**Email sequence to free licence holders at adviser firms with 15+ free licences, no pro**

**Company criteria­­:**

* Company has more than 15 registered users
* DO NOT CONTACT field is unknown/false
* Number of premium licences is less than 1 or unknown
* ChargeBee data is unknown (i.e. no company admin)

**Contact criteria:**

* “verified activity within x date range” (field from Rob/sys admin) is TRUE
* ChargeBee subscription status is UNKNOWN (i.e. not had subscription)
* Mailock licence is FREE
* Hasn’t unsubscribed from sales emails or all emails
* Hasn’t been enrolled in email sequence before
* Email domain is not a personal one

\*Once enrolled, contacts receive the first email (or Carole receives the task to send the first email) in a staggered fashion, in alphabetical order with delays between microsegments of contacts with first names starting with each letter (As, 20 mins, Bs, 1 day, Cs, 20 mins, Ds, 1 Day….).

Graphical user interface, text, application, email

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**Email sequence to free licence holders at adviser firms with 15+ free licences + 1-4 Pro**

**Company criteria­­:**

* Company has more than 15 registered users
* DO NOT CONTACT field is unknown/false
* Number of premium licences is 1-4
* ChargeBee data is known (i.e. company admin known)

**Contact criteria:**

* “verified activity within x date range” (field from Rob/sys admin) is TRUE
* ChargeBee subscription status is ACTIVE (i.e. not cancelled)
* Mailock licence is PREMIUM
* Hasn’t unsubscribed from sales emails or all emails
* Hasn’t been enrolled in email sequence before
* Email domain is not a personal one

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