

Elevate Your Lead Outreach with **AI Text**



Scan to register now



Every other Wednesday
11am PT

Today's Agenda

- Introduction
- AI Text Fundamentals
- Your Essential Smart Lists
- Putting It All Together
- Q&A

Introduction

What is AI Text?

AI Text is your smart texting assistant. It handles immediate outreach and ongoing nurturing through smart messaging campaigns. New leads receive instant text follow-up, while your database leads are periodically re-engaged to keep you top of mind.

AI Text is part of **Ylopo AI²**—a bundled automation solution combining that surfaces the best opportunities for you, but AI Text is available as a standalone service.

What AI Won't Do

- ✗ Won't replace agent expertise on local market
- ✗ Won't set appointments
- ✗ Won't contact leads without TCPA compliance
- ✗ Won't override your CRM settings

What Agents Still Must Do

- ✓ Follow up with leads immediately when they're flagged as Priority
- ✓ Work Smart Lists daily
- ✓ Set and manage appointments
- ✓ Connect, nurture, close

AI Configuration in Mission Control

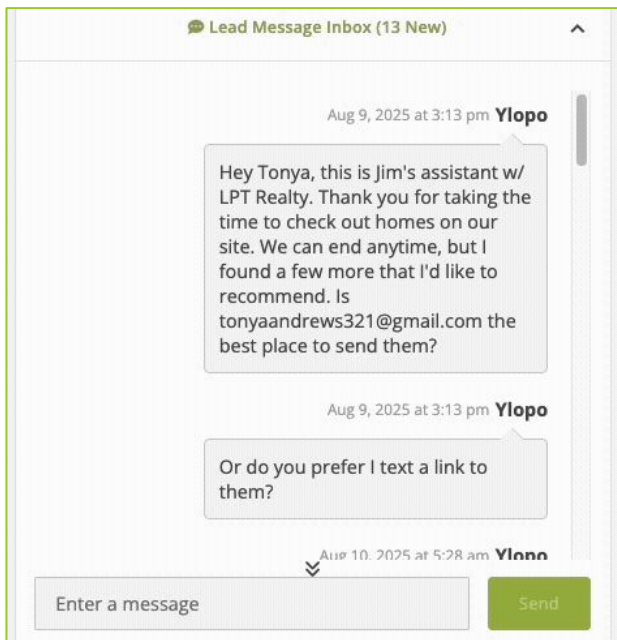
Currently, you have access to the following settings in **Mission Control**:

- ➔ **CRM Stages:** This determines which leads AI can be texted based on their current CRM stage.
- ➔ **Agents:** The agent allow list identifies whose leads can be texted by AI Text.

For all other changes to your configuration, contact support@ylopo.com.

AI Text Fundamentals

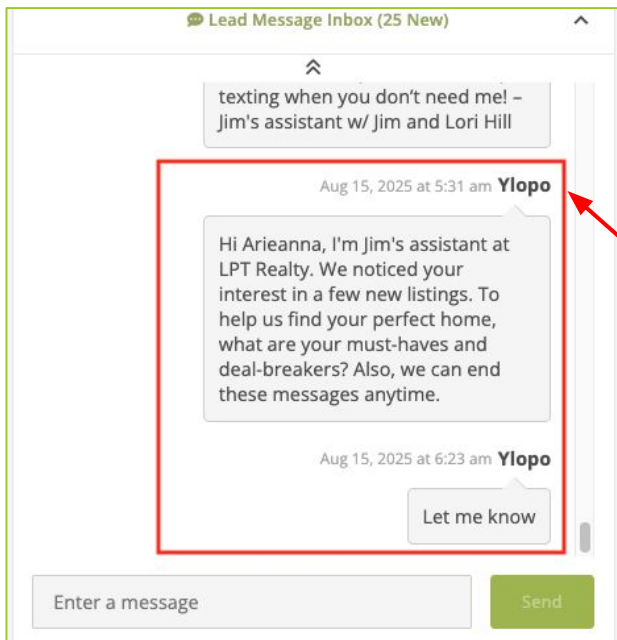
Types of **AI Text**



► Proactive AI Texting

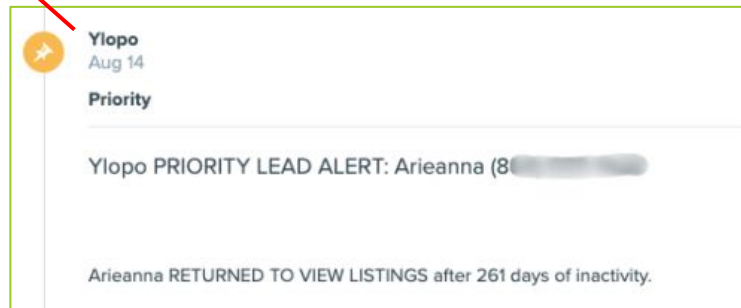
Automatically sends the first text within 5 minutes of lead capture and re-engages cold database leads that haven't shown recent activity.

Types of **AI Text**

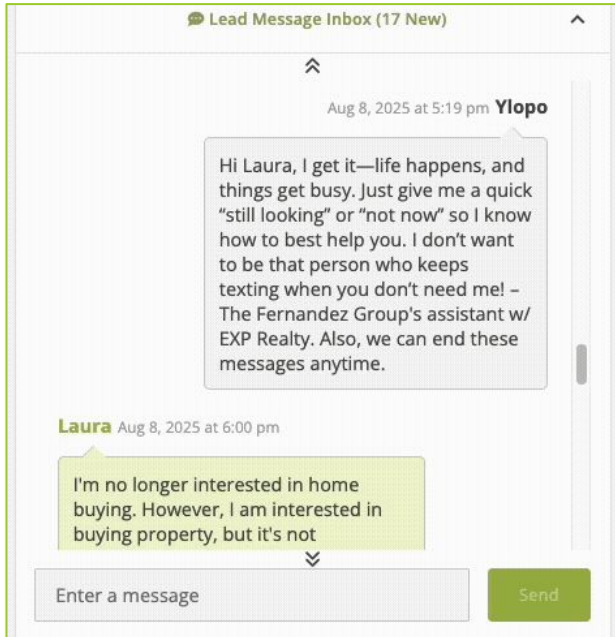


► Behavioral Texting

Triggers relevant texts based on specific website actions like property views, report requests, or extended browsing sessions.



Types of **AI Text**



► **Responsive AI Texting**

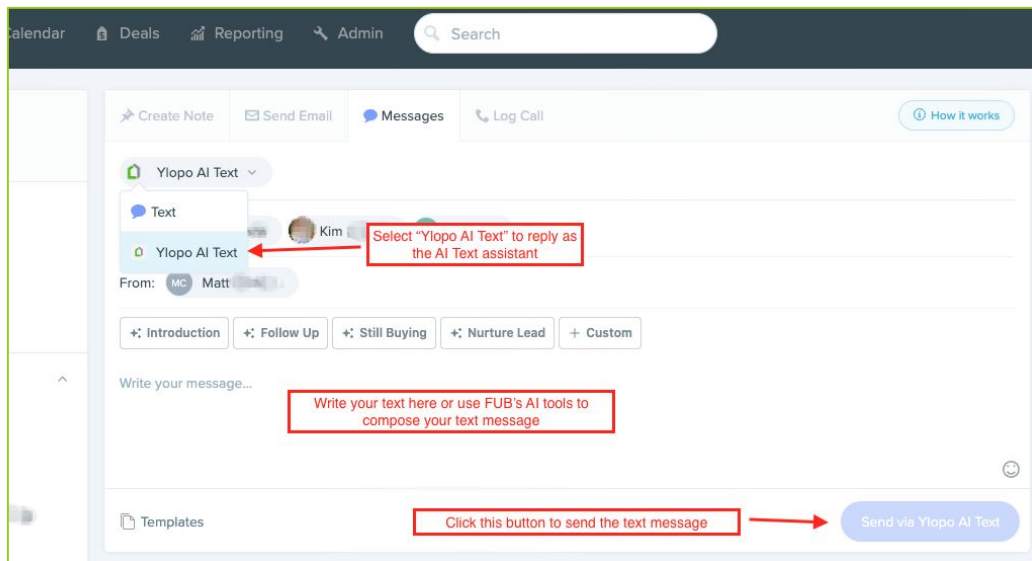
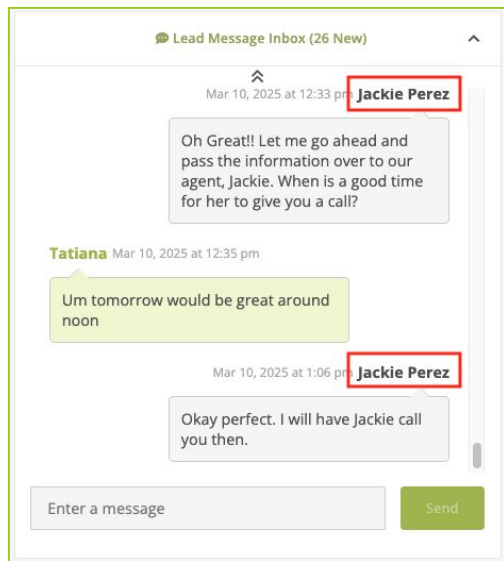
Engages in interactive conversations when leads reply, asking qualifying questions until human expertise is needed and the lead gets tagged for agent follow-up.

AI Text Tags You Need To Know

- ▶ **Y_AI_PRIORITY**: New combined tag for hottest opportunities surfaced by AI Text and AI Voice
- ▶ **AI_NEEDS_FOLLOW_UP**: High intent signals—reach out and take over the conversation immediately
- ▶ **AI_ENGAGED**: The lead is responding to AI Text
- ▶ **AI_NOT_INTERESTED** or **AI_OPT_OUT**: The lead has opted out of messaging or expressed they're not interested. AI Text automatically stops contacting them

Conversation Handoff from **AI Text**

Before taking over an AI Text conversation with a lead, we recommend doing a warm handoff from your AI assistant to you, the agent. You can do the handoff within the Lead Message Inbox or within the **FUB Inbox app**.



When to Take Over **AI Text** Conversations

Tip! Use Smart Lists like "**#3 AI Priority**" or filter for AI_NEEDS_FOLLOW_UP and AI_ENGAGED tags to streamline your workflow and build on the conversation AI Text has already started.

Examples of Takeover Signals:

- Lead asks specific questions about properties
- Requests to speak with someone on the phone or agrees to an appointment
- Shows urgency in their responses
- Asks to tour or view a home

Script Example: *"Hi [Name], I saw you were chatting with my assistant about [specific topic] so I wanted to personally reach out..."*

How to Take Over **AI Text** Conversations

- **Read the full conversation**

Before making any contact, review the text thread to make sure you have the full context and to avoid repeating info already given

- **Acknowledge the conversation with the AI assistant**

"Hey [Name]! My assistant mentioned you're looking to move in the next few months. I'm [Your Name] and I specialize in helping people like you find the perfect home."

- **Continue, don't restart**

Build on what AI Text has already established, for example, instead of: "Are you looking to buy or sell?" Try: *"I noticed you were asking about market conditions for sellers. Are you thinking of listing your current home?"*

- **Set expectations**

Let leads know how and when you'll follow up.
"I'll send you those listings this afternoon and follow up tomorrow to see what you think."

- **Maintain the momentum**

Continue AI Text's speed and responsiveness with quick, proactive personal follow-up to maintain the positive experience.

- **Update your CRM**

Update the lead's stage to reflect your involvement and prevent AI Text from continuing to message them. Add notes about their interests and next steps.

Your Essential Smart Lists

The **Smart Lists** that Matter Most

Here are some of our recommended ones

NEW

New leads, no recent call/text

Add a filter

Last Communication more than...

☐ is not empty

☐ was less than

☒ was more than

12

hours ago

are not empty

☐ include any

☒ exclude any

Import

are empty

Stage includes any of: Lead

☒ include

Lead

☐ exclude any

Created less than 10 days ago

☒ was less than

10

days ago

☐ was more than

Clear filters

IMPORTANT

Handraisers, website/listing alert/seller alert engagement

Add a filter

Last Communication more than...

☐ is not empty

☐ was less than

☒ was more than

1

days ago

are not empty

☒ include any

Y-PRIORITY

HANDRAISER

Y_SELLER_REPORT_ENGAGE D

Y_SELLER_REPORT_VIEWED

CALL_NOW=YES

exclude any

are empty

Stage includes any of: Lead

Clear filters

AI PRIORITY

Leads engaging with AI Text and AI Voice that need your attention

Add a filter

Stage includes any of: Lead

☒ include

Lead

☐ exclude

Last Communication more than...

☐ is not empty

☐ was less than

☒ was more than

1

days ago

are empty

Last Marketing Message Reply ...

☒ is not empty

☐ was less than

☐ was more than

☐ is empty

Tags include any of: Y_AI_PRI...

☐ are not empty

☒ include any

Y_AI_PRIORITY

exclude any

are empty

Clear filters

Sample Smart List Workflow

In the morning

1. Call leads under “New”
2. Check “AI Priority” smart list

In the afternoon

1. Check for new Y_AI_PRIORITY tags
2. Follow up on “Important” list
3. Plan tomorrow’s priorities

Putting It All Together

Your New Daily Routine

1. **Start with “AI Priority” list** - these are your hottest leads
2. **Work through “New” and “Important” lists** - maintain momentum
3. **Update lead stages** based on your conversations
4. **Set up tomorrow’s priorities** before ending your day

Key Takeaways

- AI finds and warms your best opportunities
- Smart Lists 1-3 (“New”, “Important”, “AI Priority”) are your daily roadmap
- Speed wins! Faster follow up = better results

Resources and Support

- [AI² Success Playbook](#)
- Monthly Performance Reports (for license owners and admins only)
- The Client Success Team for strategy questions
- Attend [Office Hours](#)
- support@ylopo.com for technical issues

Questions?

Thank You!



YlopoAI

TEXT



Hi Tom, are you still looking at homes in the same area? Or have plans changed?

Wed, May 1 at 10:00AM

Hey Tom, this is Barry's assistant w/ Better Homes & Gardens. We chatted on the phone earlier today. It was great connecting with you. As mentioned, here's some **new listings** on the market for **3 bed, 2 bath in Virginia Beach**. <https://search.buyingva.com/2VPVkB> Let me know if you have any questions!

Today at 2:25PM

Oh and by the way, for your home **123 Main Street, Santa Monica, 90404**, we've prepared a home equity report for you <insert link>

Today at 2:30PM

great. I'll take a look



Over
25M+

text conversations

48
%

Response Rate

48% response rate



YlopoAI VOICE

