



TRAINING OVERVIEW

Foundation

Setup, Configuration & System Overview



Set Up the System Properly and Understand How Everything Connects

NsiteTechnologyStudios.com/Clientforce-AI



Welcome to the Mentorship Series

Built to take you from confusion to clarity — week by week.



Founder-led training

Direct guidance from the team that built ClientForce.



Structured curriculum

A clear weekly path — no jumping around features.



Clarity → Execution → Results

We focus on what moves the needle, in that order.



Use ClientForce properly

Stop guessing. Build a system that actually runs.



Today is About Getting the Foundation Right

Before features, before campaigns — set the stage.



Reset the stage

Approach the platform the right way from day one.



Remove confusion

Cut through feature overload before it starts.



Show the connections

See how every part of the system feeds the next.



Clear starting path

Walk away knowing exactly what to do first.



Why Most People Struggle (And How We Fix It)

MOST USERS:

- ✗ Jump into features randomly
- ✗ Don't understand the system flow
- ✗ Set things up incorrectly
- ✗ Get stuck and lose momentum



Today fixes that.

You'll leave this session with a clear setup path, a defined first goal, and the confidence to start using ClientForce as a real system — not a pile of features.



The Real Goal of ClientForce

N O T

“Learn features”

Memorising every button doesn't grow a business.



B U I L D

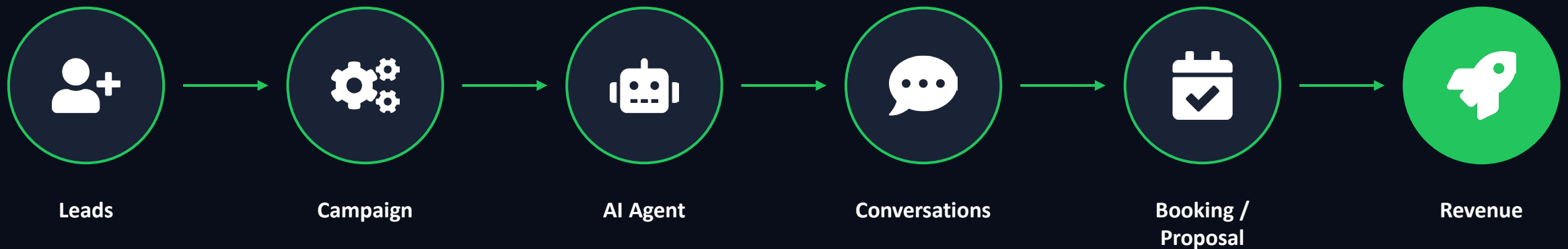
A system that generates:

- Leads
- Conversations
- Booked Calls
- Revenue Opportunities



The ClientForce System (Big Picture)

Everything in the platform connects to this single flow.



Lead → Campaign → Agent → Conversation → Booking → Outcome



The 4 Core Parts of ClientForce

Every campaign you build is made of these four ingredients.

0 1



Lead Input

Where prospects come from.

0 2



Campaigns

The engine that drives everything.

0 3



AI Agents

The brain making decisions.

0 4



Channels

How you actually communicate.



What You Should Focus On First

The single biggest predictor of success: starting small.

D O N ' T

- ❌ Try to do everything at once
- ❌ Test every feature on day one
- ❌ Run multiple campaigns blindly

S T A R T W I T H

- ✅ **ONE goal**
Define what success looks like.
- ✅ **ONE use case**
Pick a single, specific scenario.
- ✅ **ONE campaign**
Build it, run it, learn from it.



Step-by-Step Setup Path

Follow this order. Don't skip ahead.

STEP
01

Account setup

STEP
02

Business
configuration

STEP
03

Channels connection

STEP
04

Agent setup

STEP
05

Campaign creation

STEP
06

Lead input

01

PART ONE

Setup





Account Setup (Do This Properly First)

Five small things that prevent big problems later.



Business name

Use the name your customers know.



Workspace setup

Structure your workspace before inviting anyone.



Basic profile

Logo, contact info, signature defaults.



Timezone & region

Critical for sending windows and call times.



Initial preferences

Notification settings and account behavior.



Before You Set Anything — Decide This

Two questions that determine everything that follows.

QUESTION 01

What are you using ClientForce for?

- Your own business
- Client services
- Both

QUESTION 02

What outcome do you want?

- Leads
- Follow-up
- Booked calls
- Sales



Mistake to Avoid

Most setup failures come from skipping this thinking.

A V O I D

-  Setting up randomly
-  No clear use case
-  Trying everything at once

I N S T E A D



Start with one clear direction

One goal. One outcome. One path forward.

02

PART TWO

Configuration





What Configuration Actually Means

DEFINITION

Configuration = preparing the system to work properly.



Channels

Where messages go in and out.



Business logic

Rules that match how you operate.



Communication flow

The order of touches and follow-ups.



Campaign readiness

Everything connected and ready to fire.



Channels = How You Reach People

Four ways your AI Agent reaches prospects.



Email

The workhorse channel.



SMS

Direct, immediate, personal.



Calls / AI Voice

Real conversations, on autopilot.



WhatsApp

Where your prospects already live.

Next session: we'll go deep on each one.



Without Channels → No Output

No channel



no messages

No messages



no conversations

No conversations



no results

This is why channel setup comes before everything else.



AI Agent = The Brain of Your System

Without an agent, you have automation. With one, you have a system.



Your Agent

Trained on your business. Always on.



Understands your business

Knows what you sell and how you sell it.



Talks to prospects

Real conversations across channels.



Guides conversations

Moves leads toward your defined outcome.



Drives action

Bookings, replies, proposals — automatically.



Big Mistake to Avoid

A poorly configured agent is worse than no agent.

WRONG

-  **Generic agent**
Says nothing memorable to anyone.
-  **No clear instruction**
Drifts, hallucinates, wastes leads.
-  **No defined outcome**
Conversations go nowhere.

RIGHT



Train your agent for a specific goal.

One agent, one outcome — built right.

03

PART THREE

Platform Overview





Key Features You Need to Understand

Eight tools. One system. Each with a clear job.



Campaigns



Lead Finder



Forms



Widget



Chrome
Extension



Inbox



Proposals



Bookings



Campaigns = Where Everything Happens

If ClientForce is a car, campaigns are the engine.



Run the workflow

Orchestrate every step end-to-end.



Send messages

Across email, SMS, voice, WhatsApp.



Trigger actions

Conditional logic on every reply.



Move leads forward

From cold to closed, automatically.



How Leads Enter the System

Five doors into your pipeline — use as many as you can.



01

Manual upload

CSV, list, drop-in.



02

Lead Finder

Built-in prospecting engine.



03

Form submissions

Captures from your funnels.



04

Widget

Embedded on your website.



05

Chrome extension

Capture leads as you browse.



Inbox = Where Conversations Happen

Every reply, across every channel — in one place.



Unified Inbox

All channels. One thread.



Centralized replies

Email, SMS, calls — one screen.



Manage conversations

Sort, filter, assign, respond.



Track engagement

See what's hot and what's stalling.



End Goal of the System

This is what every campaign is driving toward.



Send proposals

Dynamic, branded, in seconds.



Track responses

Know who opened, replied,
ignored.



Book calls

Calendar handoff that just works.



Close opportunities

Move from interest to revenue.

04

PART FOUR

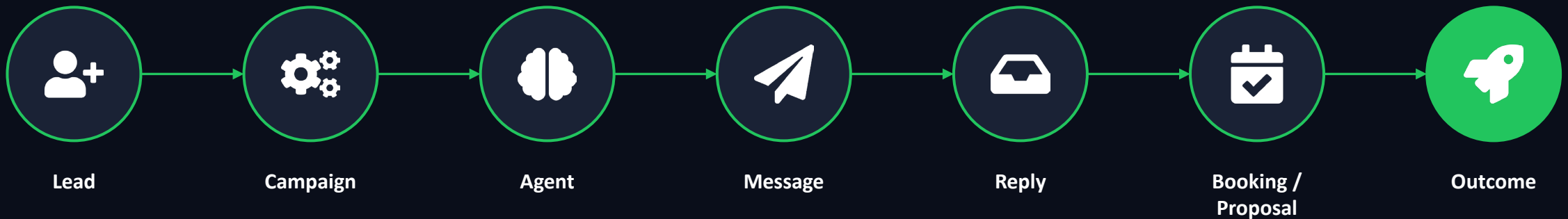
Connecting Everything





The Full Flow

Every part of the platform plays a role in this chain.



Every step feeds the next. Break one, break the chain.



Example: Appointment Setting

A real use case, end to end.



Leads come in

01

Captured from list, form, or finder.



Campaign starts

02

Workflow auto-fires on entry.



Agent engages

03

First touch is sent across channels.



Follow-ups sent

04

Sequenced, conditional, persistent.



Booking link shared

05

When lead shows intent.



Call scheduled

06

Slot held. Reminders set.



What You Should Do After Today

Four concrete actions to lock in this session.

1

Define your first use case

What outcome are you actually after?

2

Complete basic setup

Account, business, profile — done properly.

3

Connect at least one channel

Pick the one that matches your audience.

4

Prepare to build your first campaign

We'll walk through this together.

Next Session: Channels Deep Dive

Where messages actually leave the system. We go in deep.



Email setup

From-address, deliverability,
branding.



SMTP / IMAP

Connect your sender like a pro.



SMS

Numbers, regulations, send windows.



Voice

AI calls that actually sound human.

What This Series Will Do For You

A structured journey from setup to revenue.



Step-by-step learning

No jumping ahead. Each week builds on the last.



Live Q&A

Get unstuck without waiting for support tickets.



Structured growth

Skill stacks build into a working system.



Real execution path

Theory is for slides. Execution is the goal.

You're Now Starting the Right Way

Three things you walk away with today.



You understand the system

How leads, campaigns, agents, and channels fit.



You know the flow

From the first lead to the closed deal.



You have a clear path

Setup steps, first goal, first campaign.

Next step: execution.

NsiteTechnologyStudios.com/Clientforce-AI



ClientForce Is Not Just Software

Used right, it becomes the operating system for how you grow.



Your sales system

A repeatable engine that runs without you.



Your client service engine

Deliver outreach as a service to your clients.



Your agency foundation

Scale without scaling your headcount.