



CarrotCRM Boost

Looking for more hands-on help setting up CarrotCRM? CarrotCRM Boost — an enhanced setup service — fully implements your CRM and optimizes your follow-up systems, ensuring you're set up for success.

SERVICE	INCLUDED SETUP <i>Paid plans only</i>	CarrotCRM BOOST <i>Paid add-on</i>
Discovery & Strategy Call	✓	✓
Lead Migration	✓	✓
Integrations Setup	✓	✓
Campaign Setup & Labeling	✓	✓
Training Call	✓	✓
Channel Setup <i>Only available with the Team plan</i>		✓
Campaign Autoresponders Setup <i>Only available with Scale & Team plans</i>		✓
Contract Setup		✓
A2P 10DLC Assistance		✓
Autonomous Lead Manager (ALM) Setup		✓
AI Lead Scoring Configuration		✓
TV Dashboard Configuraiton		✓
Transaction Management Setup		✓
Check-in Call		✓



CarrotCRM SETUP GLOSSARY

Discovery & Strategy Call

Let's connect to learn about your business, lead types, and to align on what you'd like to get out of the CarrotCRM onboarding and setup process.

Lead Migration

We create any custom fields and properties you need to align with your data, clean your data, and import your leads into your new CarrotCRM instance.

Integrations Setup

We connect your website and any other tools you want integrated into your CRM, test that your forms and 3rd party lead sources are flowing into the CRM, and make sure all the tagging works correctly.

Campaign Setup & Labeling

We create campaigns for your lead sources, set up lead routing, and add labels and groups.

Channel Setup - **BOOST ONLY**

Grouping campaigns together for easier management (for example, adding all your PPC or direct mail campaigns into a single channel view).

Campaign Autoresponders Setup - **BOOST ONLY**

For members with Scale or Team subscriptions, we'll help you set up the texts and emails you want to automatically send when a new lead comes in, and verify your messages come from the right number/email.

Contract Setup - **BOOST ONLY**

We gather your logo, contract email address, contract PDF template, and a completed contract for reference, then build the contract in your CRM with the correct fields. We also make sure contracts send correctly when scheduled via an action.

A2P 10DLC Assistance - **BOOST ONLY**

We'll help you complete and submit your A2P 10DLC registration accurately. Please note that Carrot does not manage or monitor the approval process — updates and follow-up are handled directly by the carrier. Carrot does not guarantee A2P 10DLC approval.

Autonomous Lead Manager (ALM) Setup - *BOOST ONLY*

We'll create your desired ALM agents, modify the prompt instructions, and show you exactly how it works.

AI Lead Scoring Configuration - *BOOST ONLY*

We'll customize the AI Lead Scoring to your priorities and criteria, making sure leads are scored how *you* want them.

TV Dashboard Setup - *BOOST ONLY*

For users with CarrotCRM Team, we'll turn on your TV dashboard, add users, set goals, and make sure the dashboard displays the metrics you care about.

Transaction Management Setup - *BOOST ONLY*

For Scale and Team users, we'll customize the wholesale transaction template with your statuses, fields, and calculations, etc. We also create your transaction checklist automation.

Check-in Call - *BOOST ONLY*

After everything is set up, you've received your training, and have been using your CRM for a while, we have a check-in call to see how everything is going, help you further optimize sequences, and explore features you need more help with.

CarrotCRM TRAINING CALL

Before handing off your CRM, we make sure you're trained on using it successfully. CarrotCRM training covers how to:

- **Complete your profile** - Name, role, contact information, etc.
- **Set up notifications** - Identifying which notifications you want enabled and making sure you receive text notifications
- **Handle leads** - Navigating opportunity details, adding/updating actions & next steps, sending emails/texts directly from CarrotCRM
- **Create personalized automations** - Creating and adding leads to automated sequences. For Scale and Team users, we'll also review campaign autoresponders.
- **Add team members and set user access permissions**
- **Access CarrotCRM AI features**
- **Contact CarrotCRM support**

