### Target Potential Buyers
First Meeting Video Follow-up Use Case Example

#### Ideal Customer Profiles
- **UNKNOWN**
- **KNOWN**
- **RETURNING**
- **TARGET ACCOUNT**
- **SALES ENGAGED**
- **CUSTOMER**

#### Channels
- Direct Traffic
- Referral Traffic
- Content Syndication
- Paid Search/Social
- Display Advertising
- Email Marketing
- Organic Search/Social

#### Offers
- Webinar
- Virtual Event
- Content
- Demo Video
- Newsletter
- Calculator
- Assessment

#### Website Experience
- **URL**
  - Drift.com/case-studies
- **UTM**
  - N/A

#### Campaign
- **CAMPAIGN NAME**
  - Meeting_Followup

#### Engage Options
- Regular Playbook
- Triggered Playbook
- Embedded Playbook
- Conversational Content
- Live Chat
- Email
- Video

#### Engage Hook
- **ENGAGE HOOK**
  - 100 characters or less
  - Wanted to make sure you have a few takeaways from our conversation today

#### Engage Response
- I'd like to chat with someone
- I'd like to learn more about your solutions
- I'm just browsing
- I'm looking for Customer support

#### Primary Call-To-Action
- **ROUTE TO SALES**
- **DROP A CALENDAR**

#### Secondary Call-To-Action
- Marketing Offer
- Self-Service Resource
- Route to Customer Support

#### Business Outcome
- Meeting Booked
- Opportunity Created
- Sales Activity

#### Buyer Outcome
- Chat Now
- Chat to Call
- Zoom Meeting
- Book a Meeting
- Education
- Demo Video
- File Support Ticket
- Chat with Support
How to Use Video to Engage, Understand, and Recommend

**ENGAGE: ASK & ACKNOWLEDGE**

*Timeframe:* within 24 hours of first meeting  
*Video to Record:* Face & Screen  
*Title:* [Your Company] Call Recap [Date]  
*Video Script:*

Hey {{first name}} and {{Their Company}} team 🤝

Really enjoyed our conversation today and wanted to make sure you have a few key takeaways from today’s conversation.

State 2–4 key highlights of what was accomplished during the call/how you can help

**UNDERSTAND: LEARN & RESPOND**

Is there anything I’m missing?

**RECOMMEND: GUIDE & SUGGEST**

Please share your feedback on this video using the chat, **cue pointing your right hand to the left** Or let’s use the bot to book a time to confirm [insert next steps] next week!

Thanks for watching! Take care!