THE CRM LEVERAGE DESK PLAYBOOK

Your 1-Page Battle Map for Driving Leads Natively to Closed-Won Status

1. THE GOLDEN HANDOFF RULE: HOW TO SHARE THE FIELD WITH THE CHATBOT

The automated chatbot is your scale machine. It works 24/7 in the background—capturing, qualifying, and organizing new incoming prospects so you don't have to spend your days doing manual admin work. However, **the chatbot is designed to only handle the first 80% of the sales sequence.** Your human skill is what must close the final 20% that actually collects the cash. The exact handoff occurs the moment a lead shows clear buying intent, asks a specific question, or asks for a manual checkout/booking link. **You must take manual control.** If you reply to a prospect without disabling the chatbot first, the bot will continue reading their messages and will talk over you, instantly ruining the sales friction and killing the deal.

THE MANUAL OVERRIDE PROTOCOL (DO THIS FIRST)

1. Strip Trigger Tags: Go to the contact profile in the left panel. Click the 'X' to delete the tags that run active chatbot logic (e.g., 'New Lead' or 'Opportunity Created').

2. Inject the Stop Tag: Apply the designated pause tag (e.g., 'Stop Bot' or 'Current Member') to instantly shut down the chatbot's automated triggers.

3. Audit & Correct the Data: Verify the contact's custom fields. Ensure the chatbot captured their correct name, email, and phone number. Fix any typos manually.

4. Close the Opportunity: Open the Clientes Potenciales tab and manually drag their opportunity card to 'Won' or 'Lost' to finalize the cycle and fire native onboarding.

2. DAILY SALES CONSOLE ACTIONS (WHERE THE LEVERAGE IS)

Workspace Tab	Daily Action & Operational Value	Critical Leverage Rules
Scoreboard *(Dashboard)*	Review pipeline values and total open deals. It instantly identifies the exact amount of potential revenue waiting to be closed.	• Open first thing every morning to set daily sales priorities.
Conversations *(Unified Inbox)*	Engage in a single chronological feed per contact (Email, SMS, WhatsApp, Instagram). Use Snippets for quick templated answers.	• **Instagram 7-Day Window:** Reply within 7 days or Meta locks the chat. Override via the native app if locked.
Opportunities *(Pipelines)*	Dragg-and-drop opportunity cards through the stages. Always update the value field to reflect the client's subscription intent.	• Drag cards to the bottom (Won/Lost/Abandoned) to clean the board and trigger automated onboarding.
Contacts *(Database)*	Assign follow-up tasks to yourself/team in the right panel. Keep your brain on autopilot; let the CRM remind you.	• **Compliance Guard:** Never touch DND (Do Not Disturb) checkboxes manually unless specifically requested.

3. UNBREAKABLE RULES FOR AN UNSTOPPABLE SALES PIPELINE

Rule #1: You Cannot Break This CRM. Administrative locks restrict standard agent permissions from touching complex backend automations or deleting contact directories. Explore, click, and work your pipeline with absolute confidence.
Rule #2: Avoid Email Bounces. When sending promotional newsletters, only blast verified email addresses. High bounce rates will blacklist your domain, sending all standard sales follow-up emails straight to your clients' spam folders.
Rule #3: Clean Up Duplicate Profiles. If a prospect reaches out on both WhatsApp and Instagram, unhide your contacts, manually copy missing detail fields into the main record, and delete the secondary profile (confirm deletion by typing 'borrar').

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