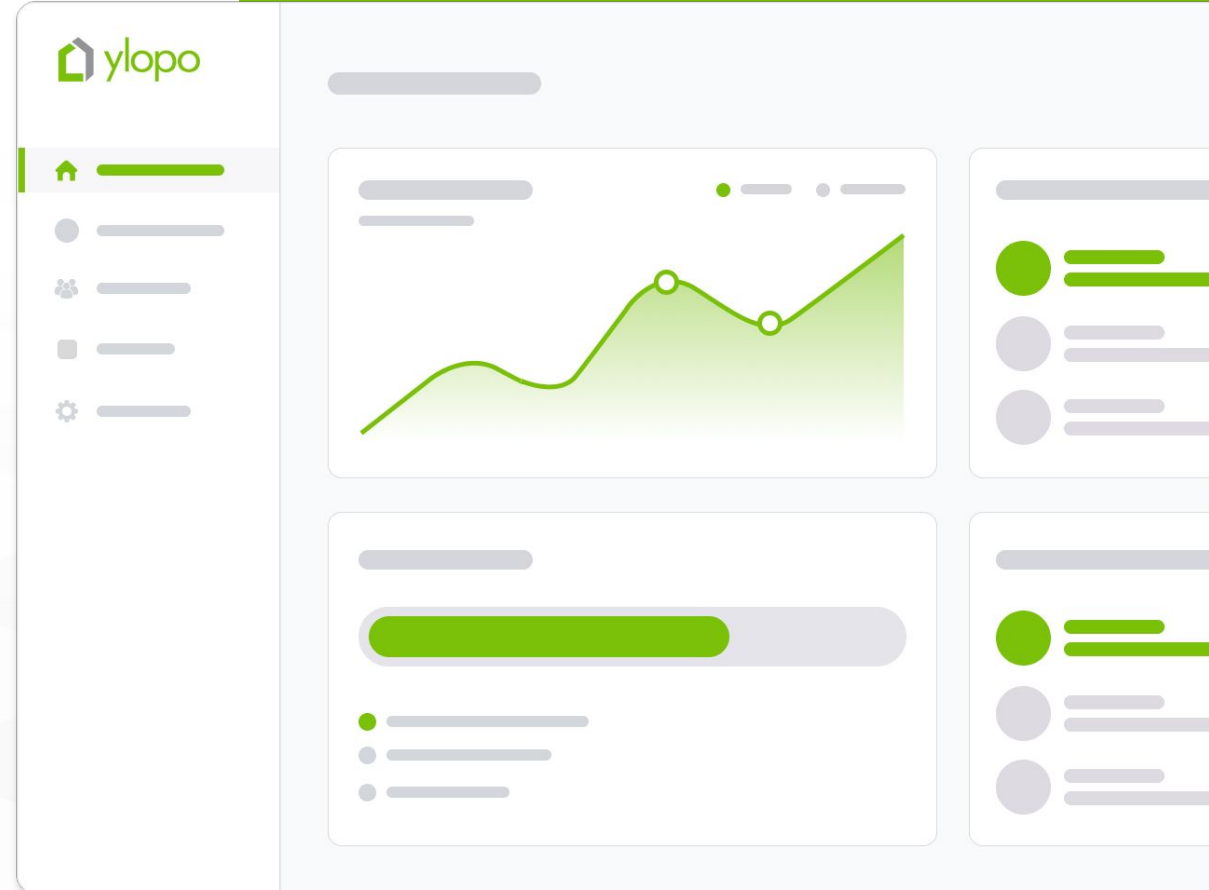




# Go Live Bootcamp

Build Your Daily System for Lead Conversion



[training@ylopo.com](mailto:training@ylopo.com)

Office Hours: Tues & Thurs



# What We're Covering Today

01. How Ylopo works inside your CRM

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02. Your daily lead conversion system

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03. Your Database: Why the import matters

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04. Stars as your engagement engine

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05. Marketing tools for your listings

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06. Your homework & next steps



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## You've done the setup.

Now let's build the system.

✓ Your home search site is live

✓ Stars is activated

✓ Your CRM is connected

✓ You've completed your online training

Today is about turning all of that into a daily habit that generates conversations and results.

# The Trifecta

## How Ylopo Works Inside Your Business



You live in your CRM. Ylopo lives inside it too—adding tags, alerts, and data back to every lead profile in real time.



# The Connected Ecosystem



Find the **Ylopo Stars Link** field in one of your leads and give us a thumbs up 👍 in the chat.

**Sarah Johnson**  
sarah.johnson@example.com  
(555) 123-4567  
New Lead

**Custom Fields**

- Ylopo Stars Link

**Stars Profile: Sarah Johnson**

- YLOPO\_ADWORDS ✓
- YLOPO\_FACEBOOK ✓
- YLOPO\_LSA ✓
- YLOPO\_ORGANIC ✓
- YLOPO\_GBP\_ADS ✓



# Your Daily Lead Conversion System

Three Lists. Worked Daily.



# The 3 Smart Lists You Work Every Day

## NEW

- ✓ Created < 10 days ago
- ✓ Stage: Lead
- ✓ Last comm > 12 hours

**Action Rule:** Speed matters. First contact within 24 hours.

## IMPORTANT

- ✓ Stage: Lead
- ✓ Tags: YPRIORITY, HANDRAISER, call\_now=yes
- ✓ Last comm > 1 day

**Action Rule:** These leads raised their hand. Same-day contact.

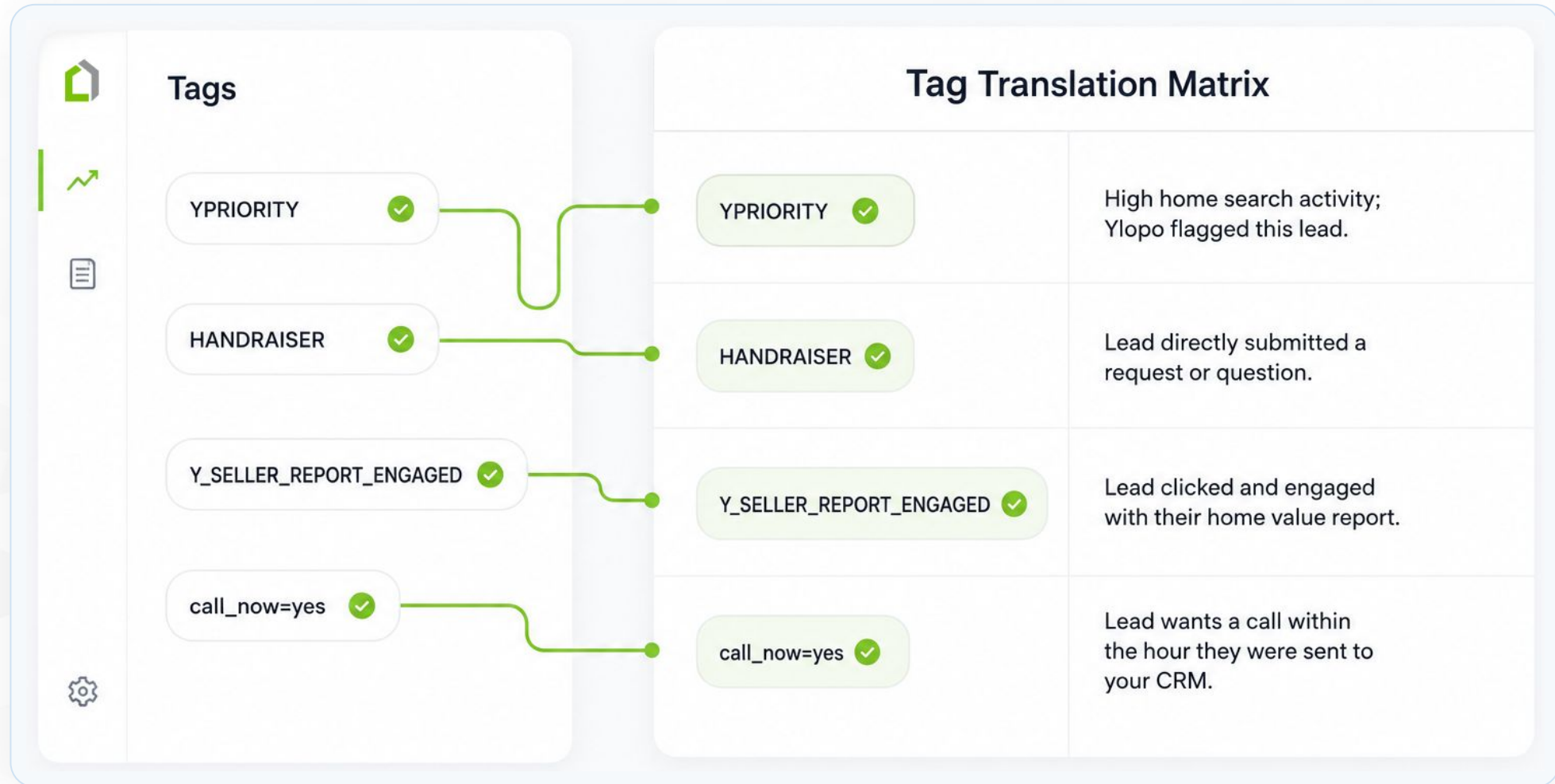
## AI PRIORITY

- ✓ Stage: Lead
- ✓ Tags: Y\_AI\_PRIORITY
- ✓ Last comm > 1 day

**Action Rule:** The AI flagged that the leads need your attention. Review activity and then reach out asap.



# Translating Signals into Action



# Build the Habit:

## Time-Blocking & Pipeline Health

The screenshot shows a calendar interface with a sidebar on the left containing icons for home, a graph, a list, and settings. The main area is titled "The Schedule" and displays a grid. Two time blocks are highlighted in green: "9:00-10:00am: AI PRIORITY + IMPORTANT" and "12:00-1:00pm: NEW". Other grid cells are empty or contain light gray placeholder bars.

### Pipeline Diagnostic Matrix

#### ✓ Healthy Pipeline

→ Stages move cleanly

→ "Appointment Set" has real names

→ Closed/Past Client stages grow over time

#### ⚠ Stuck Pipeline

→ Leads sit in "Lead" indefinitely

→ "Appointment Set" is empty

→ Hard to tell who is active vs. forgotten

Working leads reactively is how you lose them. Block the time.



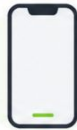
# Priority Notifications: Treat Them Like Ringing Phones

1



Priority Email

2



Priority Text

3



CRM Tag

4



CRM Note

ANY Priority Activity Triggers ALL Notifications



**Priority notifications = same-day response.**  
Within hours, not days. Treat it like a warm inbound call.



# Trigger to Script: 2-Minute Outreach

- Read priority text or email
- Click CRM link
- Read trigger
- Open Stars
- Deploy Script



**High search activity**



“Hey [Name], I noticed you’ve been doing some serious home browsing. Did anything catch your eye?”



**Seller report engaged**



“Just wanted to check in if you got the chance to look at the home value report we sent?”



**Responded to AI Text**



“I saw you responded to my assistant—happy to jump in! I’m [your name], what questions do you have?”



# Your **Database** Is an Asset—Only If It's in Stars



# Trigger to Script: 2-Minute Outreach



## The Invisible Database

Ylopo cannot remarket to them online.

Activity tracking on your site is completely dark.

Cannot set listing/seller alerts.

The system doesn't know they exist.



## The Activated Database

Remarketing deployed with your brand on social media.

Search activity is tracked and important activity surfaced to CRM.

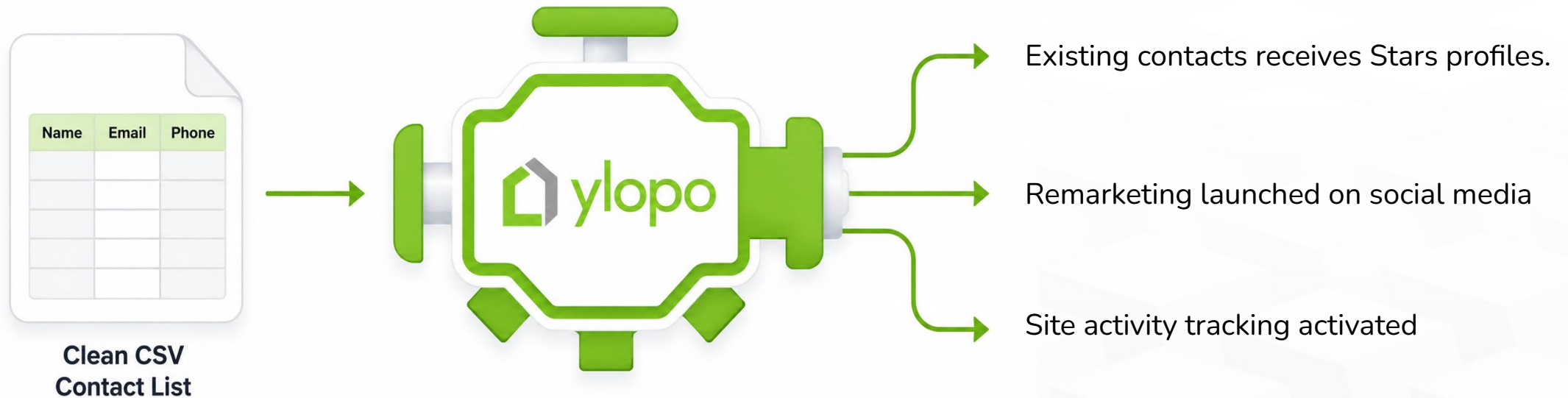
Engaged with automated listing/seller alerts.

You get notified the moment an old lead warms up.



# Your Next Task: The Mass Lead Import

Your OPM will guide you through this—but here's why it matters.



**Task Incoming:** Watch for this in your onboarding portal. Your OPM will assign it, don't skip it!



# Stars: From Tools to Strategy

You've seen what Stars does.  
Now let's talk about when and why to use it.



# The Stars Engagement Playbook



## Listing Alerts

**Best for:** Active buyers, imported contacts

“A few new homes just hit the market... wanted to make sure you saw these.”



## Seller Alerts

**Best for:** Contacts with known address, past clients

“Home values in your area shifted. Did you get a chance to see the report?”



## Lead Message Inbox

**Best for:** Leads engaging with AI Text

**Rule:** Check daily. AI starts the conversation, you close it.



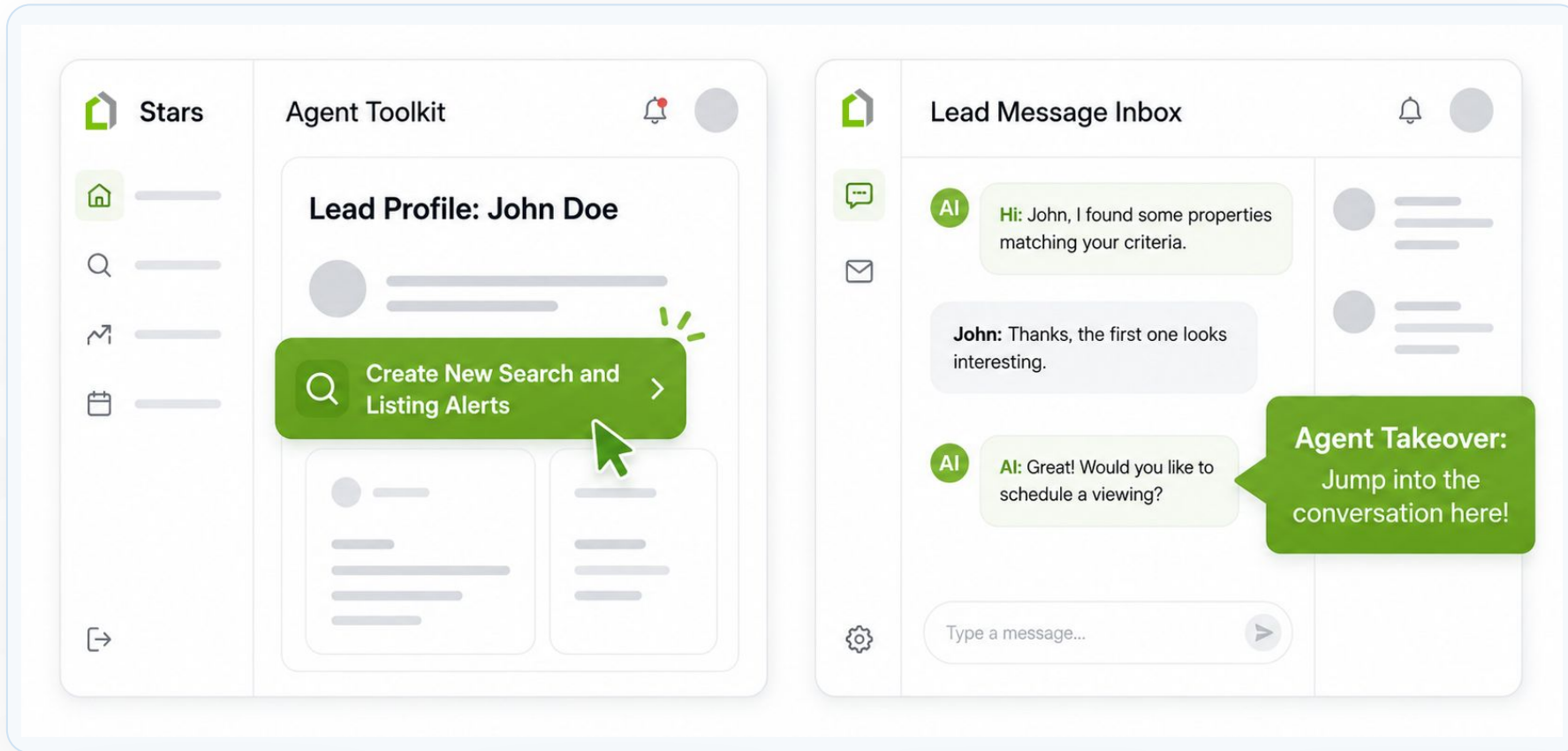
## Push Listings

**Best for:** Active buyers you're talking to. Handpick 3-5 properties.

“I pulled a few listings I think you'd want to see.”



# Demo: Setting Up Engagement and Reading Signals



## Daily Prompt:

Who is the AI texting right now? Is anyone warming up? Is there a conversation I should jump into personally?

1 Navigate to a lead profile in Stars

2 Set up a listing alert

3 Open the Lead Message Inbox

4 Read the AI Text thread



# Turn Active Listings Into Lead Magnets

No production team required.



## Listing Rockets

Promote a specific listing on social media to generate buyers for your client and drive traffic to your home search site.



## DyVA (Dynamic Video Ads)

Automatically generated video ads built directly from your MLS listing data. Stand out in feeds instantly.



## Custom Ads

Ultimate control over marketing specific neighborhoods, open houses, or brand campaigns.



# Your Homework Before Your Next Check-In

These are the habits that separate top performers.



## Daily Habits (start this week!)

Block time on your calendar to work your NEW, IMPORTANT and AI PRIORITY smart lists every day

Respond to every priority notification the same day

Check your inbox (Stars or FUB) every morning



## Upcoming Task

Begin to prep for your mass lead import. Get your existing database into Stars so Ylopo can remarket to them and track their activity.



# Training & Support



## Online Training Courses

Self-paced learning modules for every tool.



## Go Live Bootcamp

This session (recording will be emailed after).



## Coaches Office Hours

Live Q&A with our expert Coaches every Tuesday and Thursday.



## Support Center

Our support website to learn about Ylopo products and services, and get help.



## Knowledge Base

How-tos and articles.



## Ylopo Success Community

Our private Facebook group. Interact with the lovely Ylopo community, share wins and strategies.

[training@ylopo.com](mailto:training@ylopo.com)

Answers within  
24 hours





# Now Go Work Some Leads!

1. Open your CRM, navigate to your IMPORTANT list and find one lead to contact right now.

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2. Block your lead-work time on your calendar before you exit the meeting.

---

3. Register for Office Hours.



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# Thank You!

