Sola Salon Studios - Overview of Utilizing Sequences

Sequences are a powerful way to automate personalized outreach, ensuring no lead slips through the cracks. They help you stay consistent, save time, and keep follow-ups on track, freeing you up to focus on building relationships and moving deals forward.

This guide will walk you through:
- How to Create a Sequence
- How to Enroll Contacts into a Sequence
- How to Check on Sequence performance

63 Steps   View most recent version

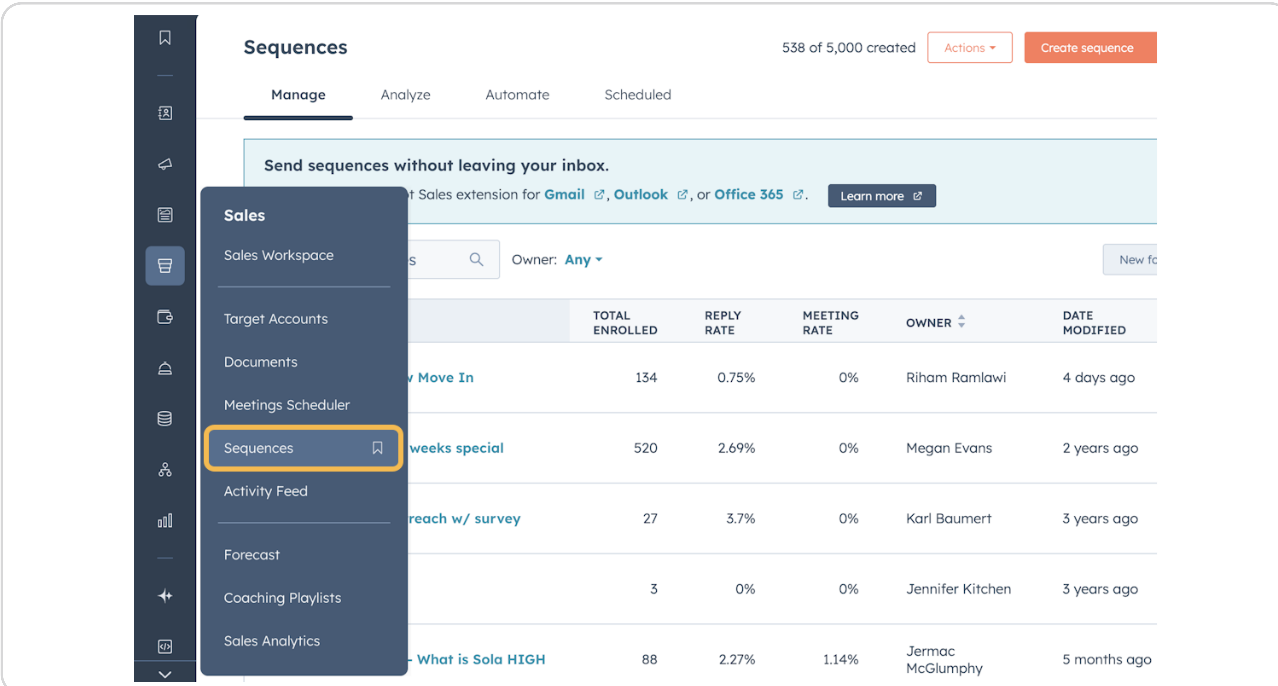
Created by	Creation Date	Last Updated
Doug Davidoff	Aug 11, 2025	Aug 12, 2025

Accessing the Sequences Page

4 Steps

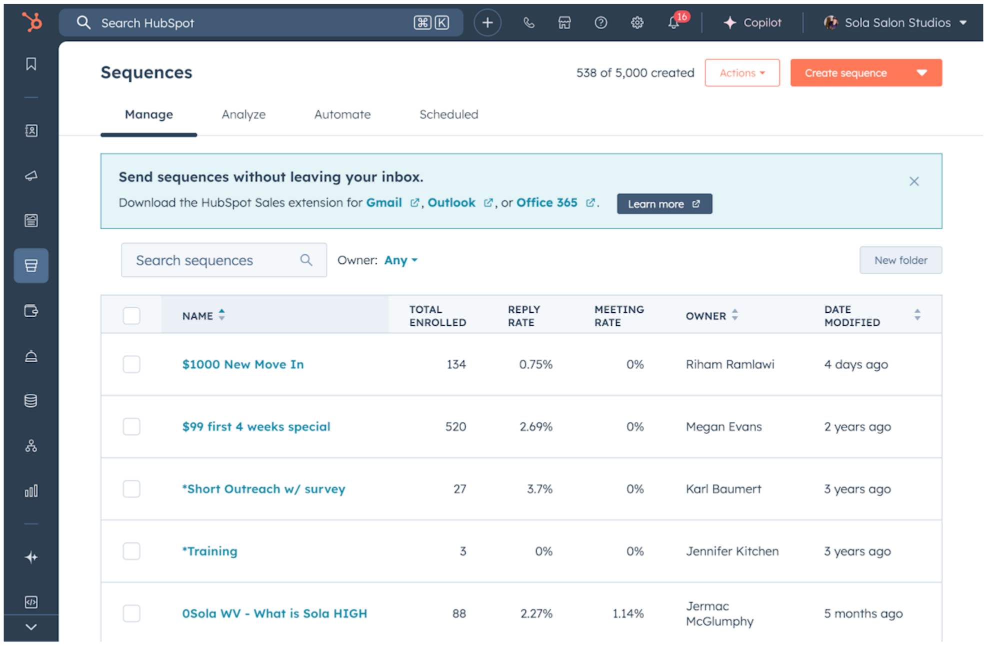
STEP 1

Go to the Sales section of the Navigation and Click on Sequences



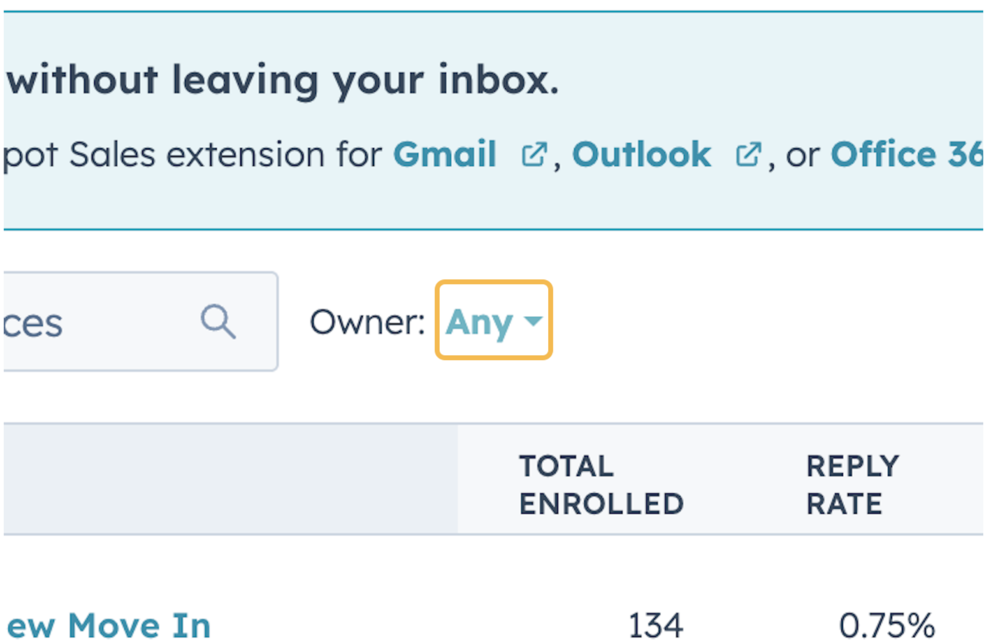
STEP 2

You'll be taken into the Sequences page



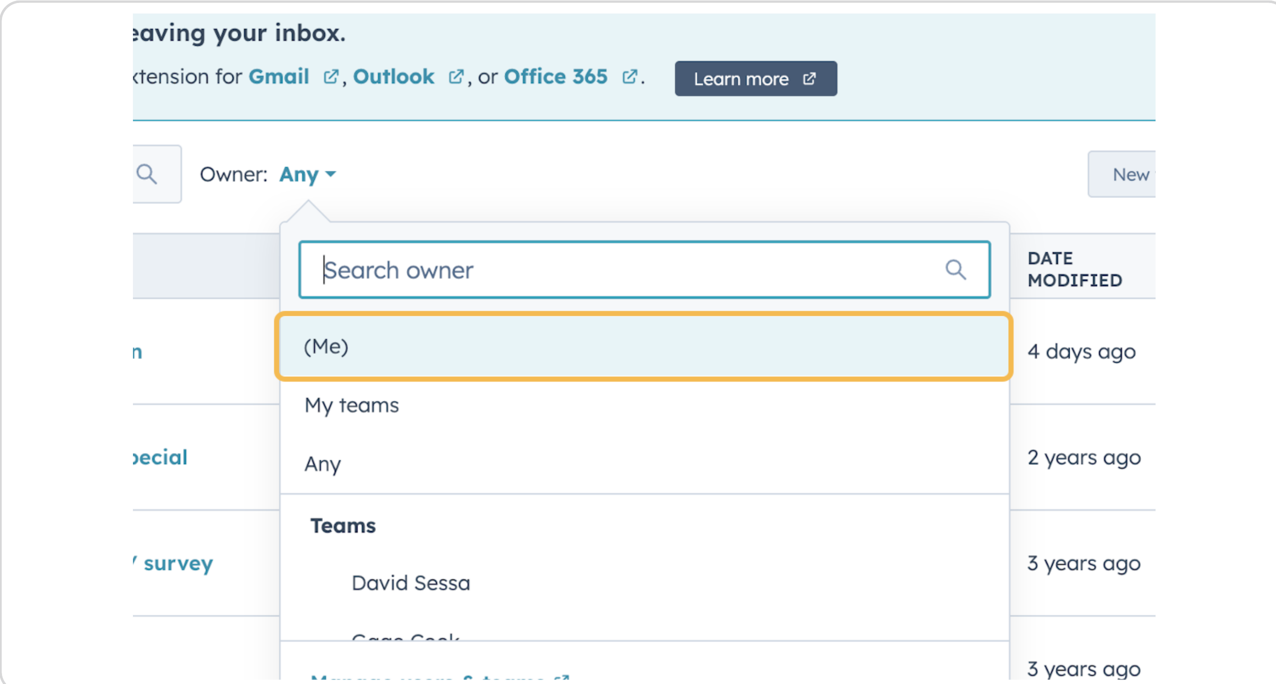
STEP 3

To easily find the Sequences you've built, Click on the Owner dropdown



STEP 4

Click on (Me)

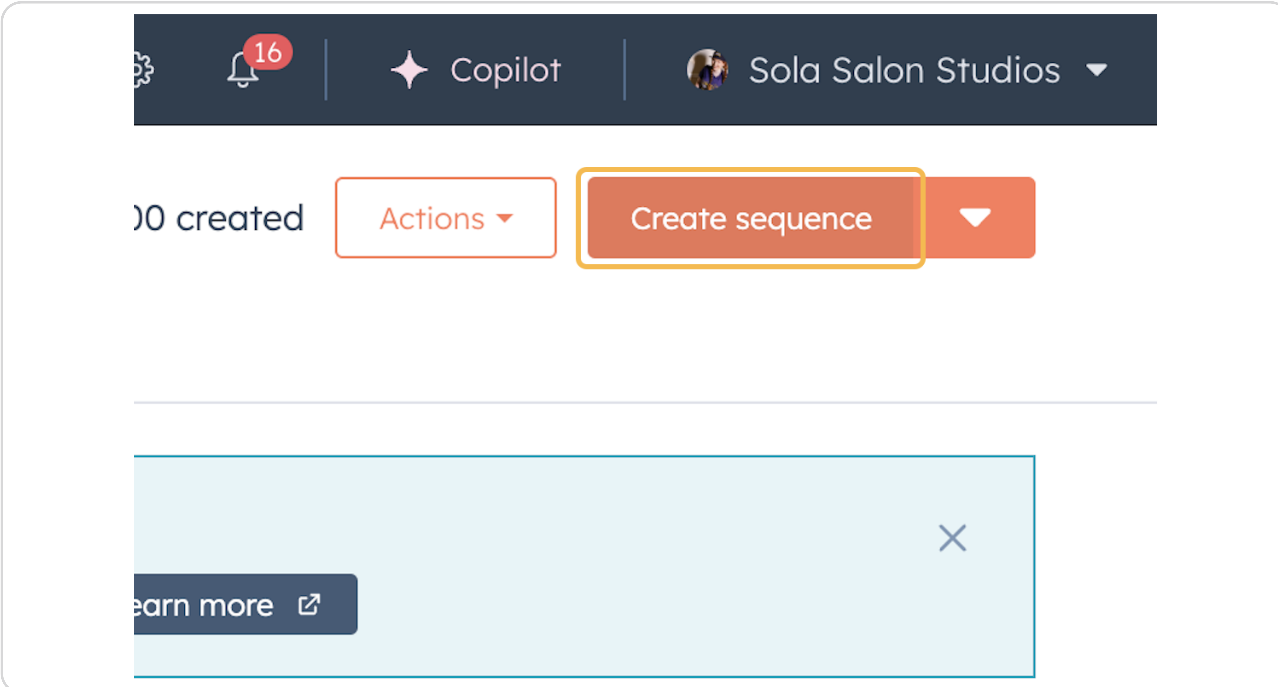


Creating a Sequence

31 Steps

STEP 5

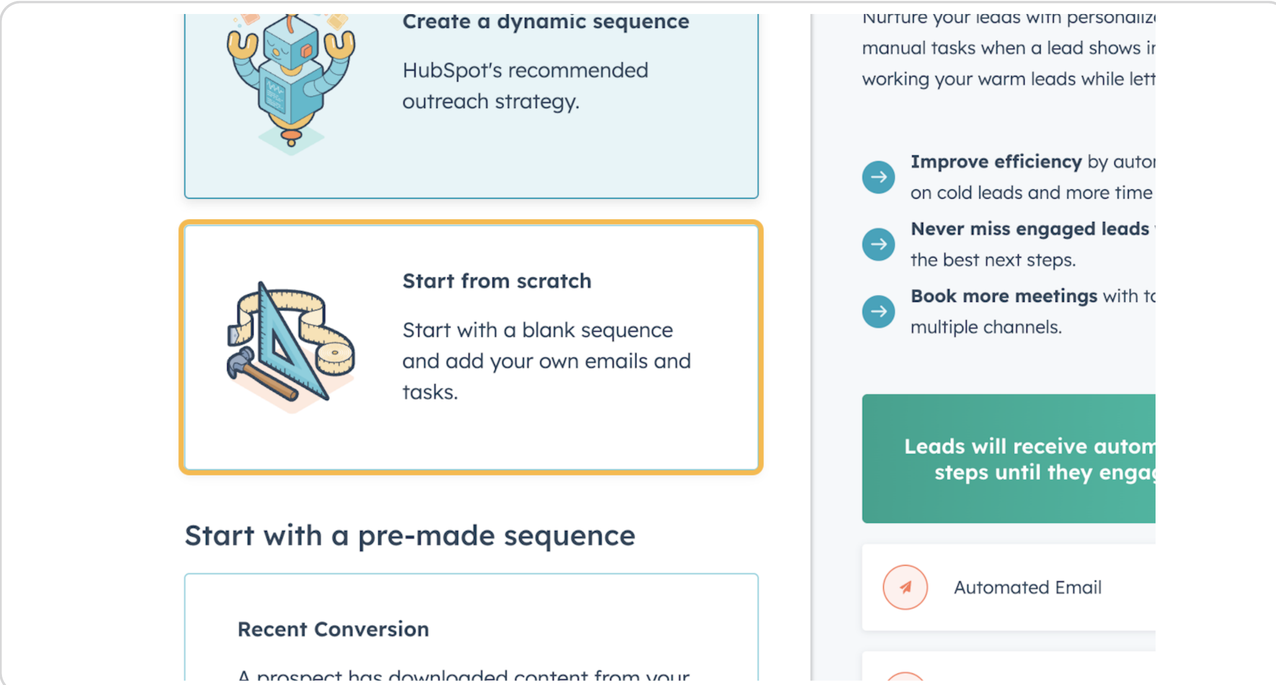
Click on Create sequence



STEP 6

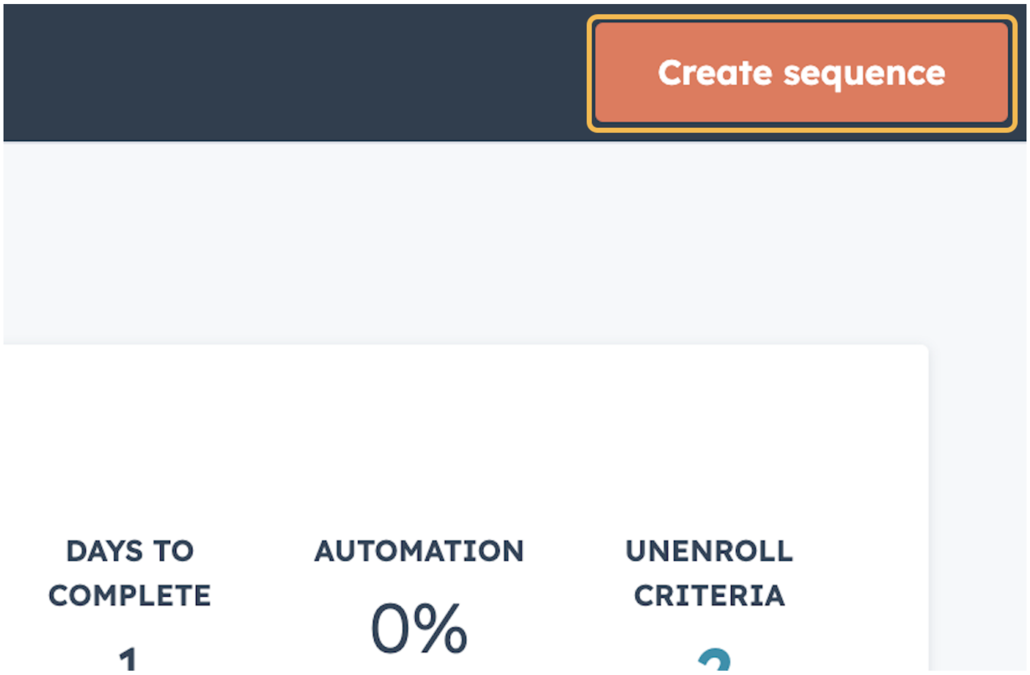
Click on Start from scrath

Note: There are other options you can choose from. Starting from scratch give you the flexilibity to add the steps you want rather than having to delete steps you don't need.



STEP 7

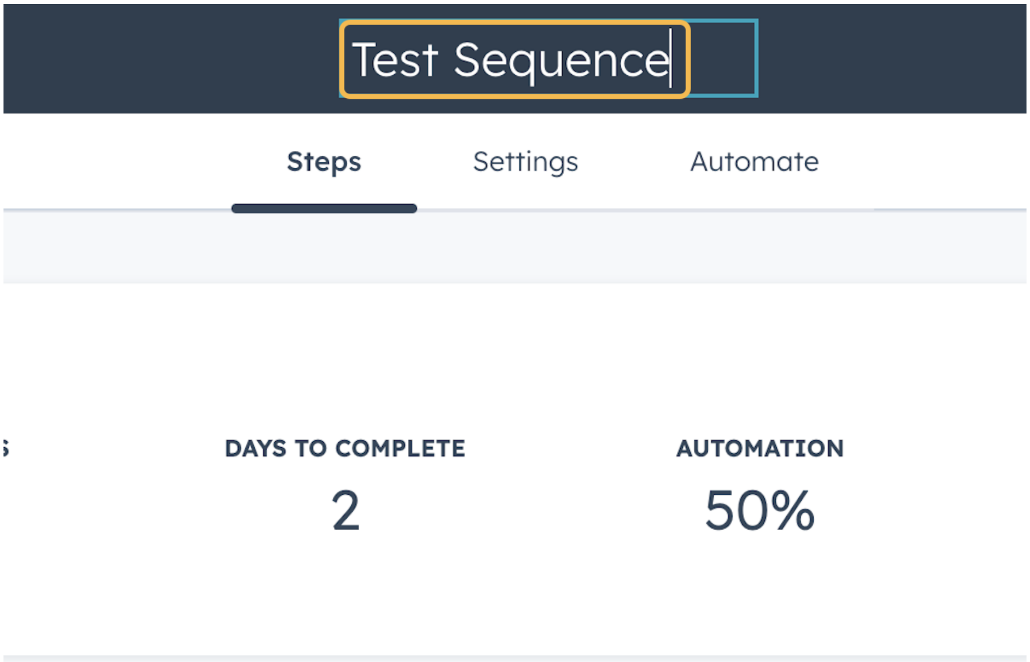
Click on Create sequence



STEP 8

Give your Sequence a name

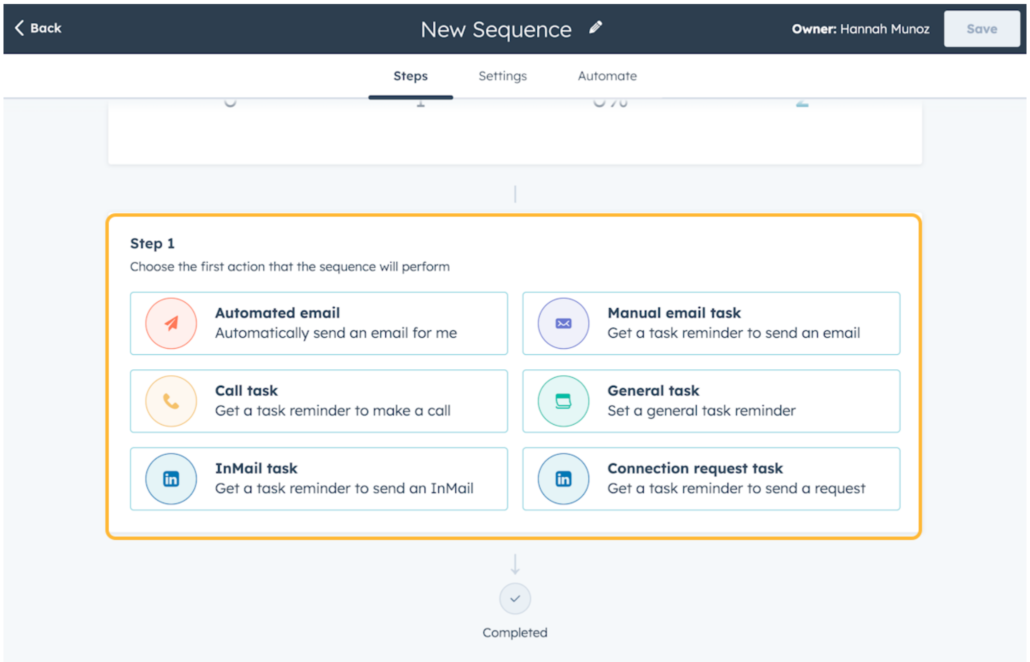
Note: Naming conventions are important to have so you can easily find your Sequence and know off the bat what that Sequence is about.



STEP 9

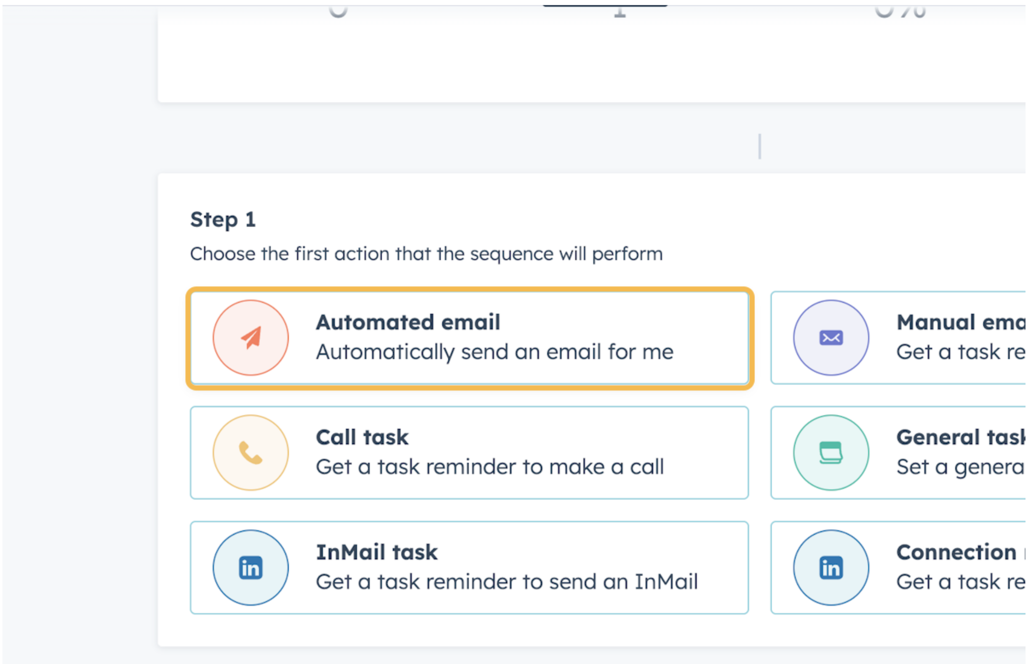
Now you can start to edit your Sequence

There are a few different steps you can utilize. Note that you will not need to worry about the InMail task or Connection request task. Focus on the top 4 options.



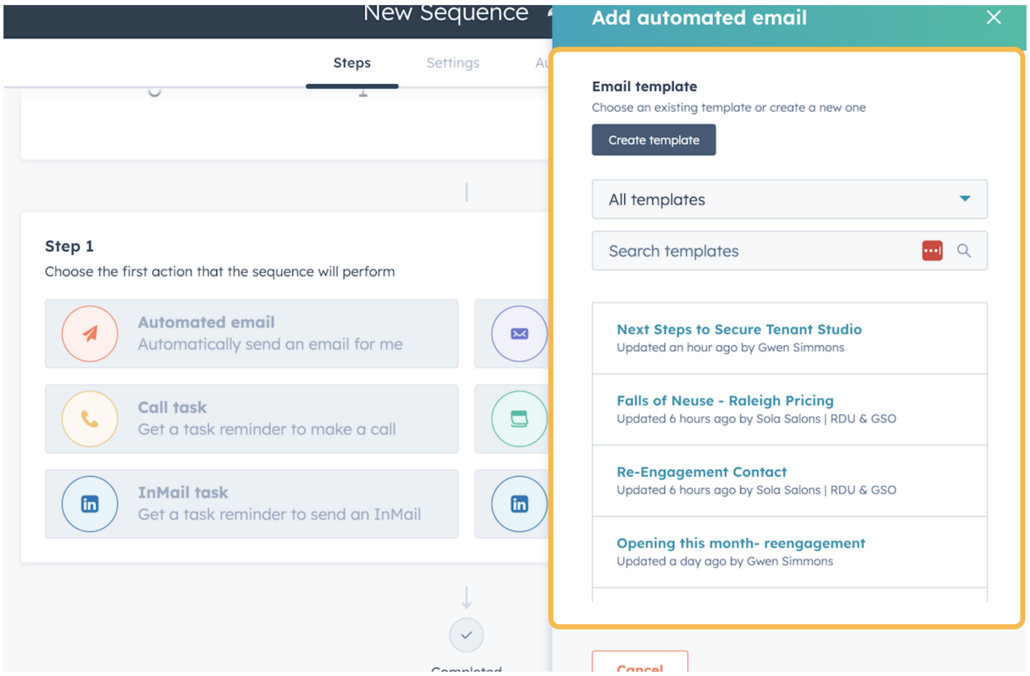
STEP 10

To show a few examples, Click on Automated email



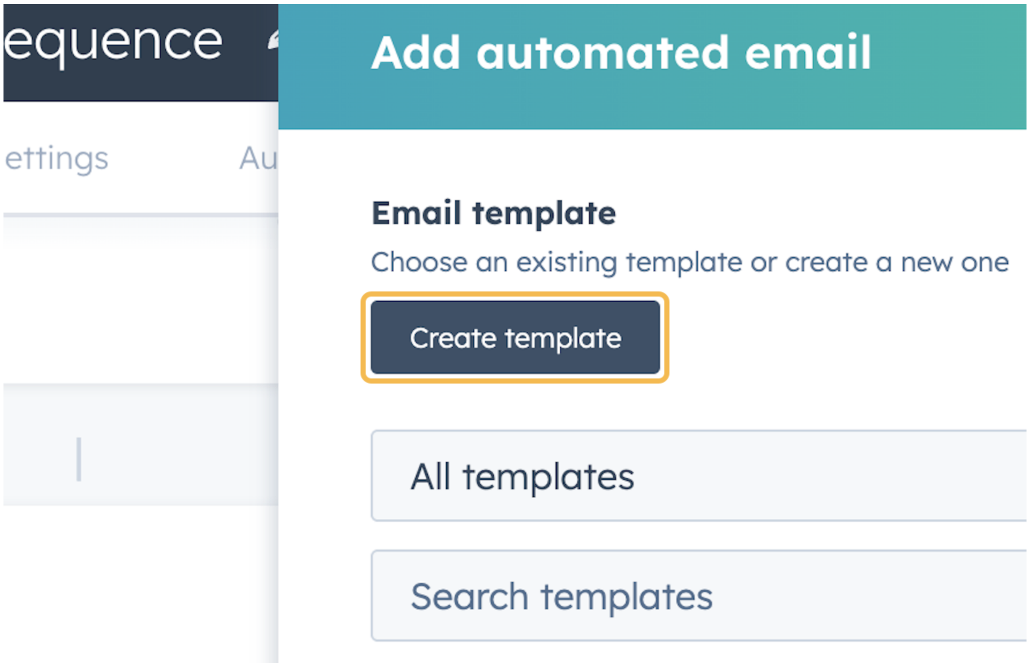
STEP 11

You will need to use an email template for this step. You can either search for an email template already created or create a new one.



STEP 12

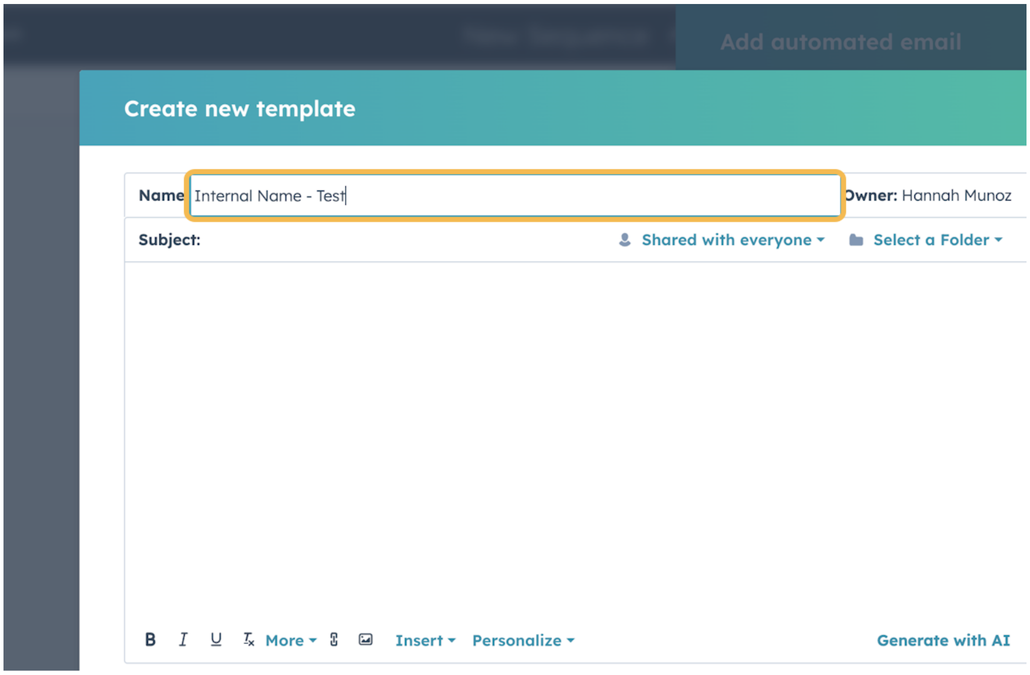
Click on Create template



STEP 13

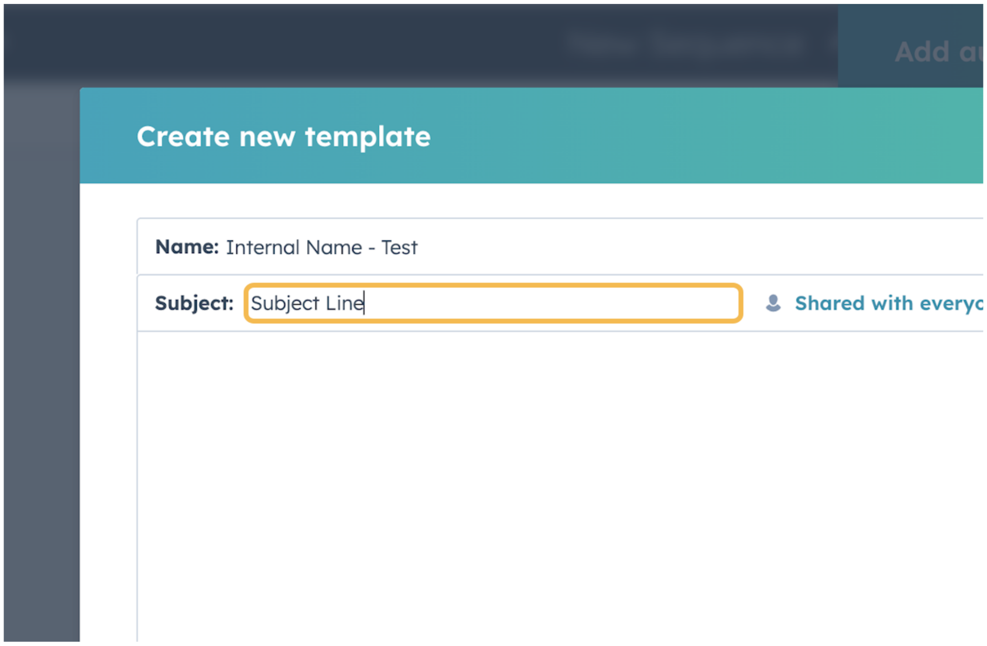
Give your email template a Name

Note: This is an internal name. You will want a naming convention for any of your email templates.



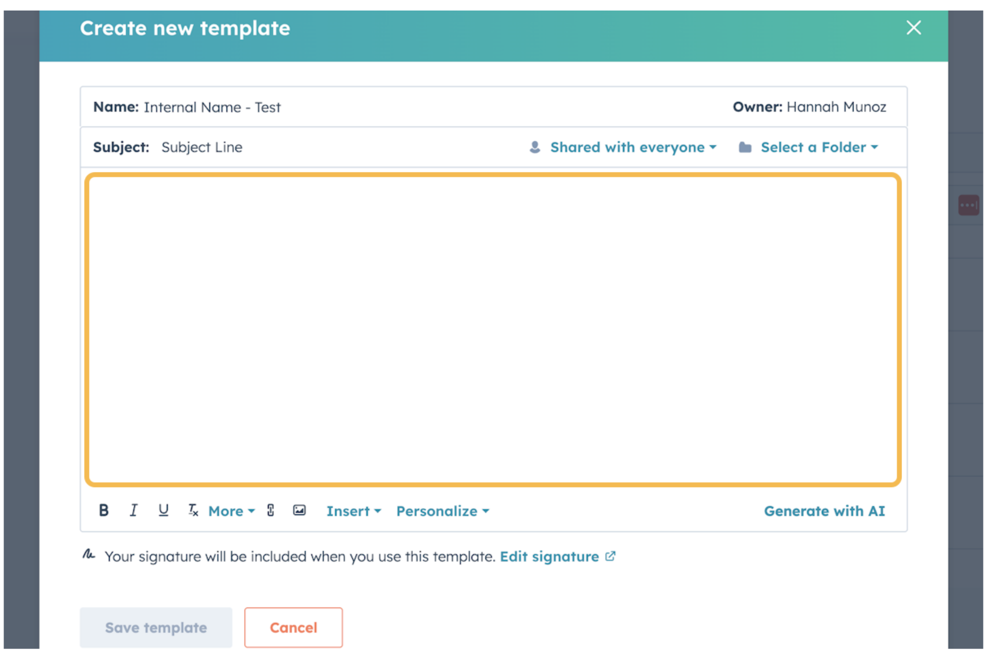
STEP 14

Include a Subject line



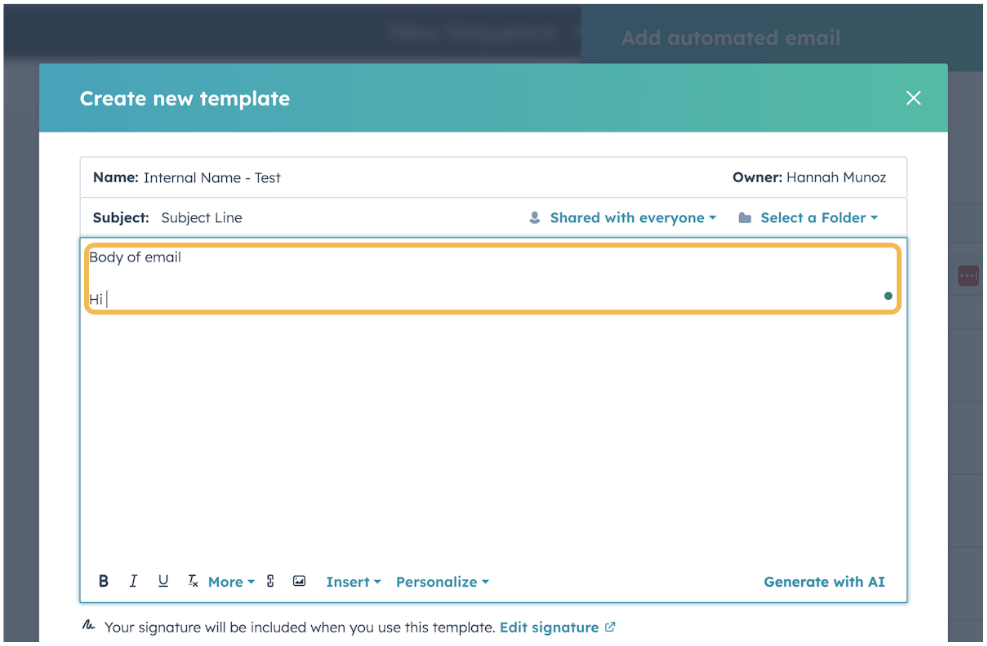
STEP 15

Include the body text of the email



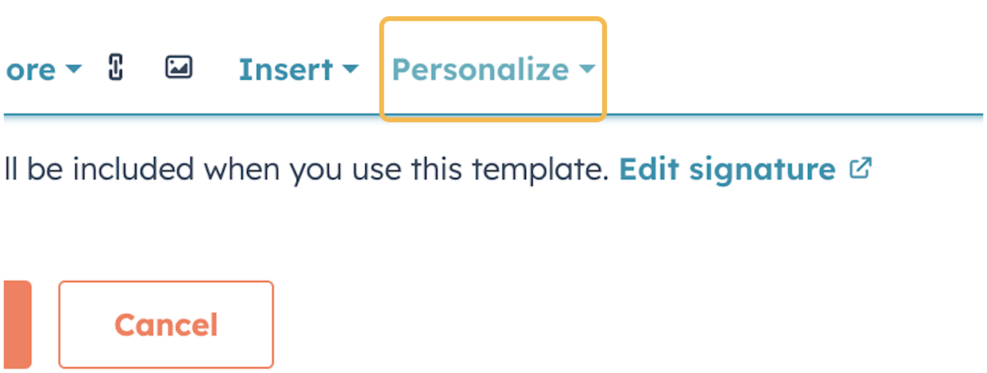
STEP 16

To personalize the email, you can use personalization tokens



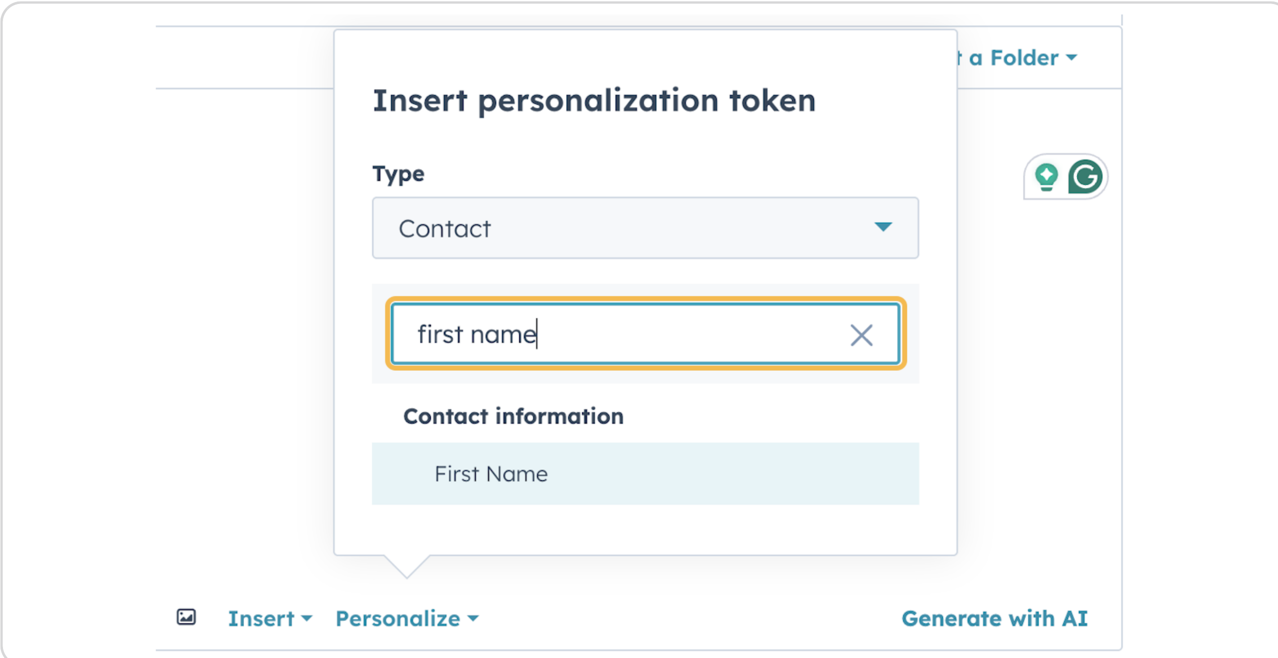
STEP 17

Click on Personalize



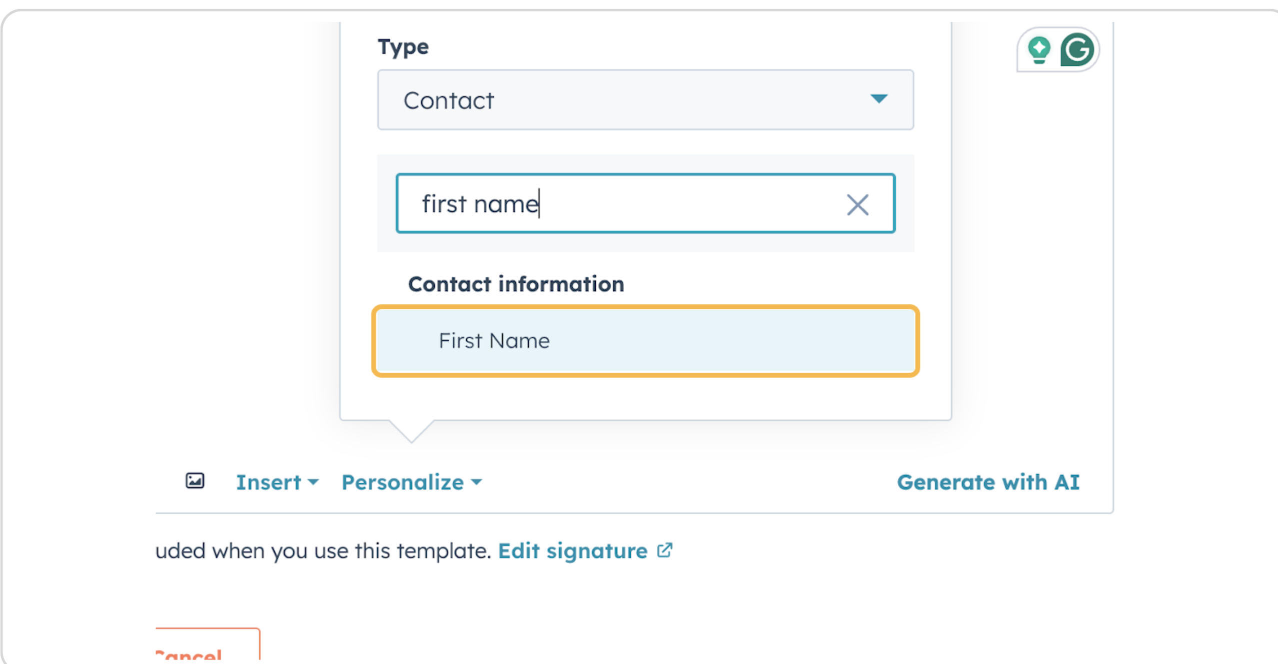
STEP 18

Search for the token you want to insert



STEP 19

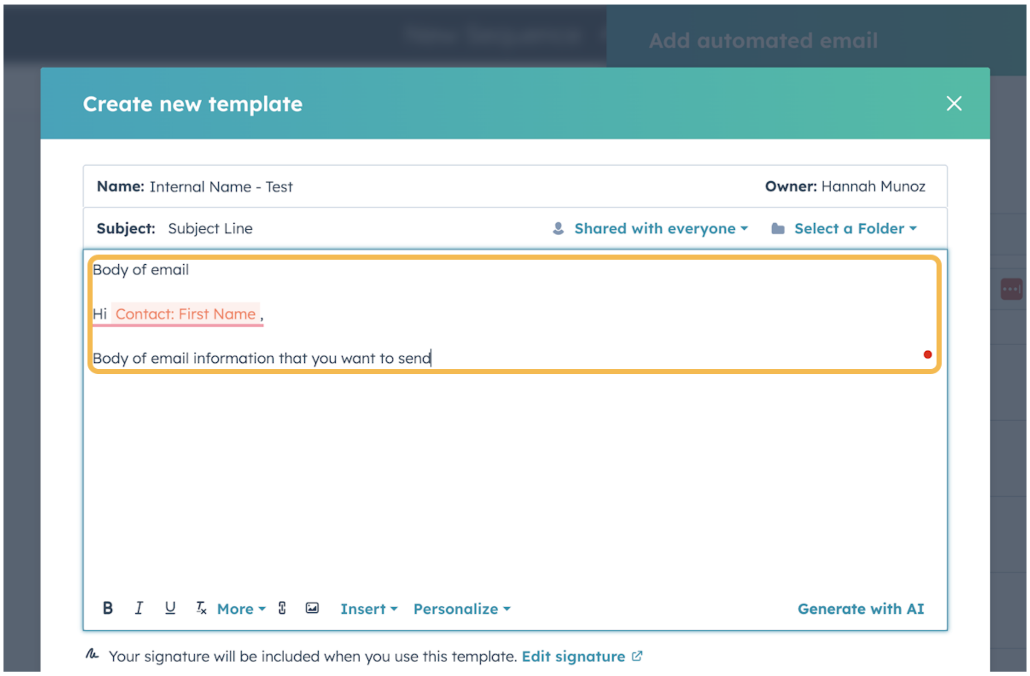
Click on First Name



STEP 20

This token will be included in the email. Continue on and finish the body of the email

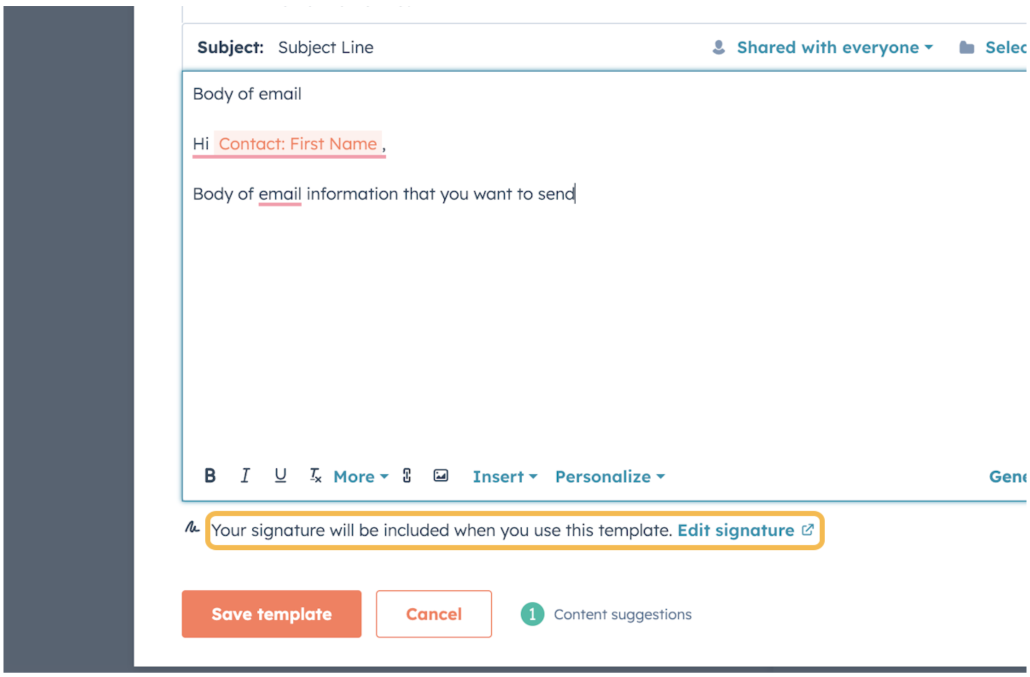
Note: Tokens will pull in information from the Contact record. Tokens are great to help personalize the email more rather than the email being standard across the board.



STEP 21

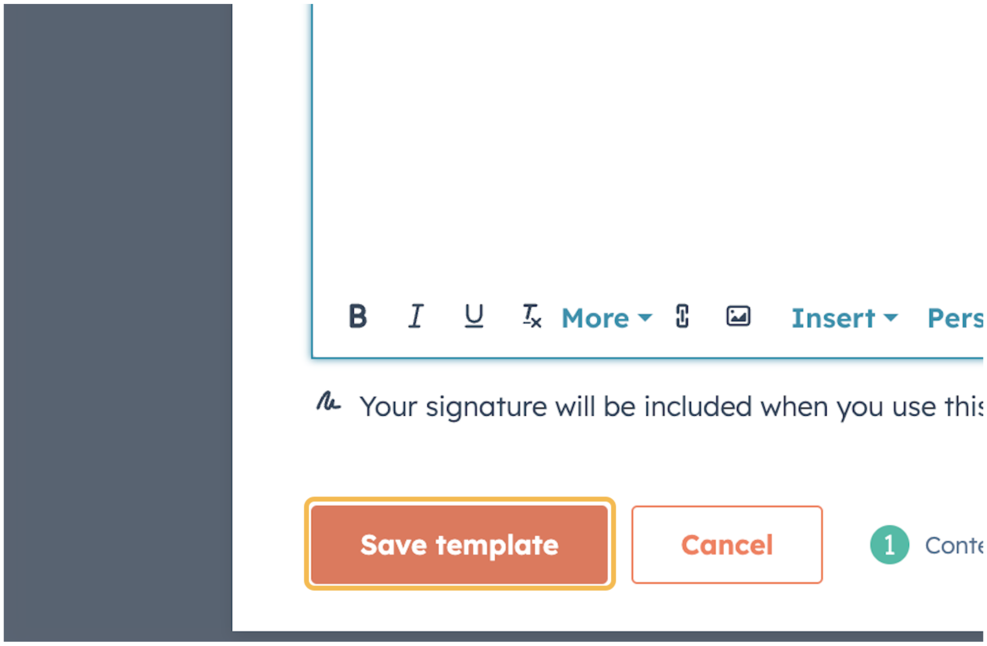
Make sure you have updated your email signature. This will be included at the end of the email

Note: Your email signature should include the following: NameTitlePhone NumberAnything else you want to include you can!



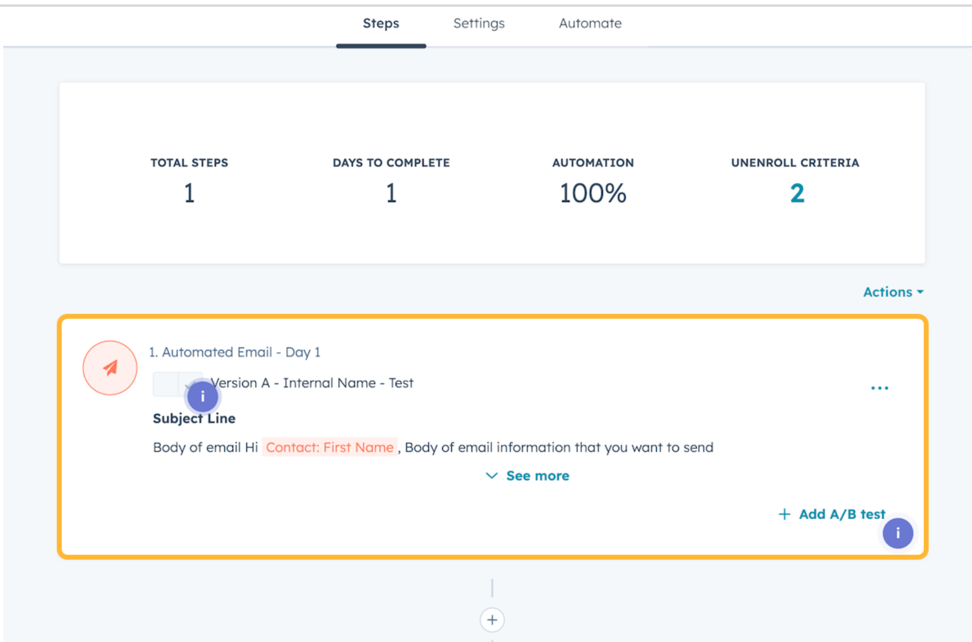
STEP 22

Click on Save template



STEP 23

The email has been added to your Sequence

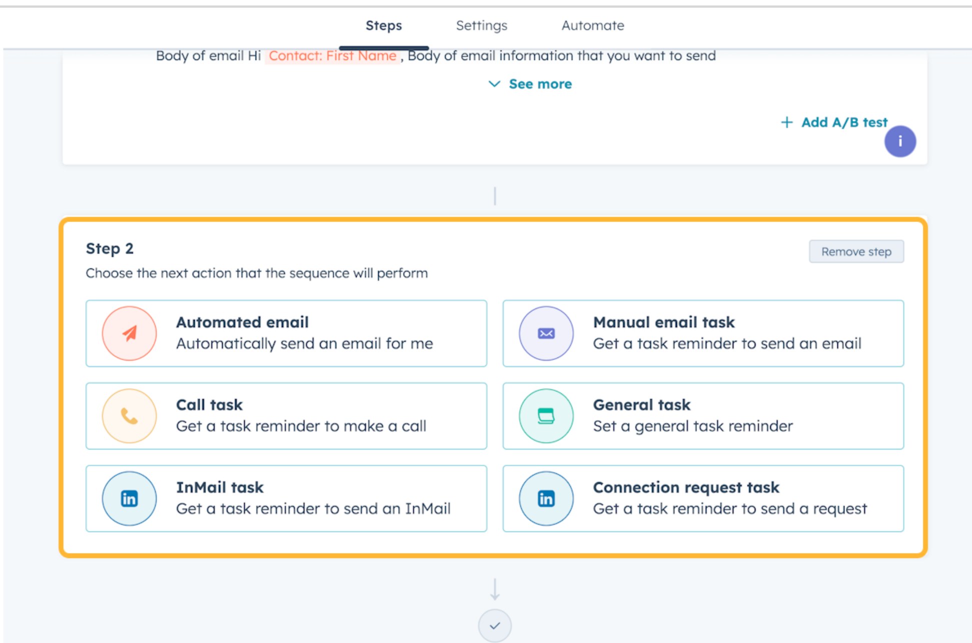


STEP 24

To add another step, Click on Add

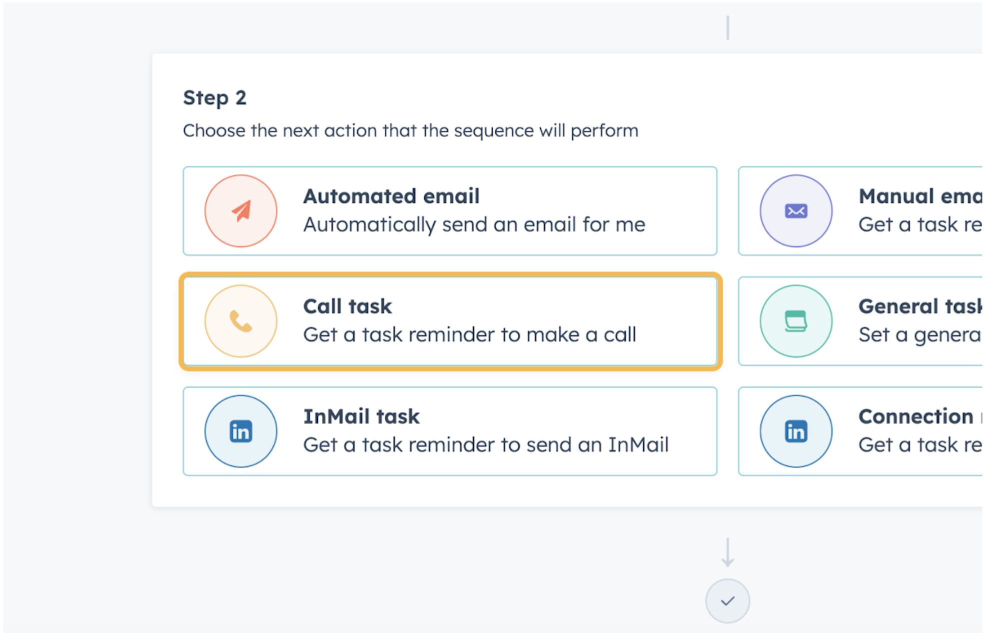
STEP 25

Select another step



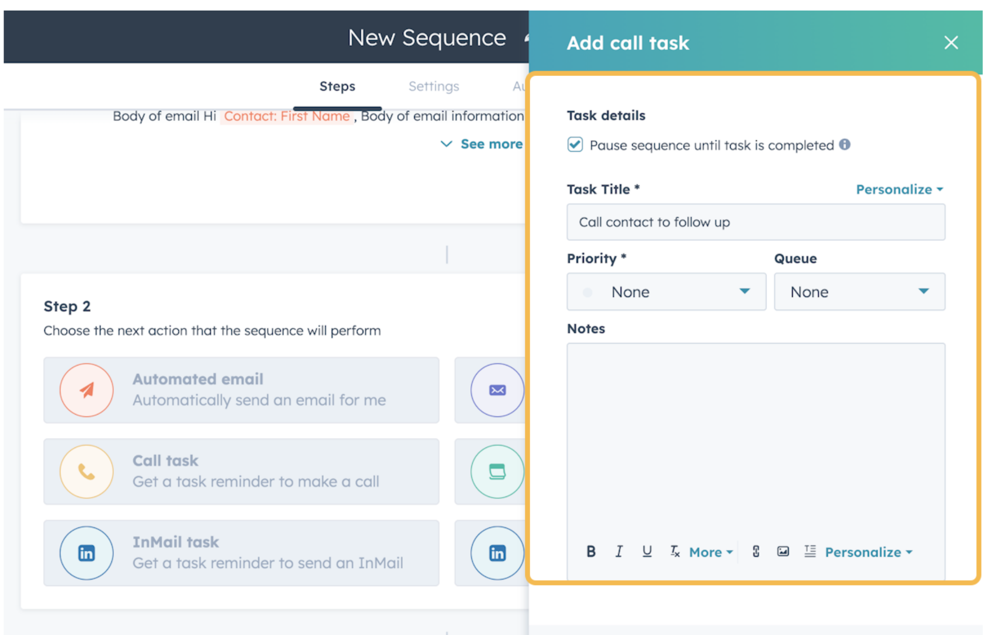
STEP 26

Click on the next action item



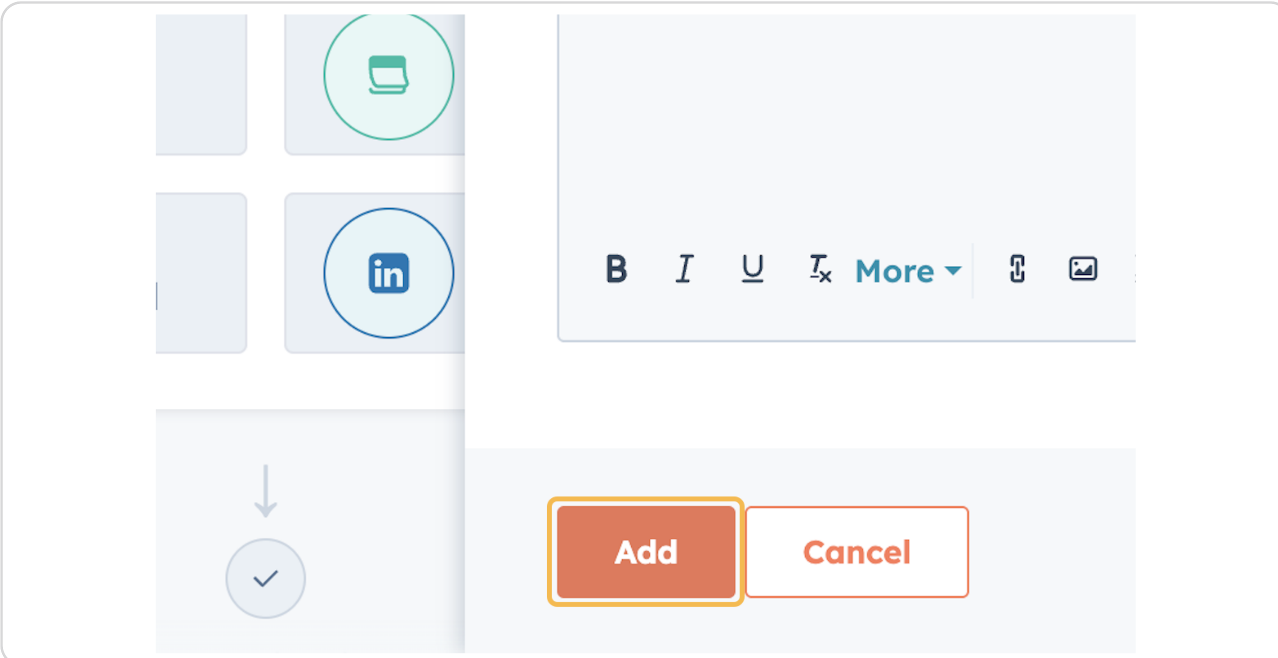
STEP 27

Fill out the details necessary



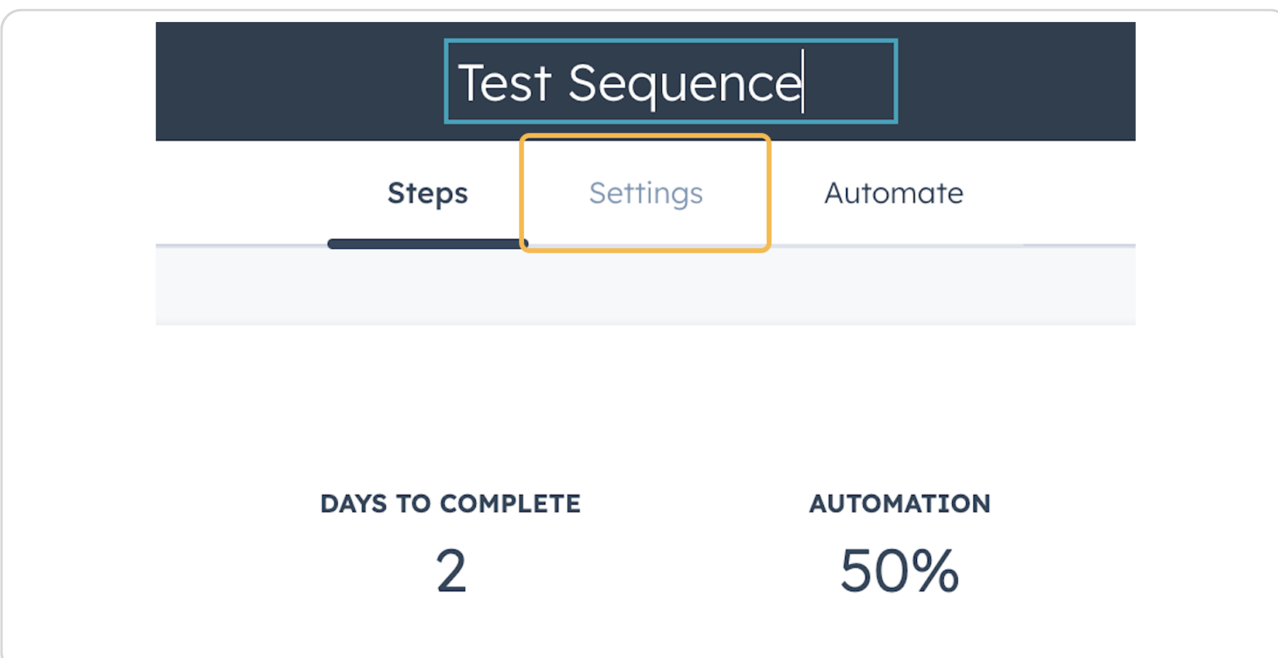
STEP 28

Click on Add



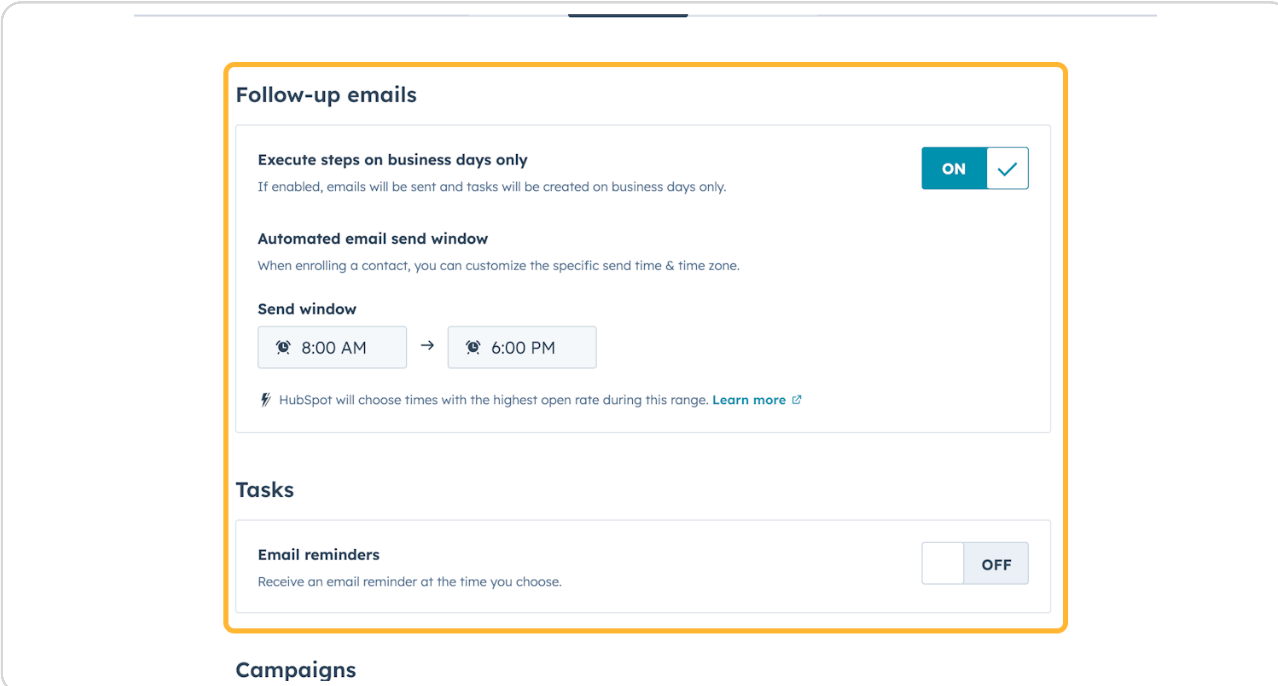
STEP 29

Once your steps are in place, Click on Settings



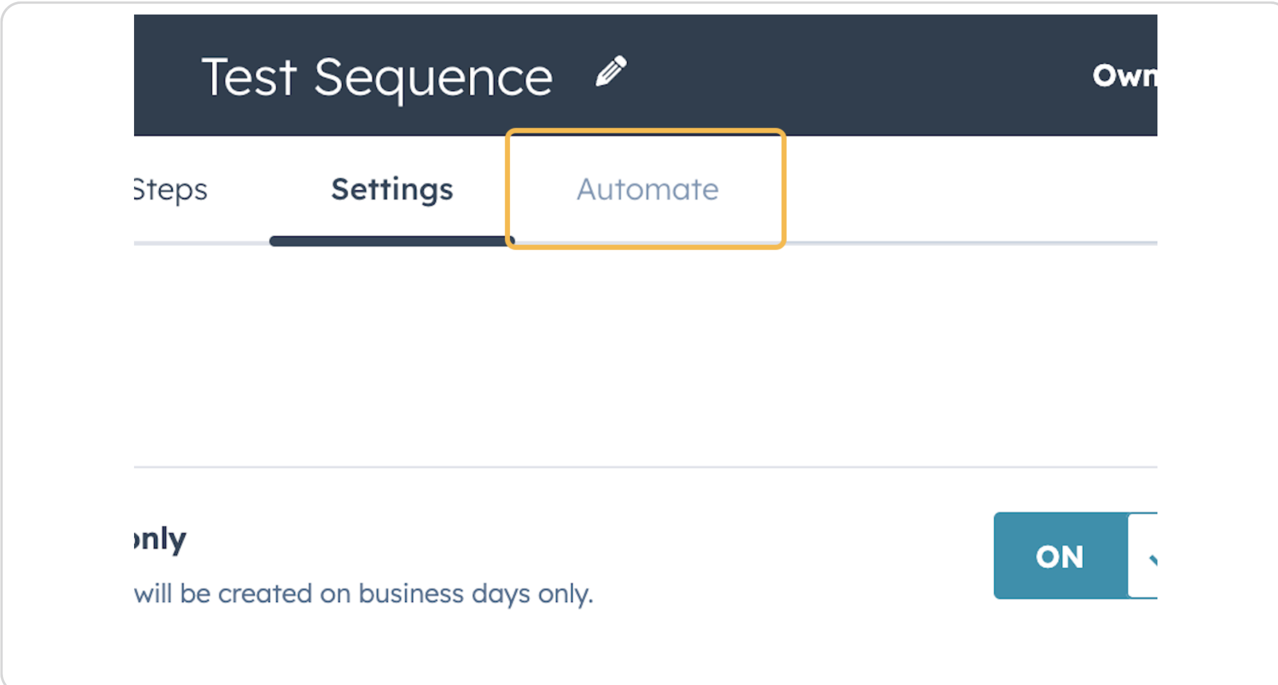
STEP 30

Here you can choose when emails can go out and if you want email reminders for your tasks



STEP 31

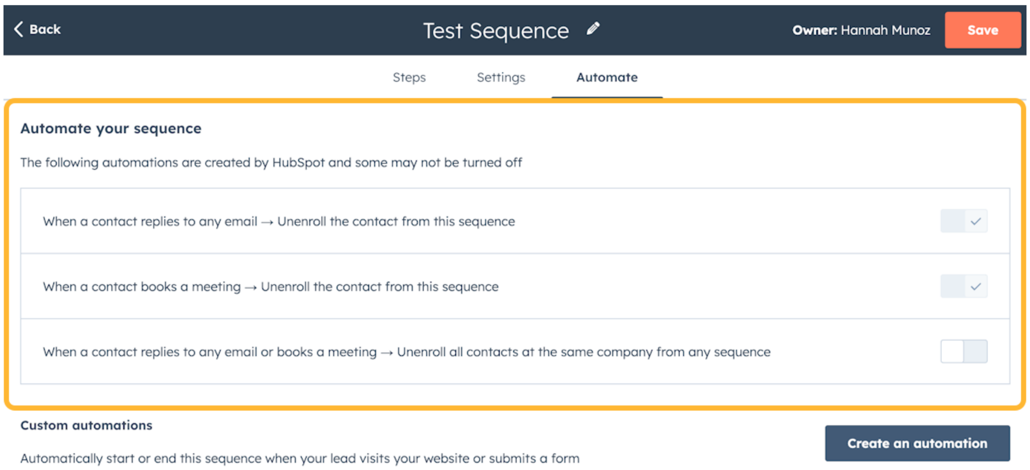
Once your Settings are good, Click on Automate



STEP 32

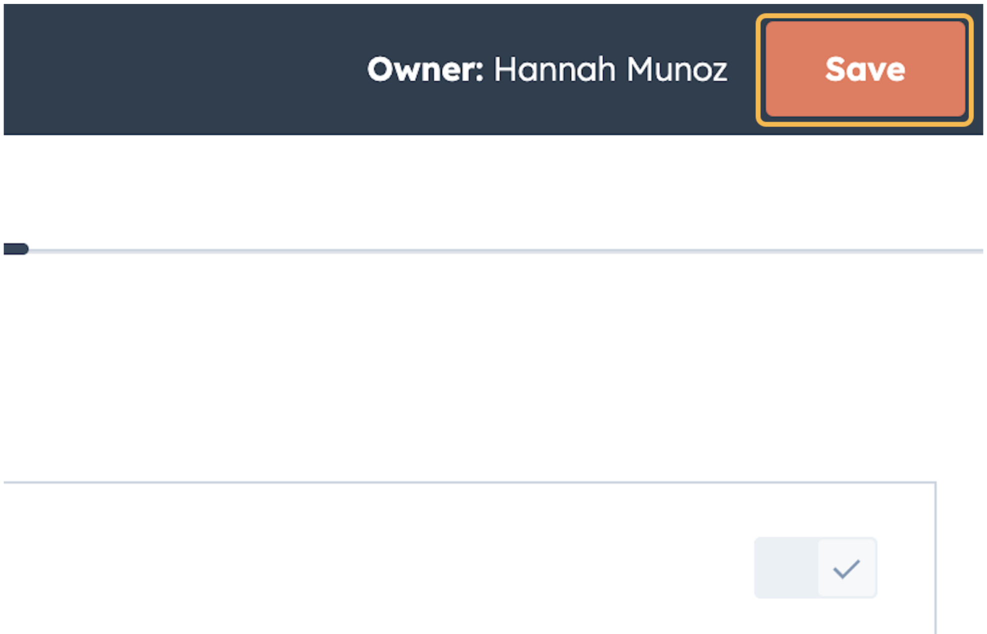
Here you can choose when to unenroll contacts

Note: The first two options are already checked on and are grayed out. This is needed to be CAN-SPAM compliant with sales emails. You cannot change these. If a contact responds to an email or books a meeting with you, they will be unenrolled from the sequence so you can continue the conversation with them.



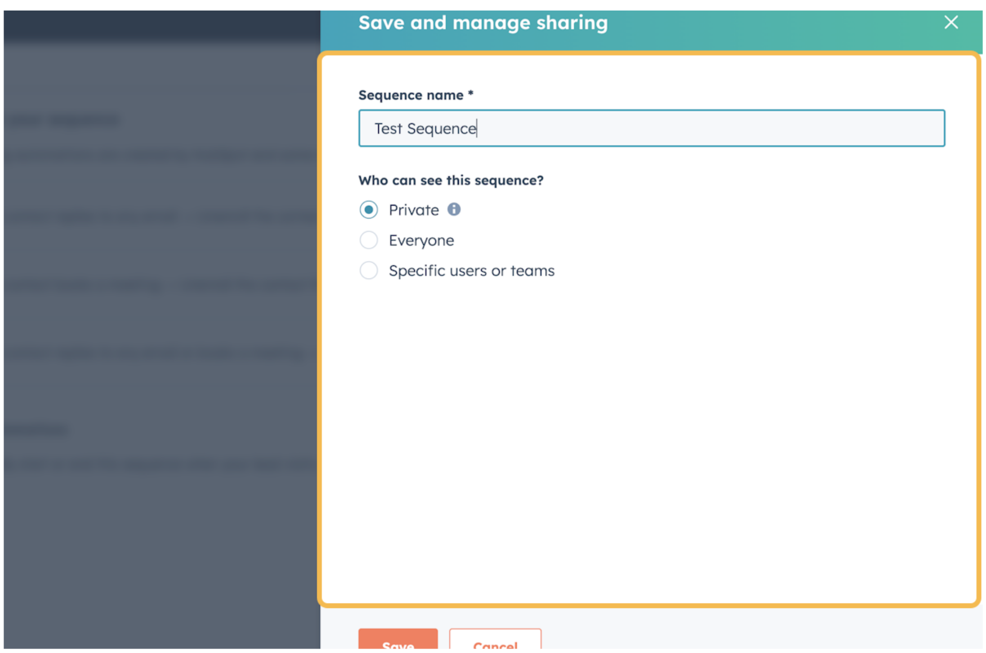
STEP 33

Click on Save



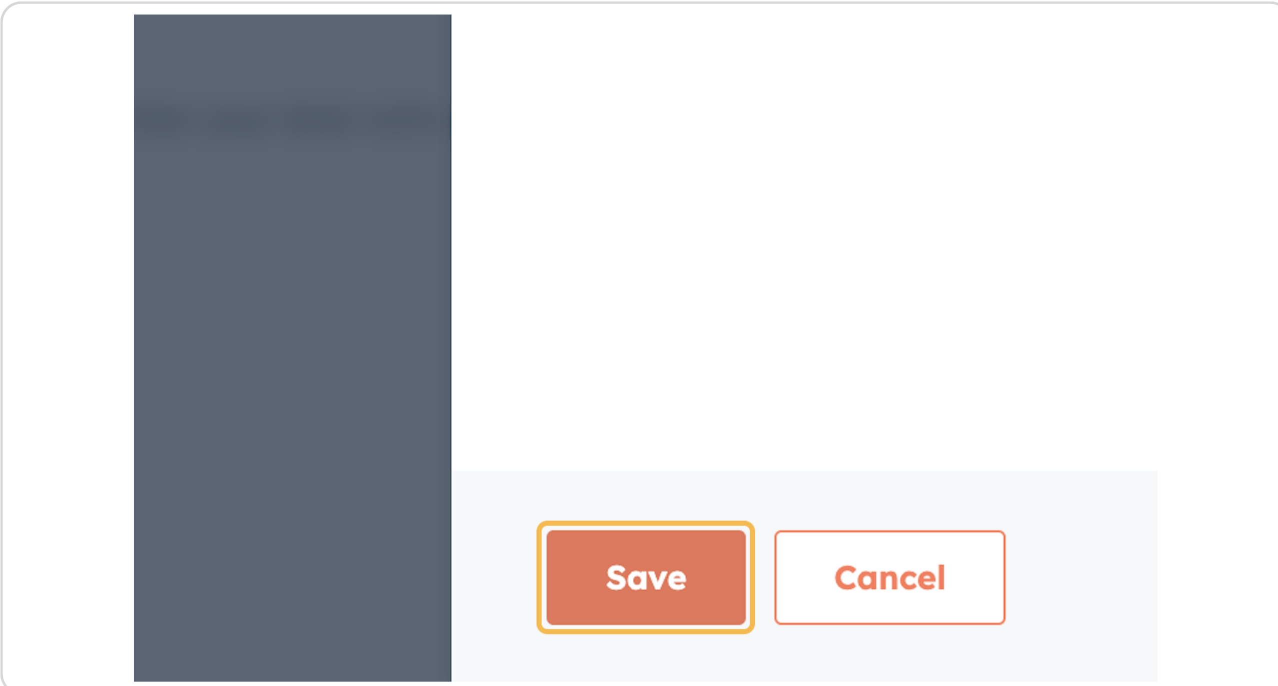
STEP 34

Make sure your Sequence has a name and choose who can see the Sequence



STEP 35

Click on Save



Enrolling Contacts into a Sequence

20 Steps

There are two ways we'll look at adding Contacts to Sequences: On the SequenceThrough Contacts

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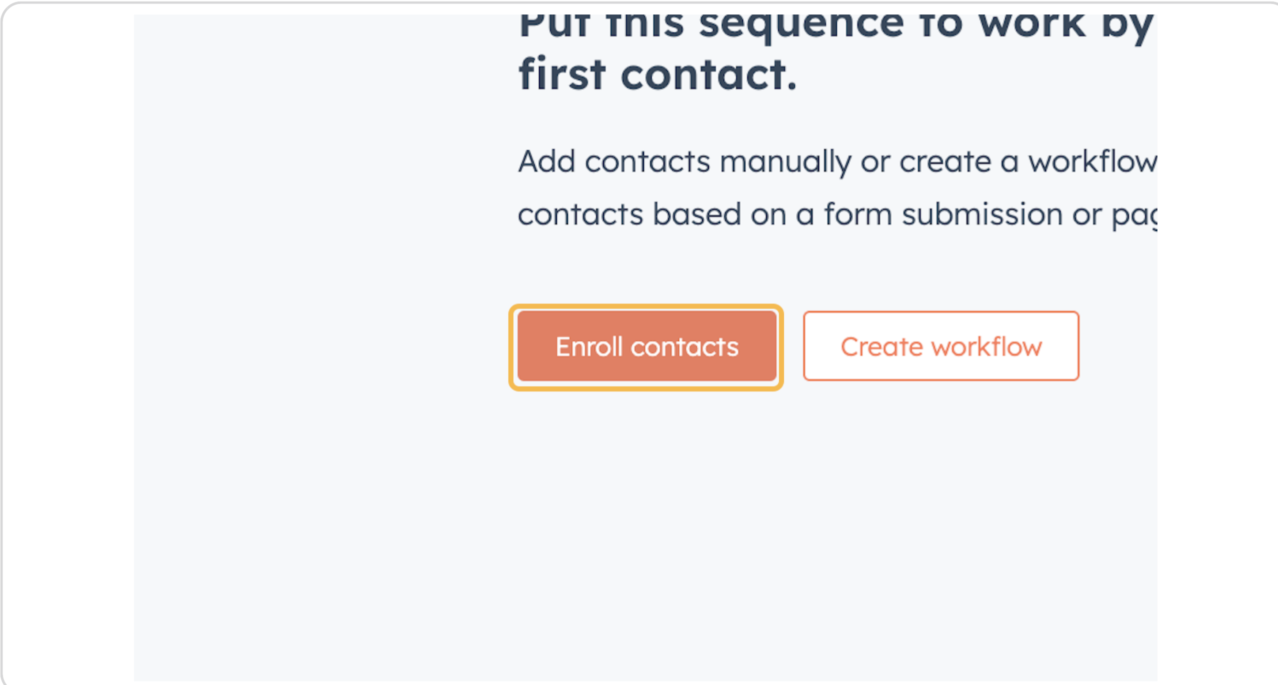
STEP 36

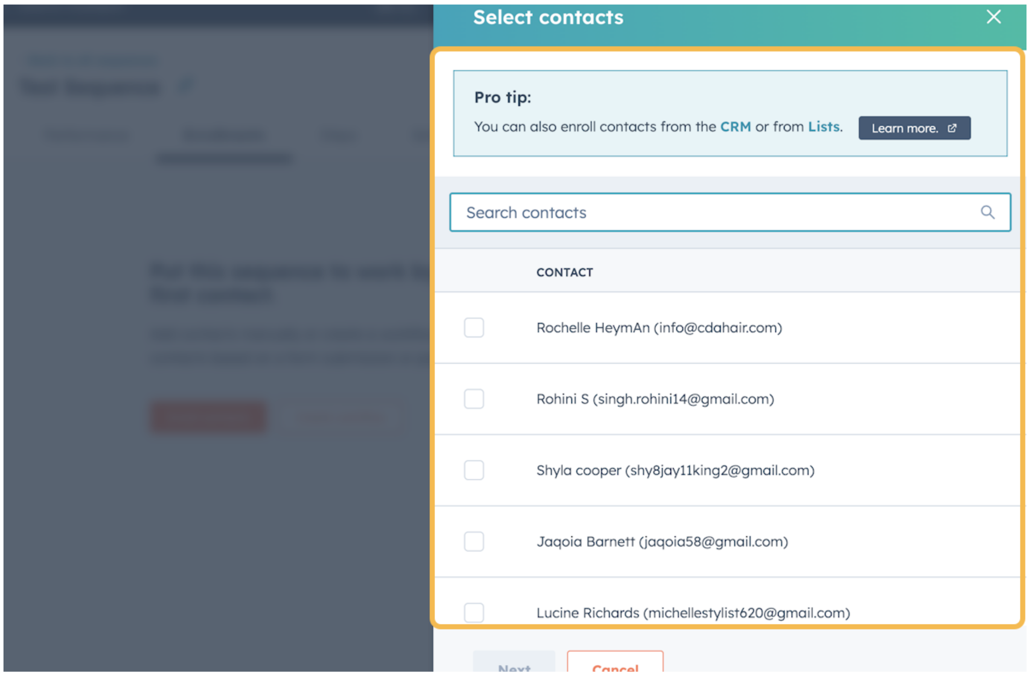
On the Enrollments tab of your Sequence, Click on Enroll contacts



STEP 37

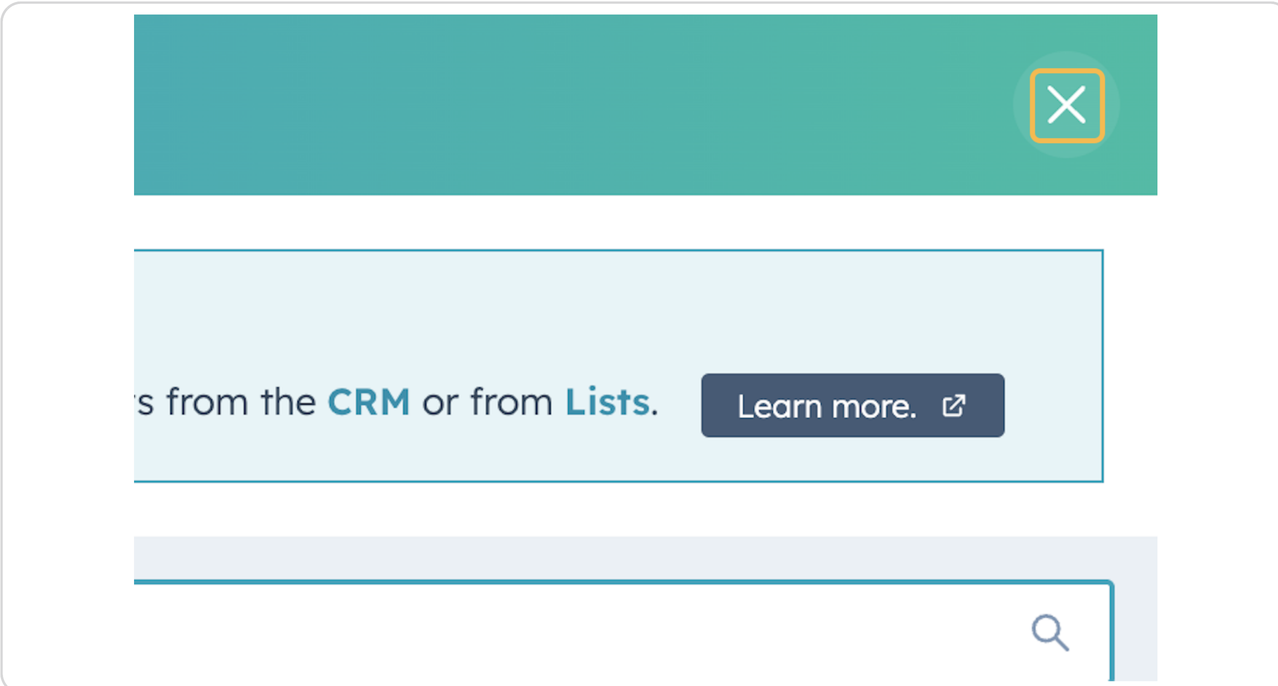
Here you will need to search for the Contact and follow the steps to add them to the Sequence

Note: This is not practical for adding a lot of Contacts. If you have one or two you need to add, this can be an easy way.



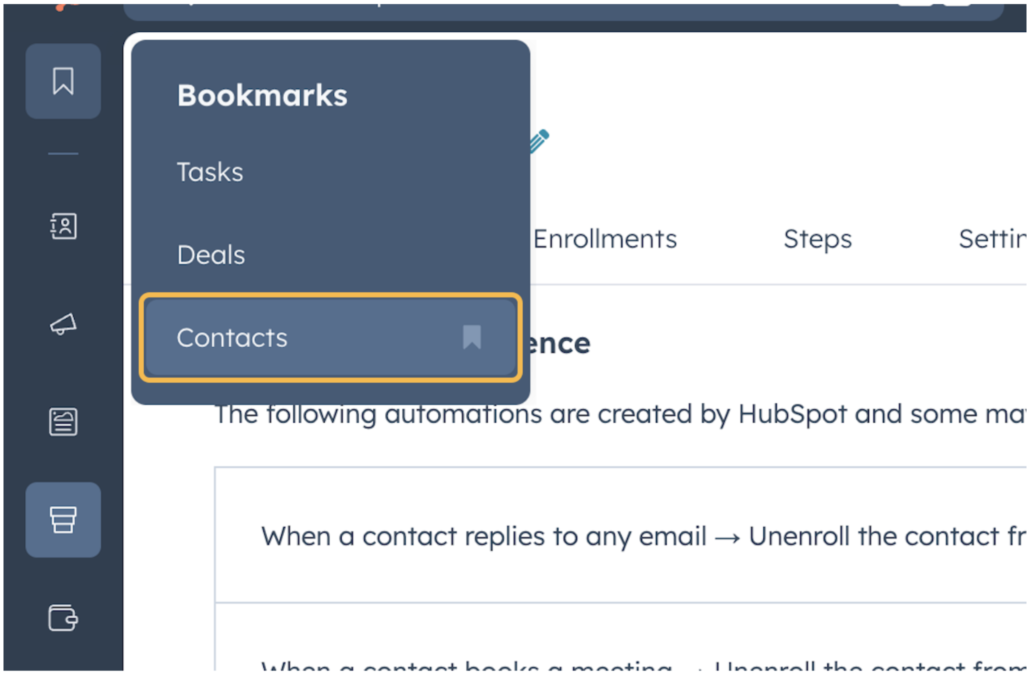
STEP 38

Click on Close



STEP 39

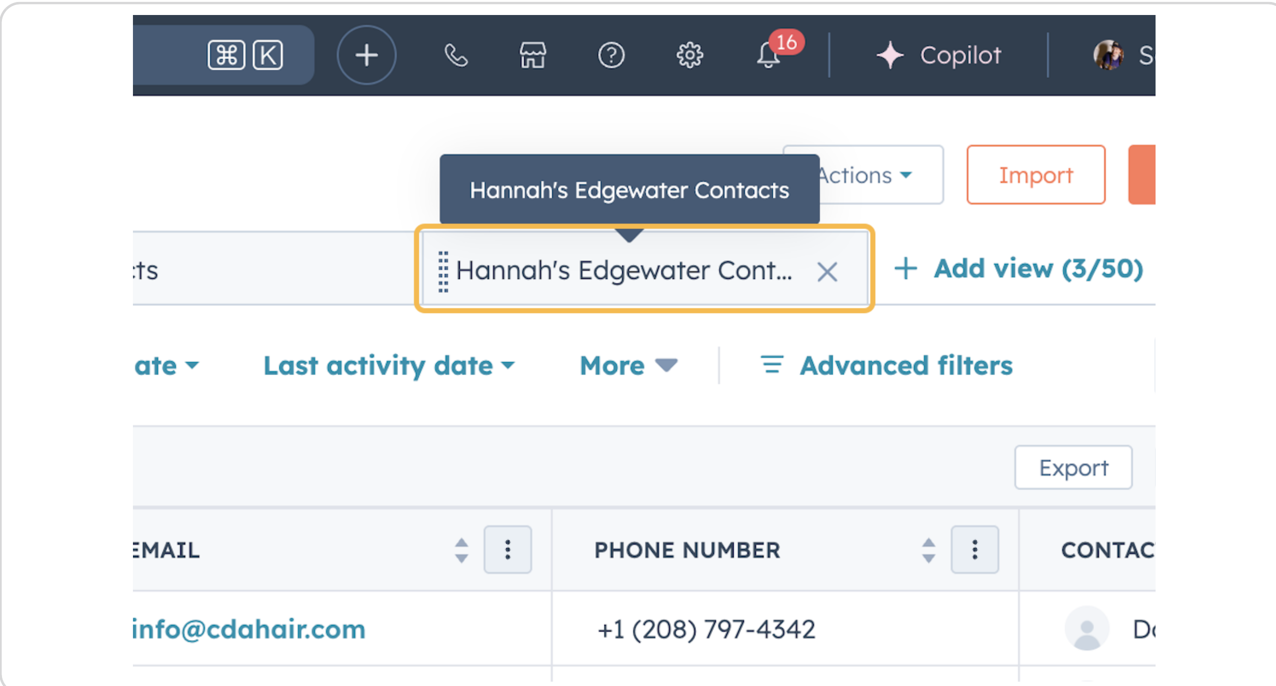
The other option is to go through Contacts. Go to your Bookmarks and Click on Contacts



STEP 40

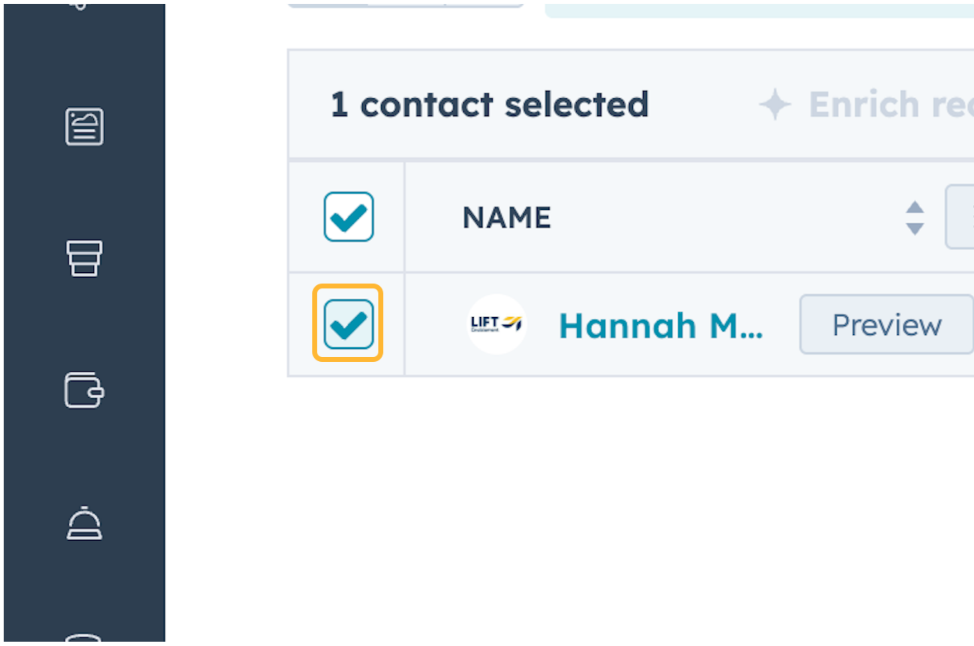
Choose a tab of Contacts you want to choose from

Note: This could be a tab that is already filtered down or a tab like My Contacts where you can choose the filters before adding the Contacts to the Sequence.



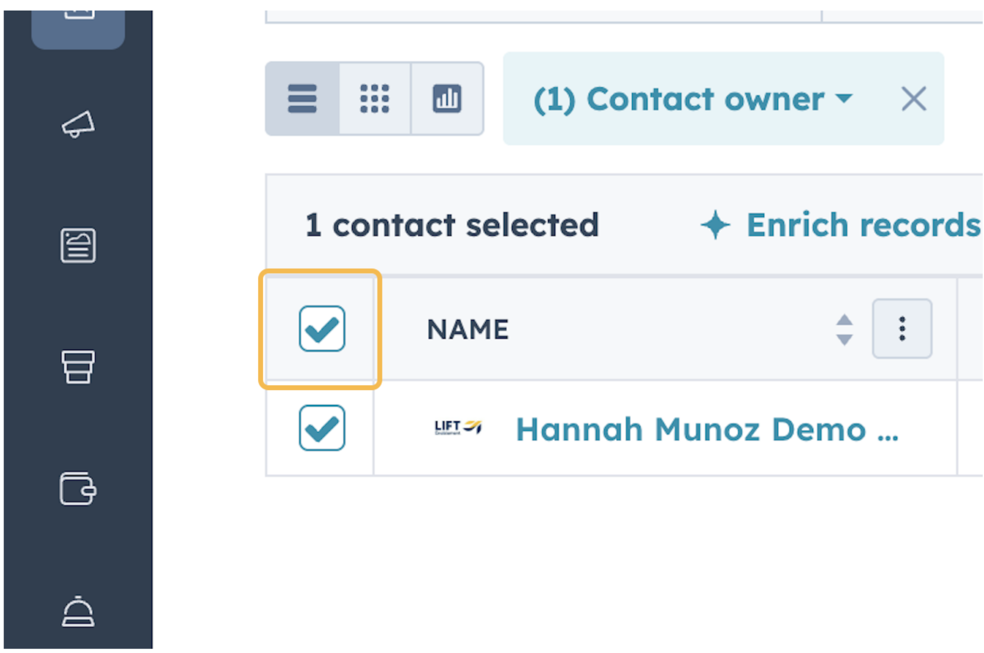
STEP 41

Check the individual Contacts you want to enroll



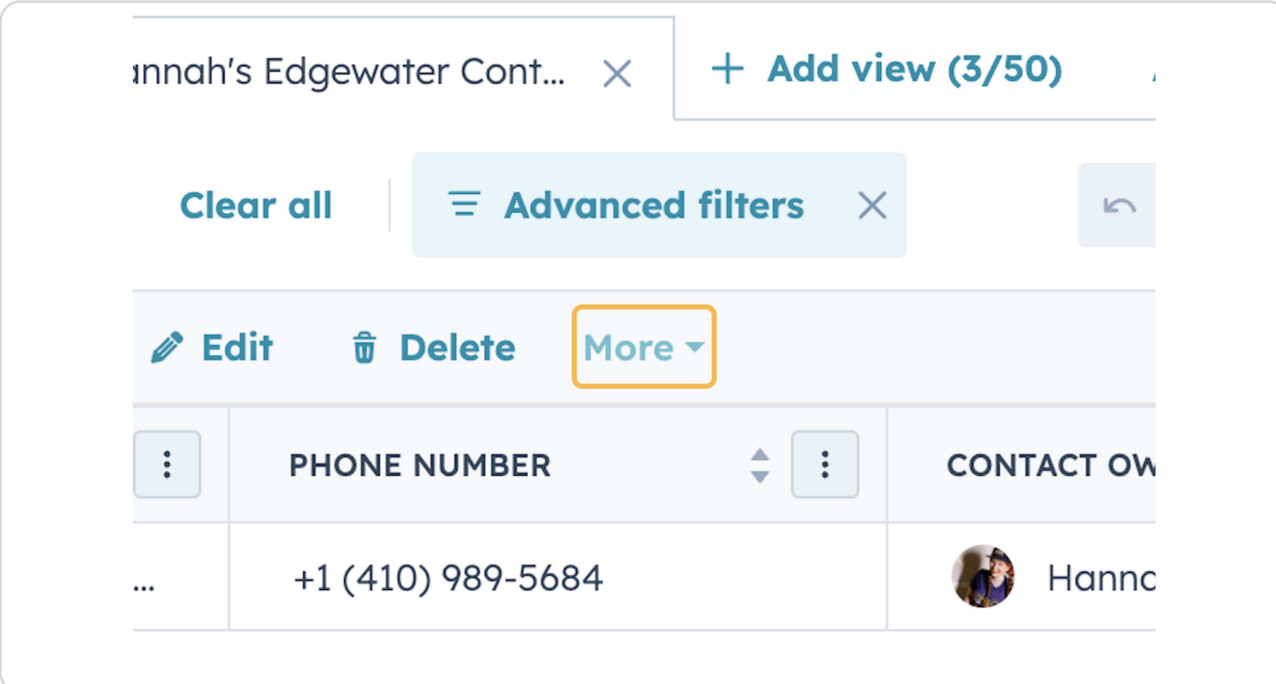
STEP 42

OR Check the box at the top to select everyone in the list to enroll



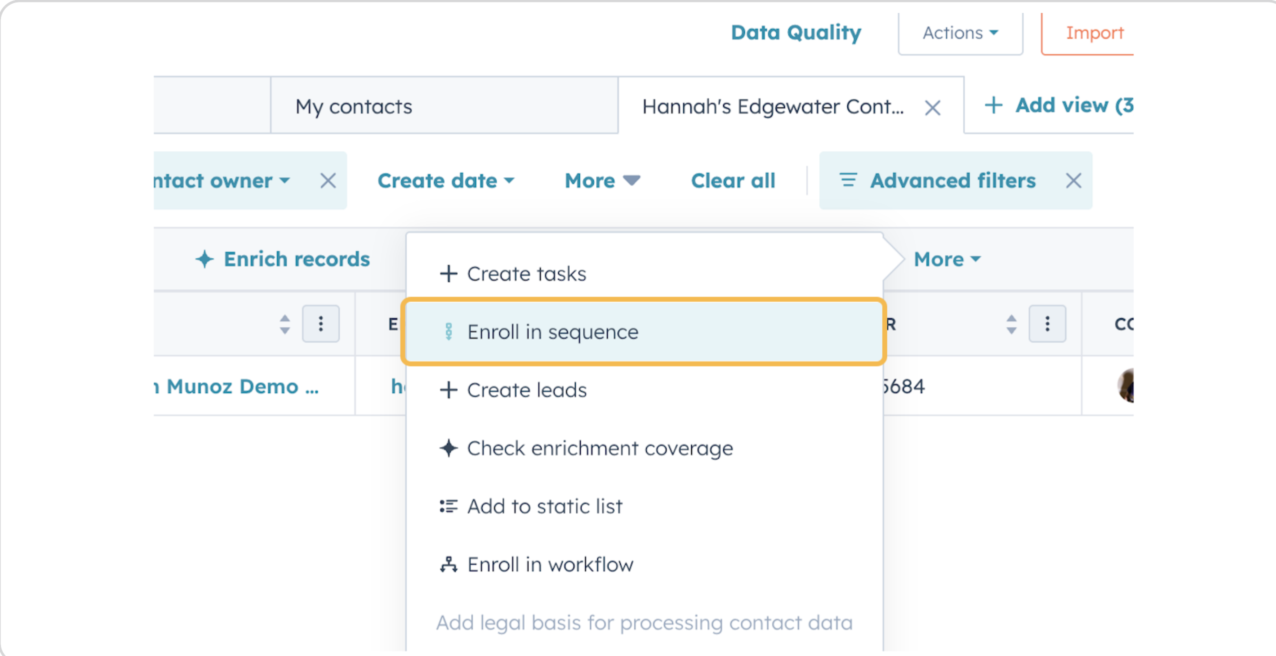
STEP 43

Depending on your screen size, you'll see Enroll in Sequence at the top of the spreadsheet. If not, Click on More



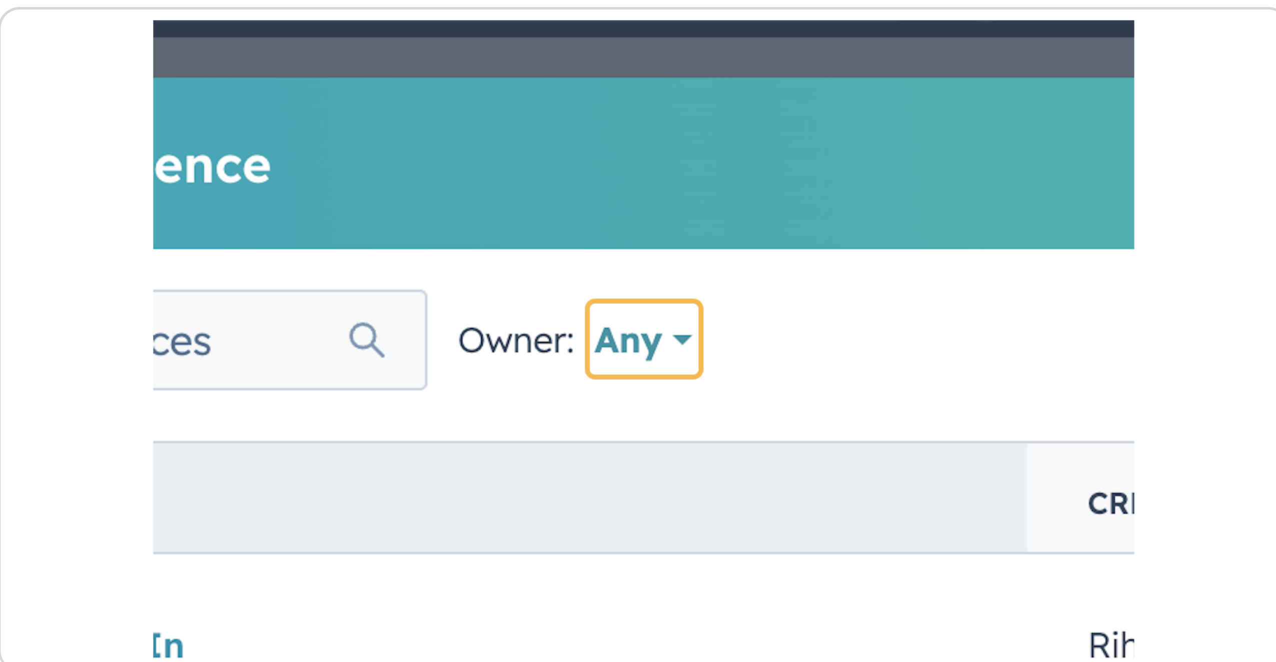
STEP 44

Click on Enroll in sequence



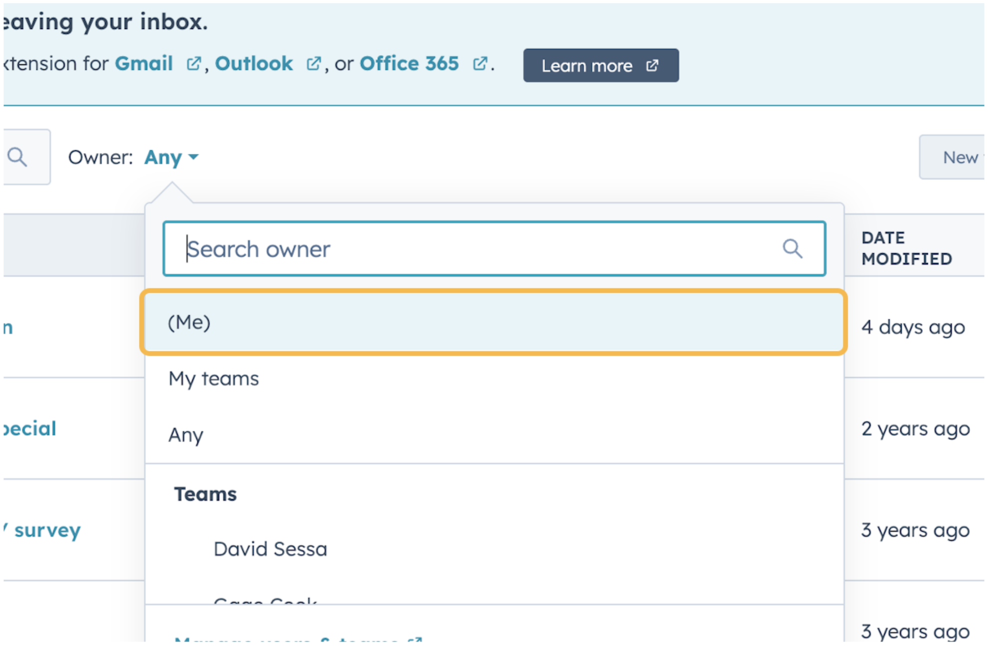
STEP 45

Click on the Owner dropdown



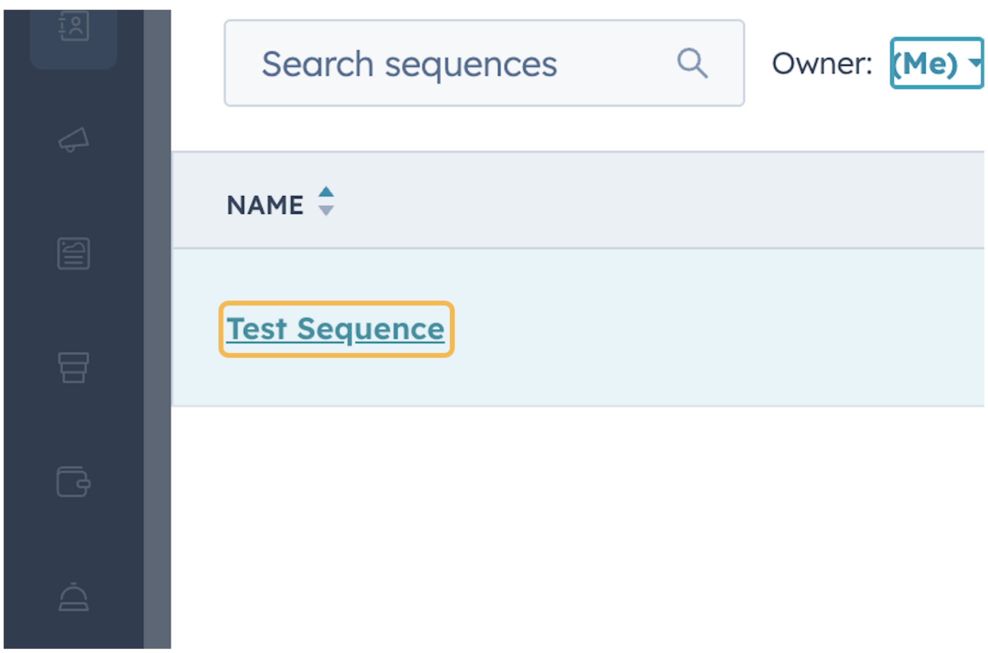
STEP 46

Click on (Me)



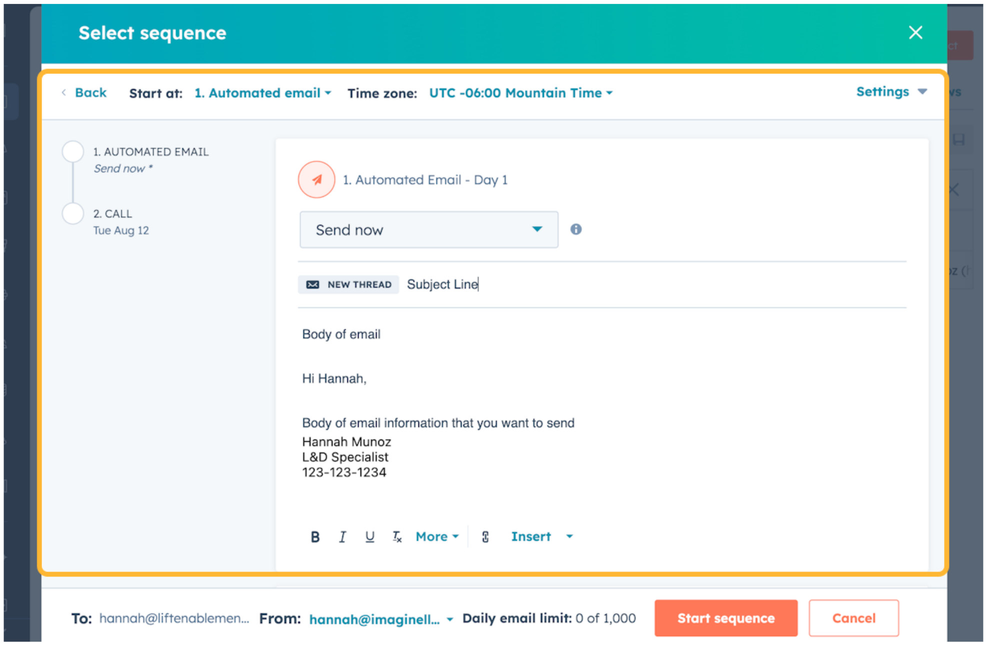
STEP 47

Click on the Sequence you want to enroll the Contacts into



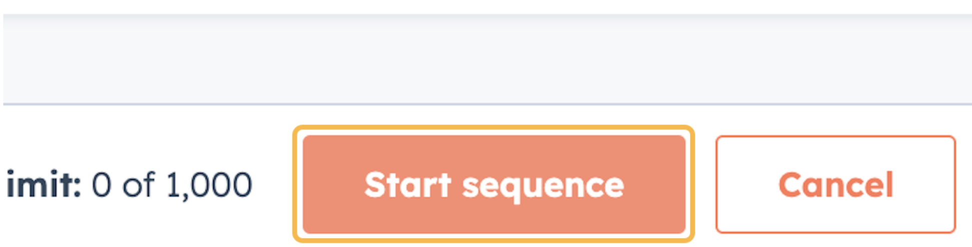
STEP 48

Make any tweaks to your Sequence



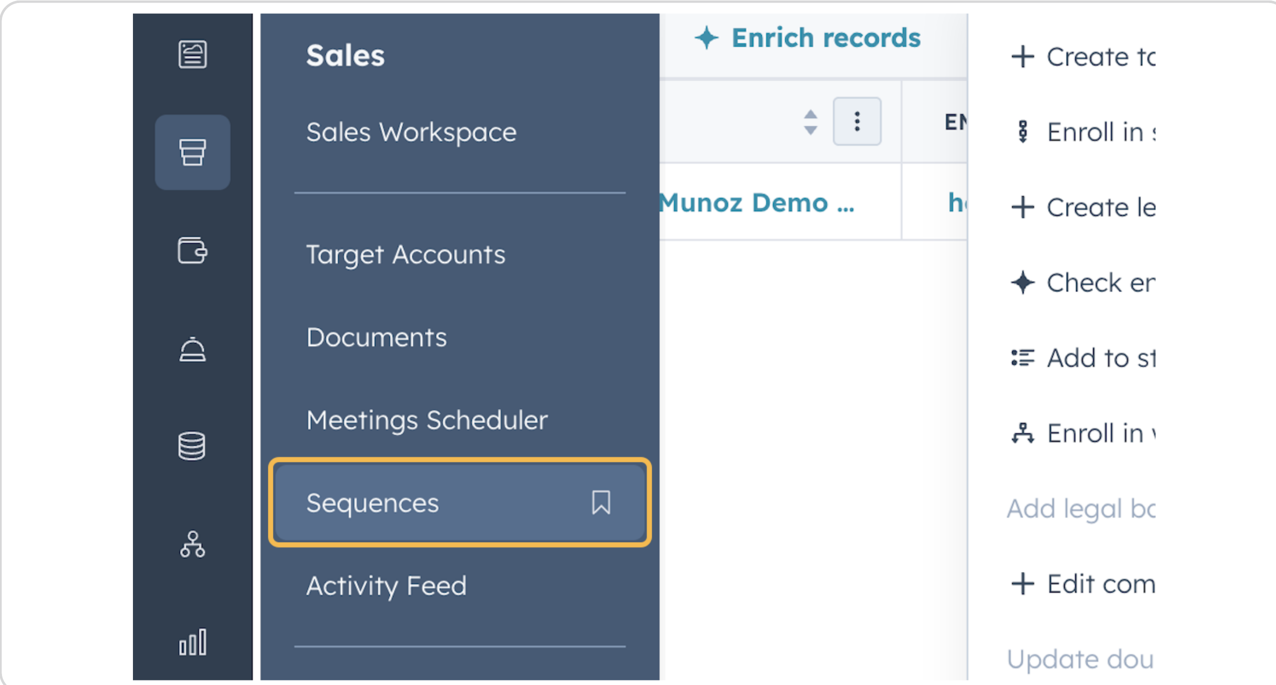
STEP 49

Click on Start sequence



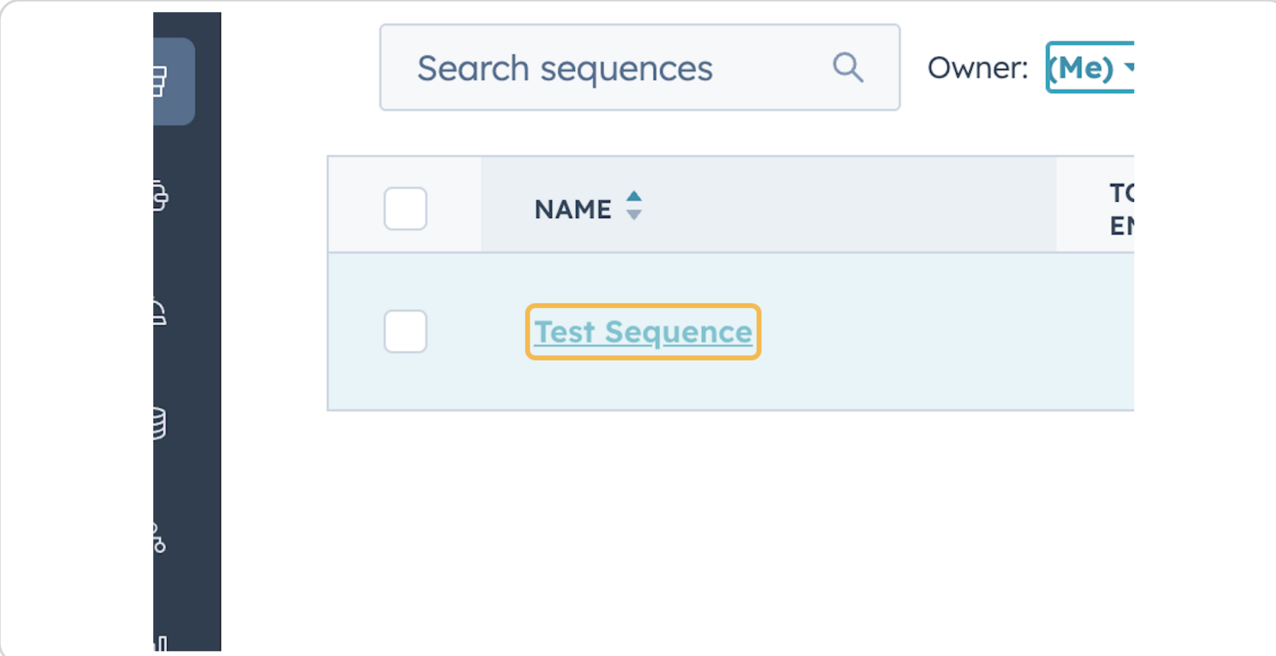
STEP 50

Navigate back to Sequences. Go to the Sales section of the Navigation and Click on Sequences



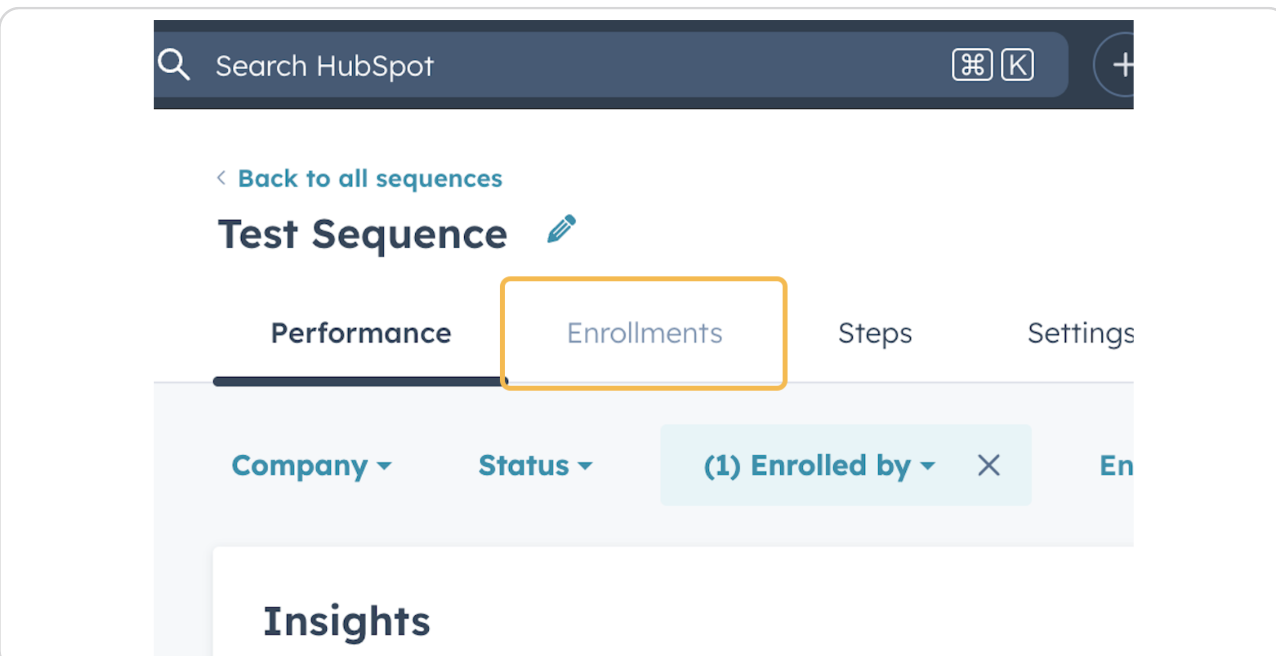
STEP 51

Search for and Click on the Sequence



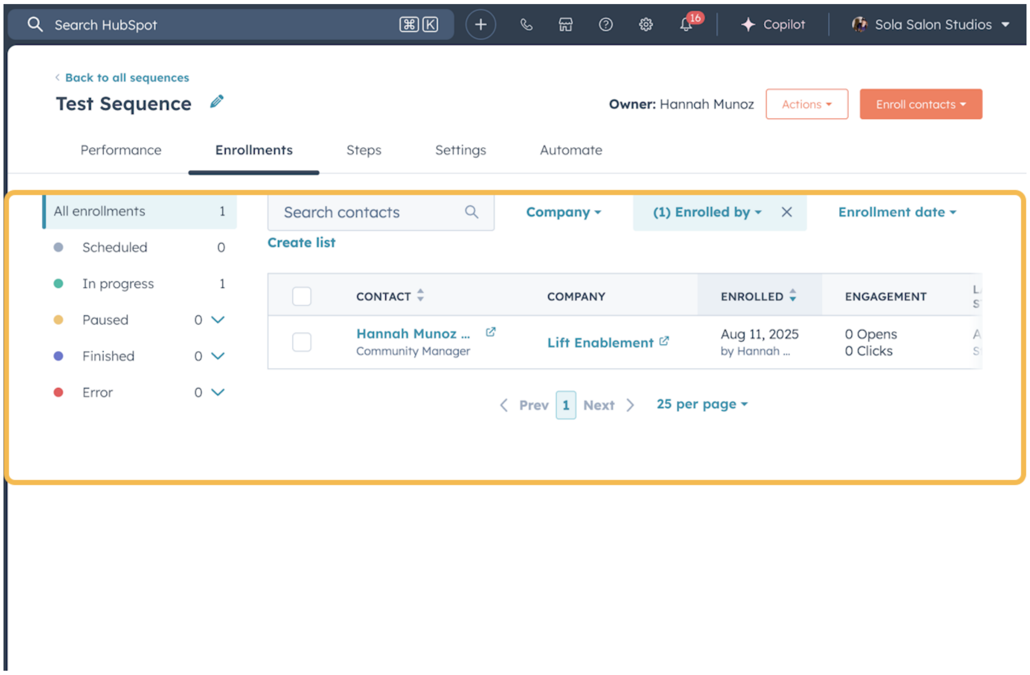
STEP 52

Click on Enrollments



STEP 53

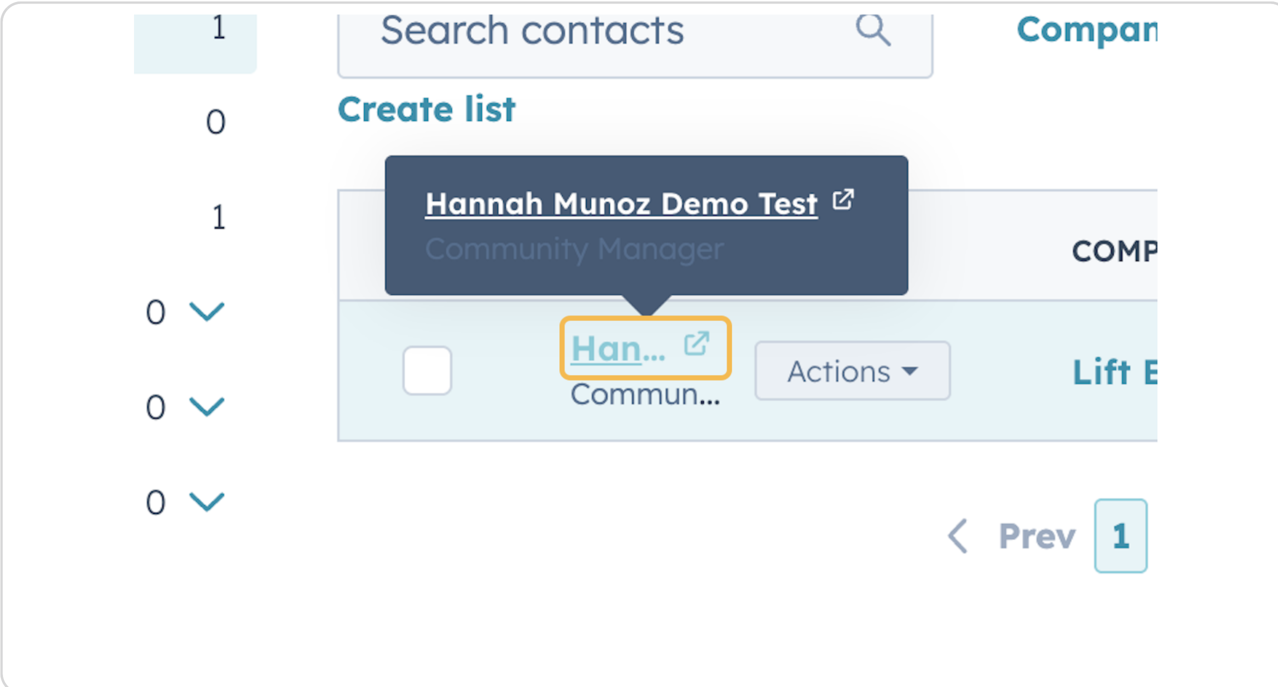
Here you'll see the enrolled Contacts and insights into where they are at and how they are performing in the Sequence



LIFT Enablement

STEP 54

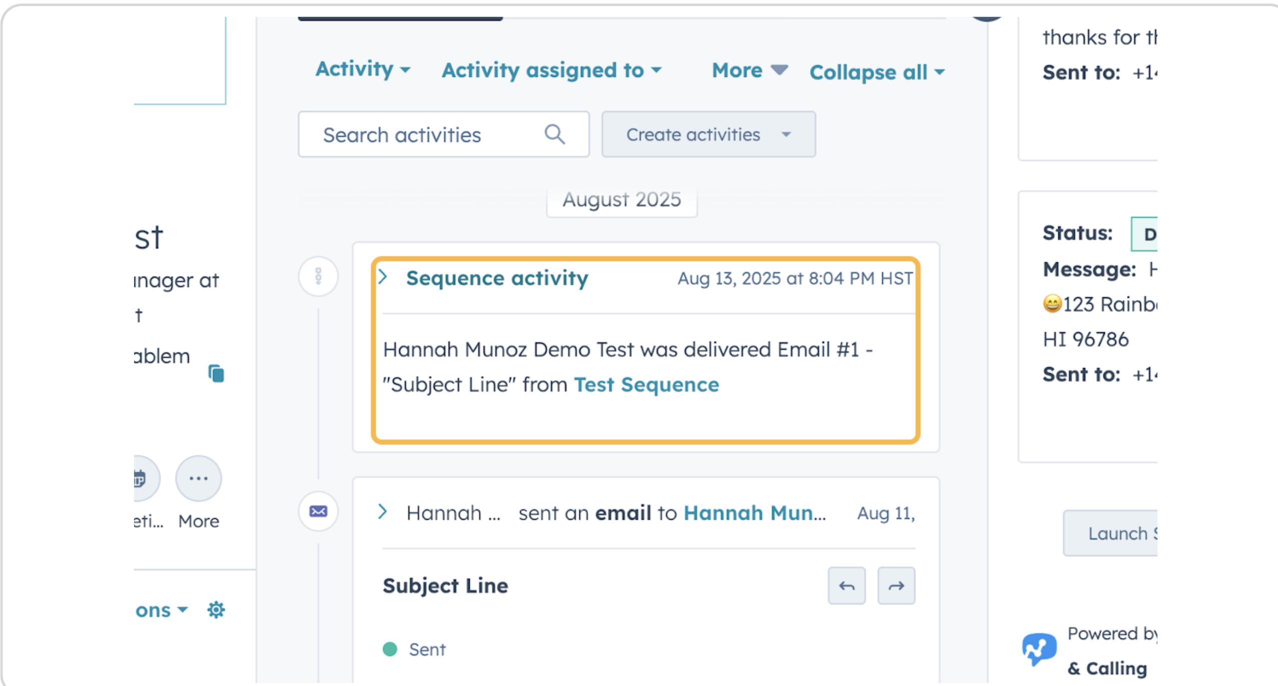
Click on the name of the Contact



STEP 55

In the Contact record on the Activity timeline, you'll be able to see more details on the Sequence activity

The details here will show you what has been completed in the sequence and when the next action is.Note: If you have tasks in your sequence, they will populate in your Task Management tool where you can segment them into a Queue.

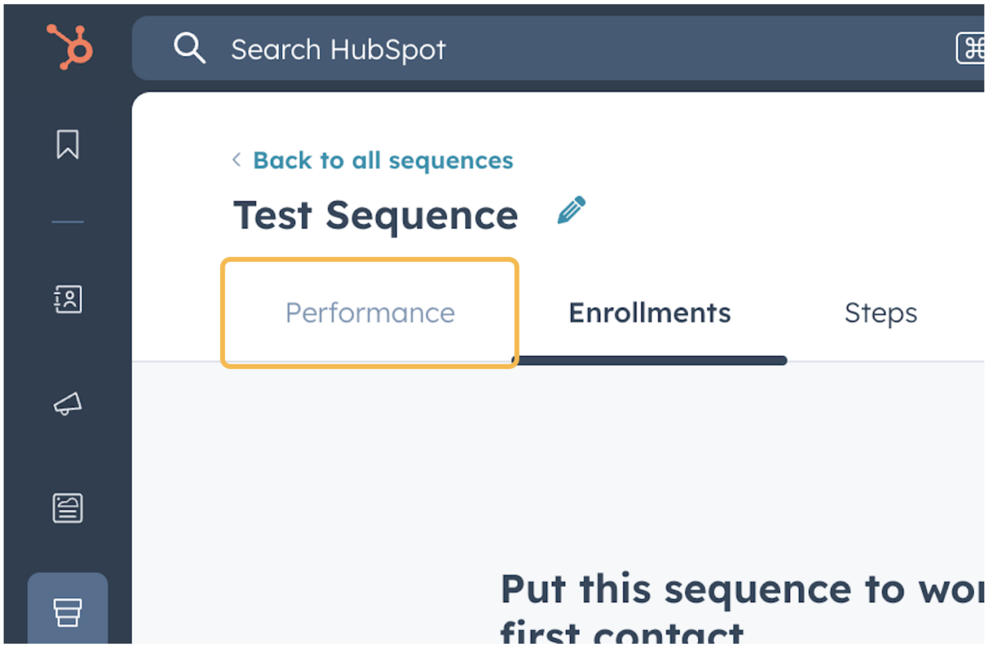


Other Tabs in a Sequence

8 Steps

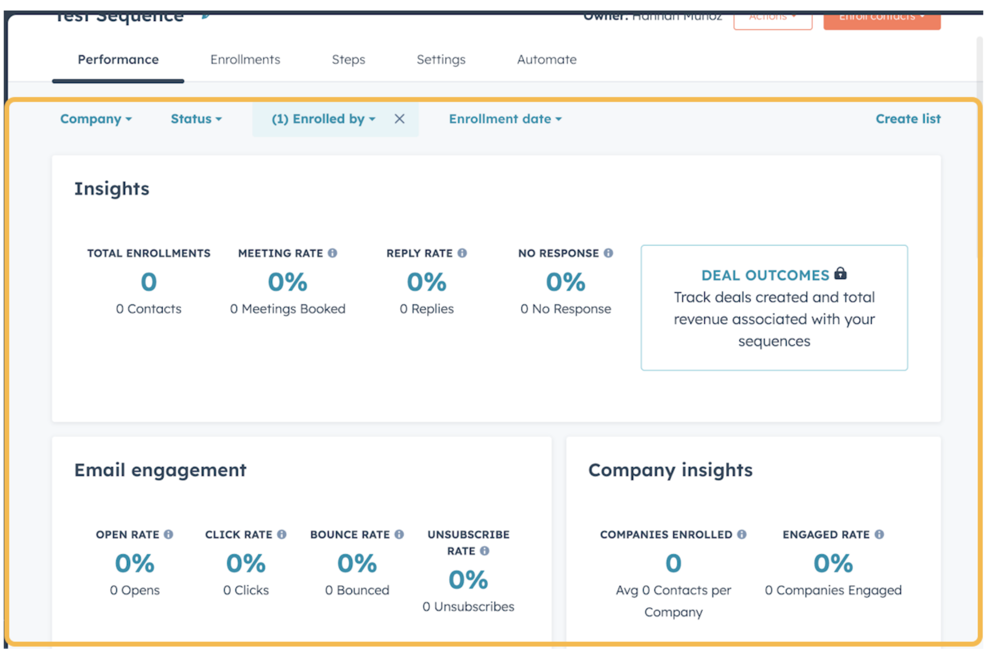
STEP 56

Click on Performance



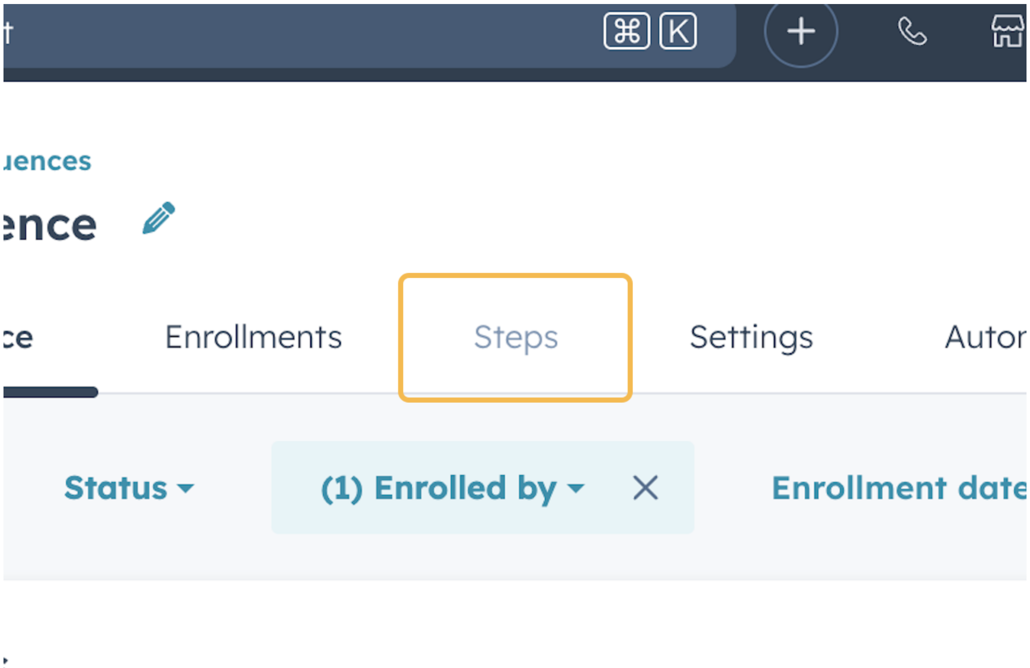
STEP 57

You'll see insights into how your sequence is performing



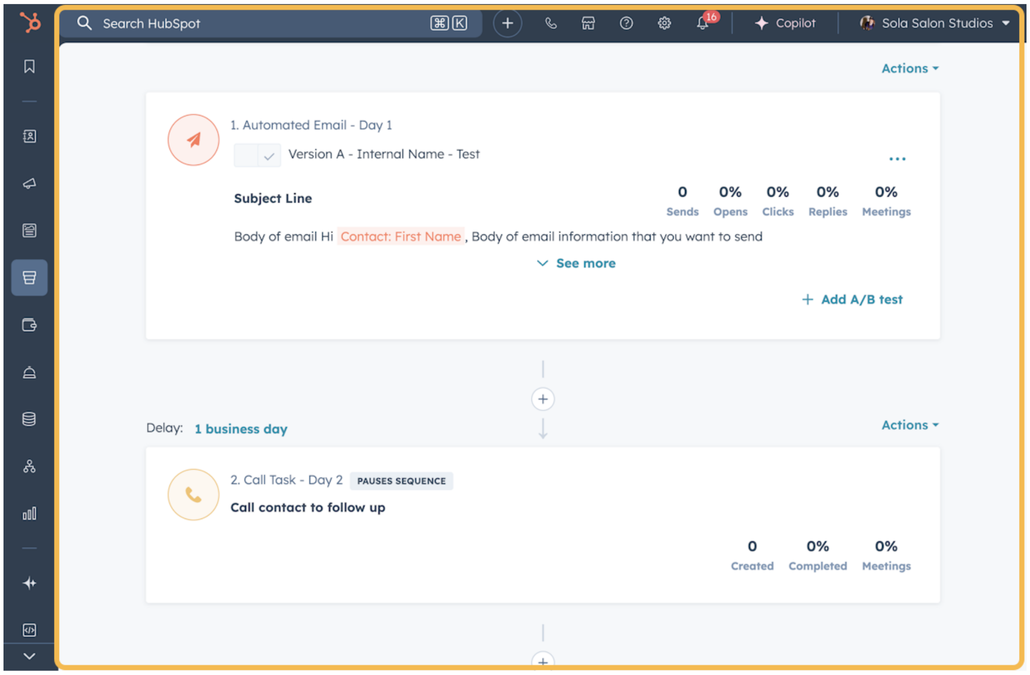
STEP 58

Click on Steps



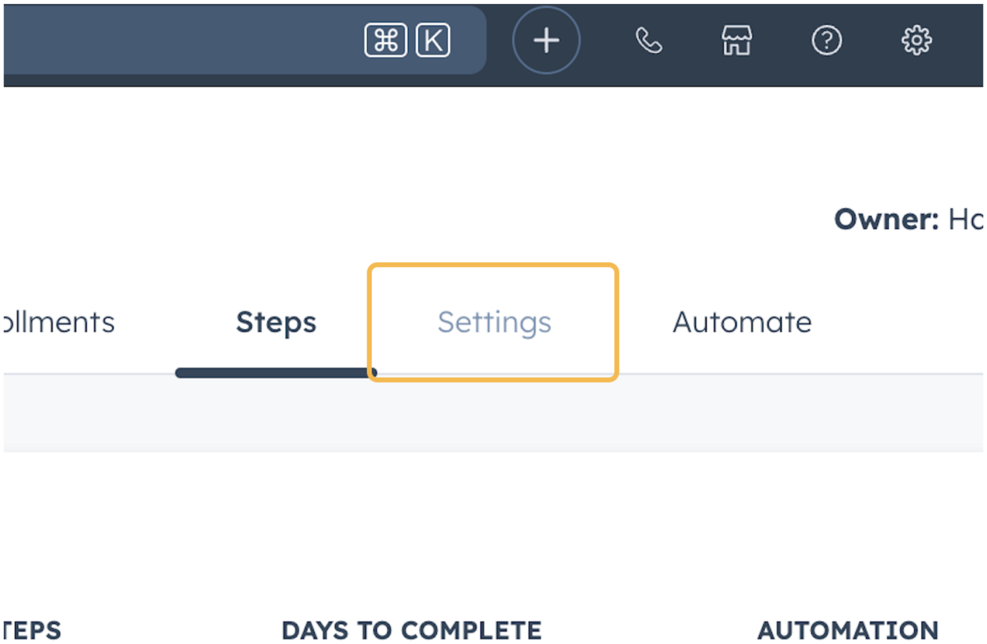
STEP 59

You can update any steps if needed and see stats on how each individual step is performing



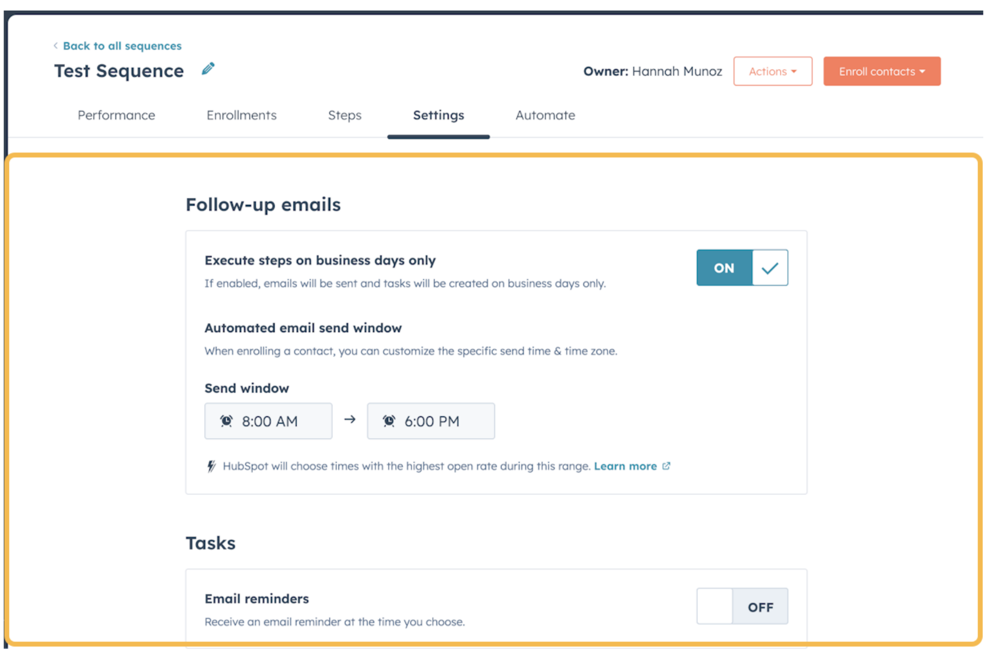
STEP 60

Click on Settings



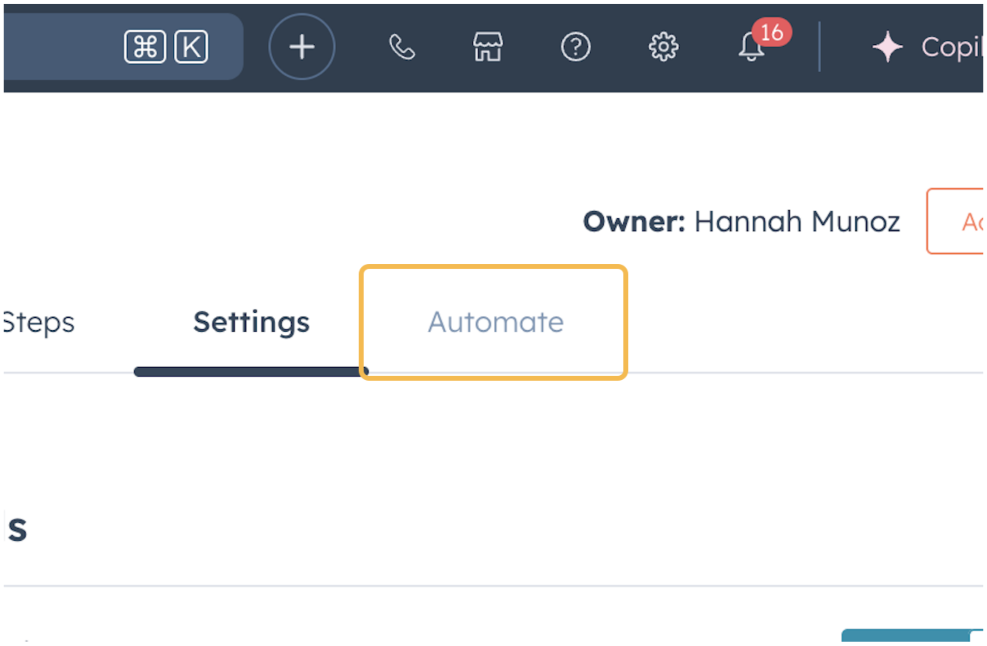
STEP 61

You can update any settings if needed



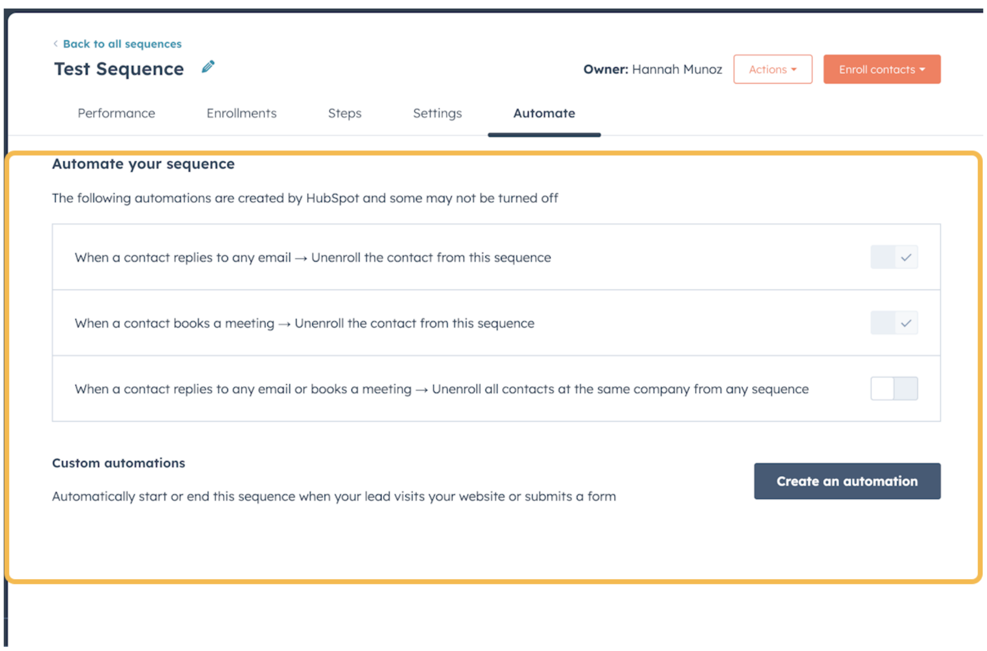
STEP 62

Click on Automate



STEP 63

You can make any adjustments to the automate options for the Sequence



LIFT
Enablement