Simple vs. Advanced Sequencing

Sequencing · https://learnpcr.pcrecruiter.net/site/docs/sequencing/simple-vs-advanced-sequencing/

Sequencing Types

Simple Sequencing and Advanced Sequencing are both powerful tools with many of the same features and functions. While choosing which feature to use relies heavily on the individual preference of the user, there are a few cases where one is a better option than another. Below are the recommended use cases of the two types based on potential scenarios you may encounter in your day to day workflow.

Simple Sequencing Use Recommendations

- Easier and quicker to utilize, this is better for users who do not have a complicated process when they are interacting with candidates. For users who preferred using Rollup Stages over Advanced Sequencing, this is the right feature for them.
- Ability to manually skip over future or jump back to previous steps, better for users who want to have more manual control over each name record in the Sequence. If someone does not have a defined process they adhere to this is a better option since they can simply have the name record skip steps that are not relevant or have them redo the same steps so that name records can follow different paths within the same Simple Sequence.
- The ability to create a Sequence on the fly. Some users don’t like having to create a template each time you go to activate a Sequence, this cuts down the time it takes to get a Sequence up and running.
- Manual Link to Pipeline step. For users who would like to determine which Pipeline the user is linked to, which also can be multiple Pipelines at once. For users who will have 1 Sequence for a number of different jobs.
- Ability to have a custom activity type write after completing a specific step. This is helpful for analytics tracking purposes because the user can break down the exact step for each Sequence,

for example having a marketing Sequence with unique tasks for each automatic email (MKT 1, MKT 2, etc.).

Advanced Sequencing Use Recommendations

- Ability to create complicated workflows. Users who want the ability to have name records routed to a number of different locations based off of specific conditions/triggers.
- Ability to have conditions based on automatic email/SMS interactions from the recipient. Better for users who like the ability to determine the outcome of the next task based on how the recipient interacted with the email steps. This is good for marketing campaigns or candidate outreach to assist with prioritizing tasks based off of which candidate has replied to, opened, or unsubscribed from automatic emails/SMS.
- Ability to add instructions and a script to a step. For offices that have an admin who assigns out Sequences to users and want more detailed instructions to be followed by the user without the need for a defined process.
- Ability to jump to branch to restart a branch from step one. For Rolling Sequences that the user wants the name records to be able to remain in for an indefinite amount of time. This gives the user a cyclical Sequence that can have name records remain in the process for a long time. This is good for lists that are used for ongoing outreach or marketing campaigns.

FAQs for Sequencing differences

1. What Type of Sequencing should I use?
    - In general Simple Sequencing is for straightforward processes that follow a certain flow. This option is better for those who would like a more manual tool. Advanced Sequencing is more intricate and takes into account more scenarios during your workflow. This option is better for those who would like a more automation based tool. See above for detailed examples for each type of Sequencing Feature.

2. I'm not comfortable with heavy automations, I prefer to handle each contact or client individually.
    - Try out Simple Sequencing. This version is better for users who like a more hands-on approach to their contacts and clients.

3. I would like my process to be more automated, I am very busy and looking to maximize the amount of time I can spend working directly with clients.

- Try out Advanced Sequencing. This version has a number of automated features and is better for users who want a more hands-off process.

4. I would like for my Email/SMS communication to trigger specific automations for things like Replies, Links Clicked, or Opt-outs.
   - Try out Advanced Sequencing. This version has the ability to set triggers based off of automated Emails being replied to, links being clicked, opted-out contact information, and time related conditions.

5. I've tried Advanced Sequencing but it seems to be too complicated for me.
   - Try out Simple Sequencing. This version is a simplified version of the Sequencing feature and is better for users who do not need an intricate process.

6. I've tried Simple Sequencing but it seems to be too limited for me.
   - Try out Advanced Sequencing. This version has a number of different additional features and is better for users who want a more automated process.

7. What if I don't know which Type I should use?
   - Your trainer can help to guide you on which version of Sequencing will be best for you. We also have demo videos for both Simple and Advanced Sequencing. If you have questions please reach out to support for assistance.