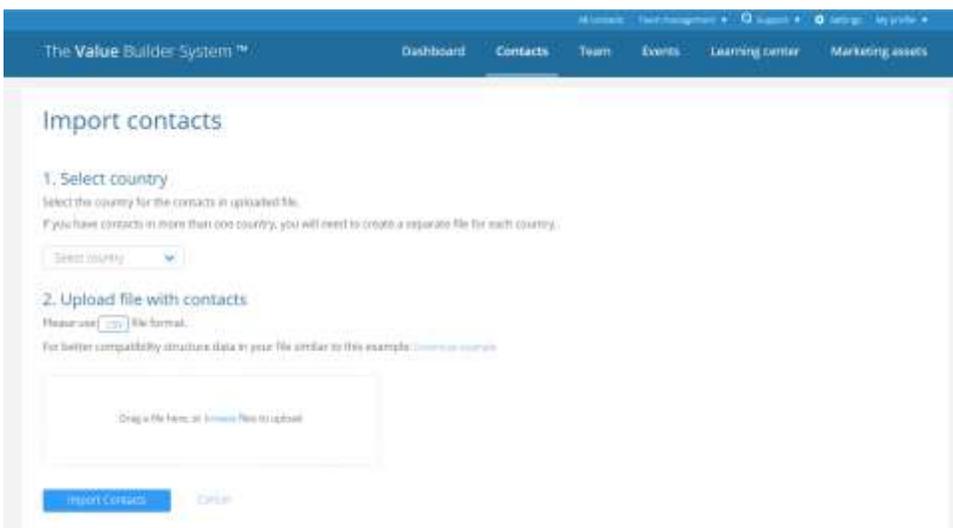
## 2. Bulk Import

Contacts can be added to the portal one at a time or through a bulk import. To add one contact, go to **Contacts** and click **Add contact**. To import a group of contacts from a CVS file, go to **Contacts** and click **Import contacts**. When importing contacts in bulk, you have the opportunity to:

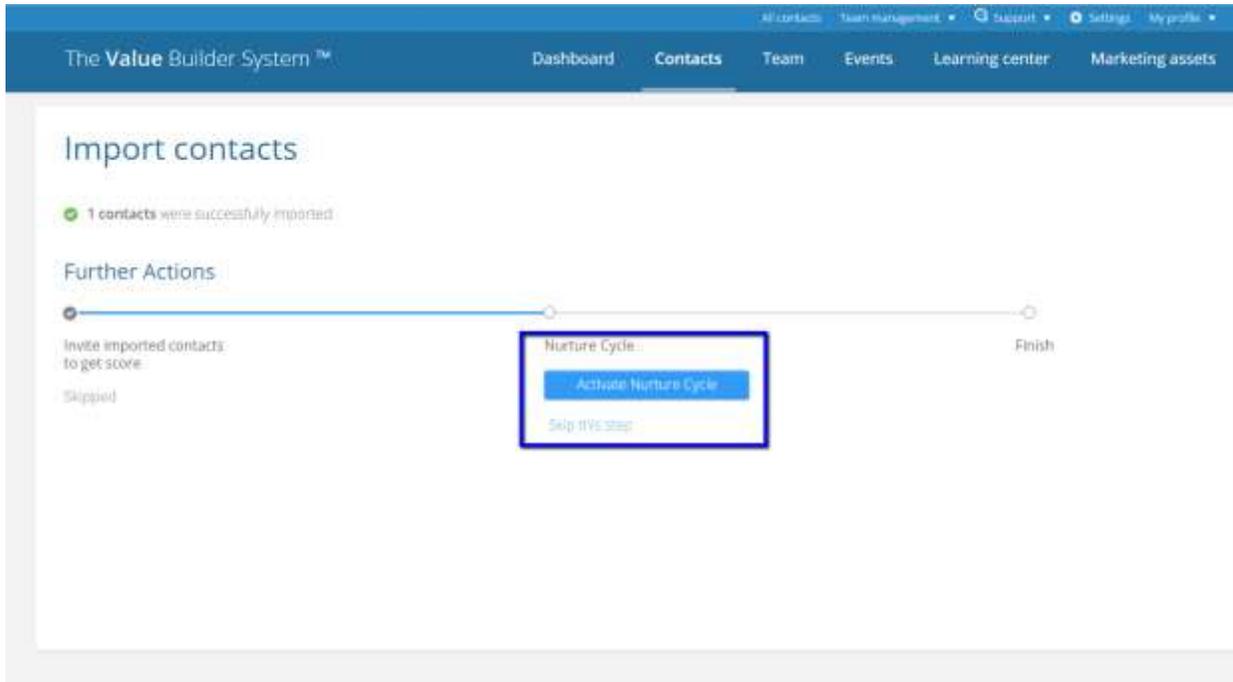
- Invite all contacts from the import to complete the questionnaire
- Activate the Nurture Cycle for all imported contacts



Select the country applicable for the import. All contacts in an import must be from the same country. If you would like to invite or nurture several, but not all contacts from an import, break the import down into batches. All contacts in one import will be treated the same way (e.g., all contacts from one country, all invited or not, all nurtured or not).



Once you have imported your contacts, choose whether or not to activate them in your Nurture Cycle. To activate the Nurture Cycle for all contacts just imported, click **Activate Nurture Cycle**.



If you don't want to activate the Nurture Cycle right away or if you want to activate contacts manually, click **Skip this step**. You can always activate or deactivate a contact later. Go to **Settings > Nurture Cycle > Subscription management** to review and update multiple contacts at a time or go to **Contacts** and select the individual contact you want to nurture.