

Agent Quick Start Training



Every Tuesday, 10AM PST



2026 CHARLESTON



SUCCESS SUMMIT
CHARLESTON



Tuesday and Wednesday
May 19th & 20th 2026



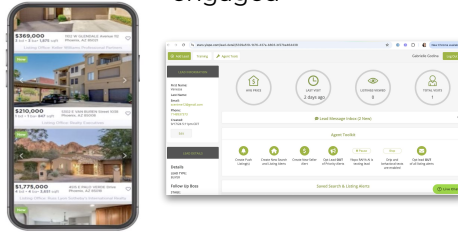
The Charleston Gaillard Center
95 Calhoun St, Charleston, SC 29401

What **Ylopo** Does For You

✓ Generates leads through Facebook and Google ads and retarget them with remarketing



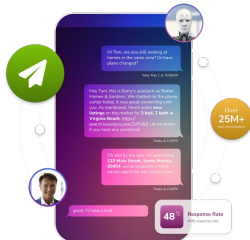
✓ Provides you with websites that track their activity and keep them engaged



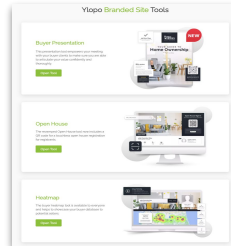
✓ Alerts you of important lead activity



✓ Improves your speed-to-lead and follow up strategy via AI Text and AI Voice



✓ Provides tools to help you make buying and selling conversations more productive and successful



✓ Plugs right in to your CRM to keep you organized



Today's Agenda

- Your Success Story Starts Here
- Ylopo Stars: Your Command Center
- Priority Alerts: Never Miss a Hot Lead
- Ylopo AI: Managing Conversations
- Branded Site Tools: Your Closing Arsenal
- Your First Week Action Items
- Q&A

What's your biggest challenge with lead follow up ?

Agent Mike's Success Story

Before Ylopo

- 11 closed deals last year
- Missed hot leads often
- Felt overwhelmed and reactive
- Seldom used his tools

After Ylopo

- 18 closed deals so far (63% increase)
- Never misses priority leads
- Confident and proactive
- Clients see him as the expert

Mike's Typical Day

(Eastern Time Zone)

5AM - 7AM Wake up, shower, meditate

8AM Check Google My Business

Responds to new reviews,
answers questions

9AM - 12PM Check his inbox, priority alerts,
tasks (FUB) and work through
his smart lists

New Leads, Important and AI
Replies smart lists. He reviews
AI conversations and takes
over appointment-ready leads

12PM - 1PM Attend Coaches Office Hours

1PM Lunch

2PM - 5PM Appointments

Uses the various
Ylopo tools in his
listing and buyer
appointments

6PM Check FUB and write cards

Ylopo Stars : Your Command Center

Where the Ylopo Magic Happens

The image displays the Ylopo Stars Command Center interface, which is a web-based platform for managing real estate leads. The interface is divided into several sections:

- Lead Information:** Displays key metrics for a specific lead (Vanessa):
 - AVG PRICE: Represented by a house icon with a dollar sign.
 - LAST VISIT: 2 days ago, represented by a clock icon.
 - LISTINGS VIEWED: 0, represented by an eye icon.
 - TOTAL VISITS: 1, represented by a person icon.
- Lead Message Inbox (2 New):** A section for managing incoming messages from the lead.
- Agent Toolkit:** A collection of tools for agents to interact with the lead:
 - Create Push Listing(s)
 - Create New Search and Listing Alerts
 - Create New Seller Alert
 - Opt Lead OUT of Priority Alerts
 - Ylopo RAIYA AI is texting lead (with a Pause button)
 - Drip and behavioral texts are enabled (with a Stop button)
 - Opt lead OUT of all listing alerts
- Saved Search & Listing Alerts:** A section for managing saved searches and alerts, featuring a Live Chat button.
- Lead Details:** A sidebar on the left showing lead information:
 - First Name: Vanessa
 - Last Name: [Redacted]
 - Email: [Redacted]
 - Created: 9/17/24 5:11pm CDT
 - Follow Up Boss: STAGE: [Redacted]
- Custom Fields:** A section for adding custom fields to the lead profile, including a link to the Stars Profile.

A green box highlights the "Custom Fields" section, and a green arrow points to the "Link to Stars Profile" button.

Who's in Your **Stars** Database?

1. **Ylopo-Generated Leads**
 - From Facebook & Google ads
 - Automatic import to Stars
2. **Auto-Imported Sources**
 - Lead sources selected by license holder
 - Automatic import and nurture to Stars
3. **Your Existing Lead Database**
 - Request a mass lead import by emailing support@ylopo.com
4. **Manually Added Leads**
 - Individual contacts you want to nurture

Confirm that you already have your **Stars login**; fill out the **Agent Profile Questionnaire** to get started.

Ask your license holder if you're getting **new leads from Ylopo** and **what sources** are set up to auto-import!

Your Stars Toolkit

Listing Alerts

Emails that keep buyers engaged with new and updated listings within their search criteria

Seller Alerts

Nurture homeowners with info regarding their home value and selling options

Push Listings

Emails containing hand-picked listings from you

Lead Activity Tracking

See what they like, what they're viewing, how often they visit your site

Lead Message Inbox

Monitor AI Text conversations

A Quick Tour of Your **Stars Toolkit**



AVG PRICE
\$885,000



LAST VISIT
11 days ago



LISTINGS VIEWED
1



TOTAL VISITS
1

Lead Message Inbox (2 New) ▾

Agent Toolkit



Create Push Listing(s)



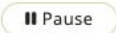
Create New Search and Listing Alerts



Create New Seller Alert



Opt Lead **OUT** of Priority Alerts



Ylopo AI is texting lead



Drip and behavioral texts are enabled



Opt lead **OUT** of all listing alerts

**For a deeper dive,
join the Stars Crash Course**



**STARS
CRASH
COURSE**

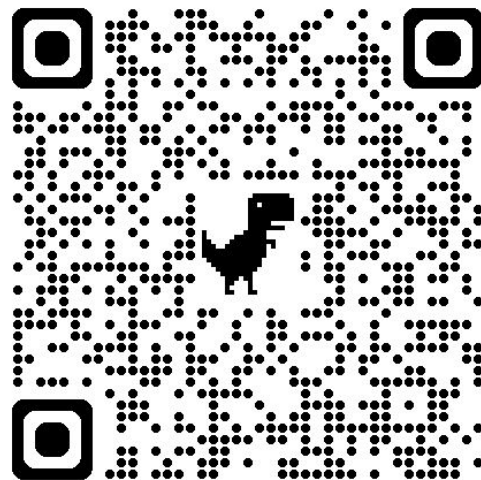
45 minutes session covering the
Ylopo fundamentals

 **EVERY TUESDAY**
at 1 pm PST

 ylopo

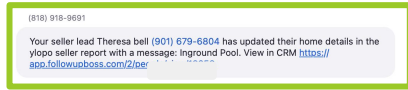


 bit.ly/47ykwhT

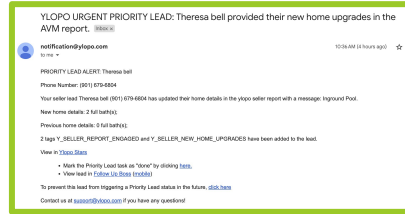


Priority Alerts : Never Miss a Hot Lead

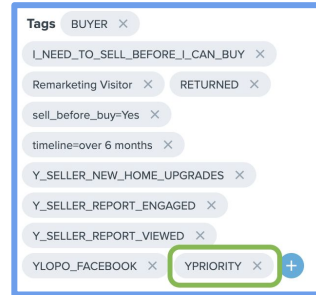
Your Lead Radar



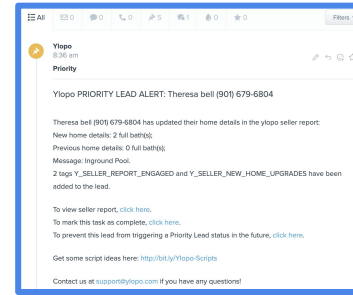
Priority Text
sent to agent



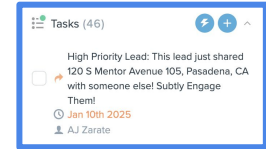
Priority Email
sent to agent



YLPRIORITY tag
added on lead
profile



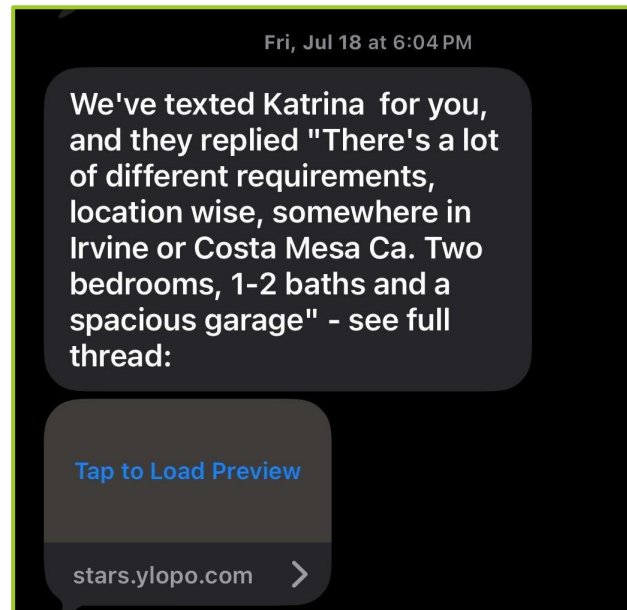
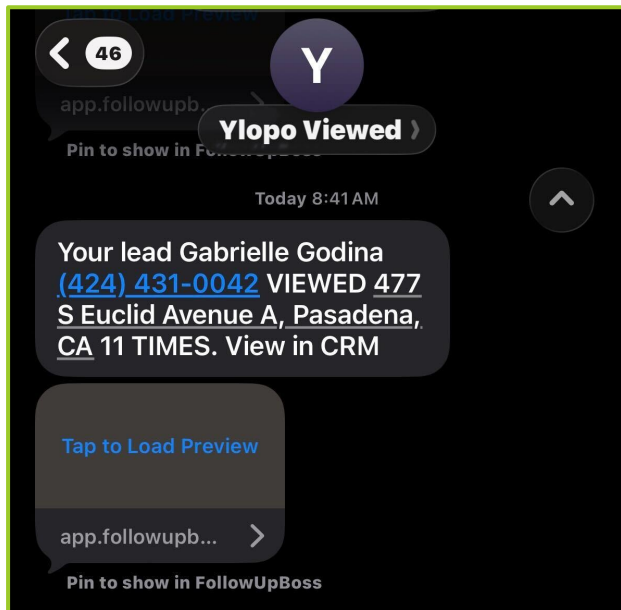
Priority note in
CRM



(FUB, Sierra)
Priority task
created

What would make YOU reach out to an agent immediately?

Priority Alerts: **Text**



Priority Alerts: Email

Unread				1-10 of 10	
☐	☆	Heymarket	100% Message Threshold Reached - Hello, An inbox, Client Success...	2:16 PM	
☒	☆	notification	YLOPO HIGH PRIORITY LEAD: Jamieeeee Mueller viewed 1762 Ne ...	2:05 PM	
☐	☆	'Confluence' via Ho.	Ylopo Team, your team is working on these pages--join the conve...	1:55 PM	
☐	☆	Zoom	Meeting Analytics from Read has joined your Personal Meeting R...	10:59 AM	

2 of 10

YLOPO HIGH PRIORITY LEAD: Jamieeeee Mueller viewed 1762 Ne 39th Street, OCALA, FL 3 times

notification@ylopo.com
to: [REDACTED]

2:05 PM (53 minutes ago)

PRIORITY LEAD ALERT: Jamieeeee Mueller

Phone Number: (239) [REDACTED]

Jamieeeee Mueller VIEWED [1762 Ne 39th Street, OCALA, FL](#) 3 TIMES.

View in [Ylopo Stars](#)

Recommend actions:

1. Review their profile/preferences.
2. Call/text the lead (239) [REDACTED] to subtly engage them in their search or schedule a showing
3. Find similar homes and send a [Push Listing](#) by text.
4. Mark the Priority Lead task as "done" by clicking [here](#).
5. View lead in [Follow Up Boss \(mobile\)](#)

To prevent this lead from triggering a Priority Lead status in the future, [click here](#)

Contact us at support@ylopo.com if you have any questions!

Reply

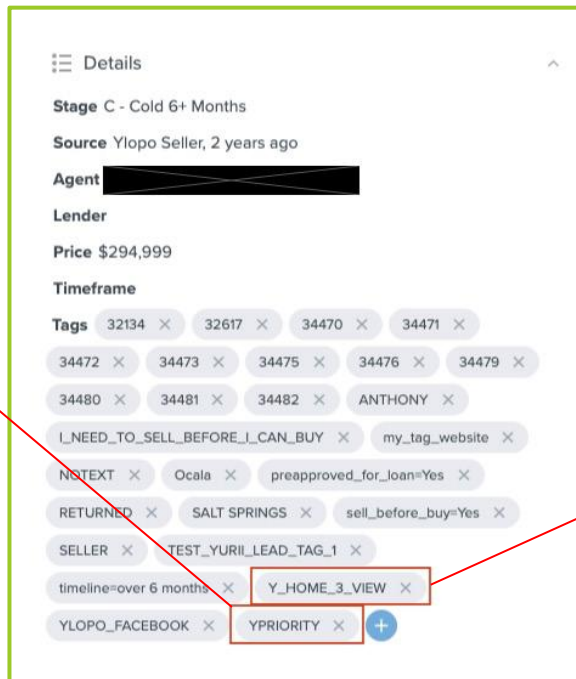
Reply all

Forward

Priority Alerts: Tags

YPRIORITY is the generic, catchall tag that indicates that a lead that has performed some high intent action on your home search site and/or requested for more information. Every priority alert will result in this tag being added to the lead.

On the other hand, **Y_AI_PRIORITY** is the catchall tag for all priority activities triggered through engagement with AI Text or AI Voice.



In addition to the catchall YPRIORITY tag, Ylopo will append other tags that give you more information about the lead action that triggered the priority alert.

In this example, **Y_HOME_3_VIEW** means the lead viewed one specific listing 3 times. When you hover over tags in FUB, you will also see the timestamp when the tag was added and who added it.

Priority Alerts: CRM Note and Priority Task

**Ylopo**
2:05 pm
Priority

Ylopo PRIORITY LEAD ALERT: Jamieeeee Mueller (239) [REDACTED]

Jamieeeee Mueller VIEWED [1762 Ne 39th Street, OCALA, FL](#) 3 TIMES.

Recommend actions:

1. Review their profile/preferences
2. Call/text the lead (239) [REDACTED] to subtly engage them in their search or schedule a showing
3. Find similar homes and send a [Push Listing](#) by text.

To view seller report, [click here](#).

To mark this task as complete, [click here](#).

To prevent this lead from triggering a Priority Lead status in the future, [click here](#).

Get some script ideas here: <http://bit.ly/Ylopo-Scripts>

Contact us at support@ylopo.com if you have any questions!

A CRM note is also added to your lead record whenever a priority alert is triggered. The note includes a summary of the lead activity, recommended actions and various links .

(in FUB and Sierra CRMs only)
Recommended actions are created as priority tasks. If the agent checks off the task, it automatically removes the YPRIORITY tag.

 **Tasks (2)**   



Ylopo High Priority Lead: this Lead viewed 1762 Ne 39th Street, OCALA, FL 3 times - subtly engage them

 Jul 30th 2025

 [REDACTED]

[View 1 completed task](#)

Some **Essential Tags** to Look Out For

YPRIORITY

The catchall tag for all priority activity triggered by website or marketing engagement

HANDRAISER

Added when a lead fills out any of the call-to-action forms on your home search site

Y_AI_PRIORITY

The catchall tag for all priority activity triggered by interactions with Ylopo AI

AI_NEEDS_FOLLOW_UP

Added when a lead expresses high intent resulting from a conversation with AI Text and requires follow up from an agent.

AI_VOICE_NEEDS_FOLLOW_UP

Added when a lead expresses high intent during an AI Voice call attempt which requires follow up from an agent



Pro Tip:
**Use these tags to
create Smart Lists in
your CRM**

Let's Create Smart Lists

Here are some of our recommended ones

1 New

New leads, no recent call/text

🕒 Last Communication more than... ^

☐ is not empty

☐ was less than

☒ was more than

hours ago ▾

☐ is empty

🔗 Tags exclude any of: Import ^

☐ are not empty

☐ include any

☒ exclude any

Import ×

+

☐ are empty

☰ Stage includes any of: Lead ^

☒ include

Lead ×

+

☐ exclude

🕒 Created less than 10 days ago ^

☒ was less than

☐ was more than

days ago ▾

Clear filters

2 Important

Priority leads

🕒 Last Communication more than... ^

☐ is not empty

☐ was less than

☒ was more than

days ago ▾

☐ is empty

🔗 Tags include any of: YPRIORITY... ^

☐ are not empty

☒ include any

YPRIORITY ×

HANDRAISER ×

Y_SELLER_REPORT_ENGAGE D ×

Y_SELLER_REPORT_VIEWED ×

CALL_NOW=YES ×

+

☐ exclude any

☐ are empty

☰ Stage includes any of: Lead ▾

Clear filters

3 AI Priority

🔗 Tags include any of: Y_AI_PRI... ^

☐ are not empty

☒ include any

Y_AI_PRIORITY ×

+

☐ exclude any

☐ are empty

☰ Stage includes any of: Lead ^

☒ include

Lead ×

+

☐ exclude

🕒 Last Communication more than... ^

☐ is not empty

☐ was less than

☒ was more than

days ago ▾

☐ is empty

Clear filters

The **Response Time** Reality

Priority Leads:	Respond within 1 hour
Hot Activity:	Same day response
Best Practice:	Call, don't just text
Success Metric:	80% same-day response rate

*Priority means **urgent**, not convenient.*

Ylopo AI² : Managing Lead Conversations

AI Text + AI Voice

AI Text: Engages new leads, responds to priority activity, and revives old cold leads

Jul 30, 2024 at 10:23 am **Ylopo**

Hi, Gabie? This is Matt's assistant w/ EXP Realty. We can end anytime, but I had a note you were searching online in IRVINE. Have you zeroed in on any neighborhoods or school zones you'd like to move to one day?

AI Voice: 14 calls over 90 days to new Ylopo leads, soon to include database leads



AI Reality Check

What Ylopo AI Really Does:

- Engages new leads automatically
- Nurtures cold leads consistently
- Qualifies interest and timing
- Keeps conversations going
- Identifies ready-to-buy signals

What You* Control

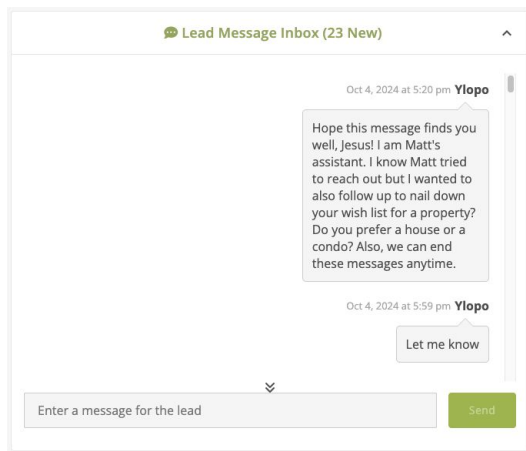
- ✓ Lead stages that are eligible for AI
- ✓ Whitelisting/blacklisting agents
- ✓ Lead sources that are eligible for AI
- ✓ Business hours for calling and texting

What You DON'T Control

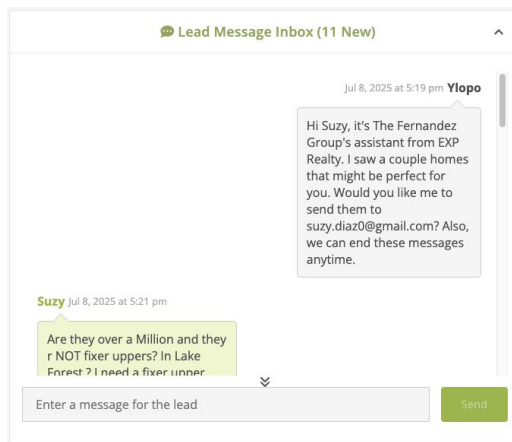
- ✗ Exact message content or call script
- ✗ Precise timing of the texts and call attempts

Real AI Text Threads

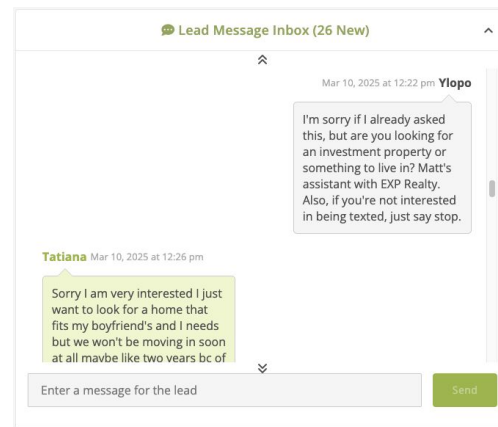
Example 1
AI Text nurturing a
cold lead



Example 2
Lead asking specific
questions



Example 3
Lead showing buying
signals



When to Take Over the Conversation

- When the lead triggers a priority alert such as
Y_AI_PRIORITY
AI_NEEDS_FOLLOW_UP
HANDRAISER
AI_VOICE_NEEDS_FOLLOW_UP
CALL_NOW=YES
- When the conversation is going awry, take over and course correct

IMPORTANT!

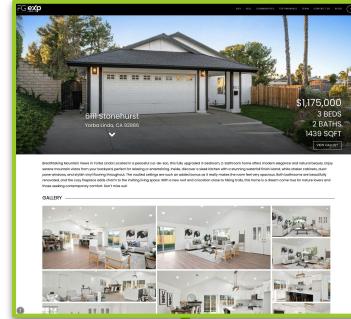
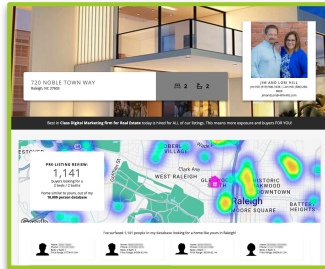
When using the Stars Lead Message Inbox to text, be sure to preserve the assistant persona. Text the lead as the assistant and hand the lead off to yourself so you can continue the conversation using your actual phone number.

Branded Site Tools : Your Closing Arsenal

Listing Detail Page

Buyer Presentation

Heat Map



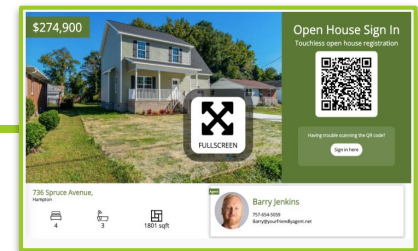
Single Listing Flyer



A to Z Design Studio



Open House Tool



Where to Find Your **Branded Site Tools** Page

To access the tools page, your branded site needs to be published. Ask your license holder if you're unsure of your branded site status.

- Add **/tools** at the end of your branded site URL.
Example: <https://www.hillnhills.com/tools>
- From any Stars link, click the “Agent Tools” button on the top left corner of the page



What are the **Branded Site Tools** ?

A TO Z DESIGN STUDIO

All your marketing tools in one place, including Buyer Presentation, Listing Presentation, Heatmap and more.

OPEN HOUSE TOOL (/open-house)

Combines digital registration with traditional open house methods that automatically adds open house visitors to your CRM and Stars

BRANDED MARKET TRENDS (/branded-market-trends)

A report that offers buyers highly relevant and localized data on their market using their address, city or zip code

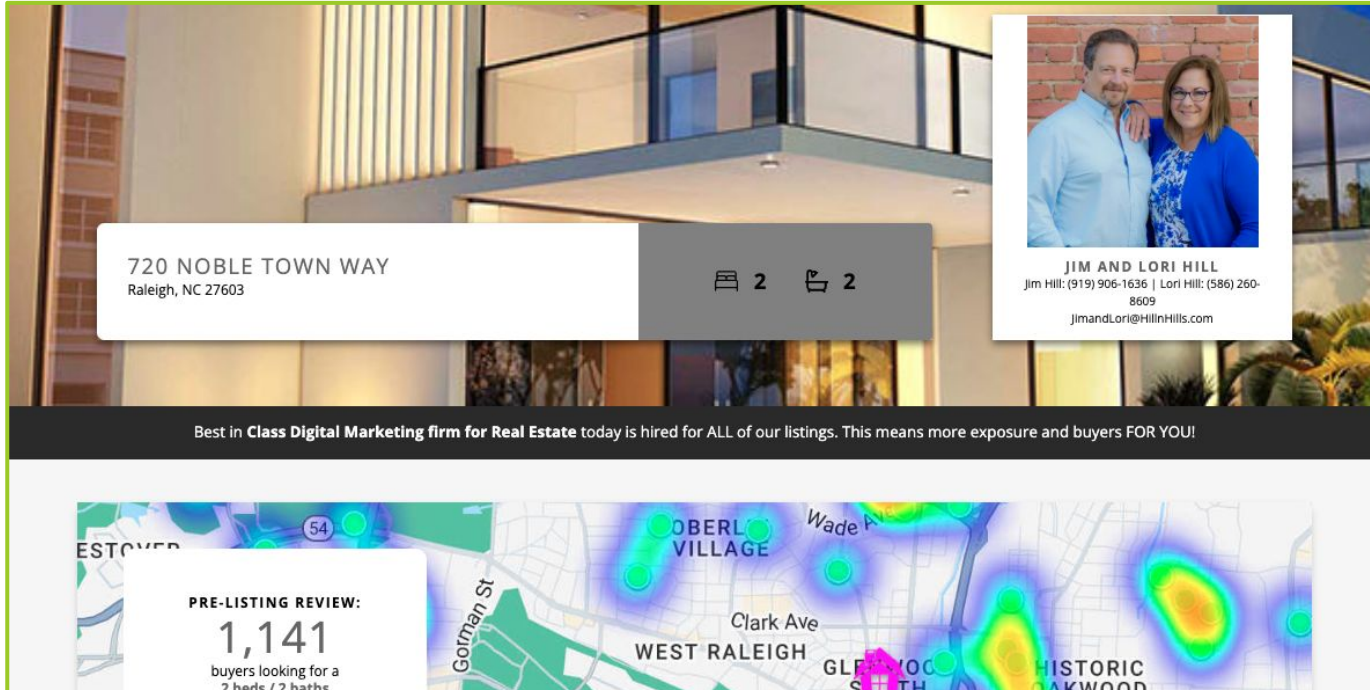
BUYER PRESENTATION (/buyer-presentation)

A customized presentation for buyer prospects that provides local market insights, curated listings, your reviews, all tailored to your buyer's area

SINGLE PROPERTY FLYER (/single-listing-flyer)

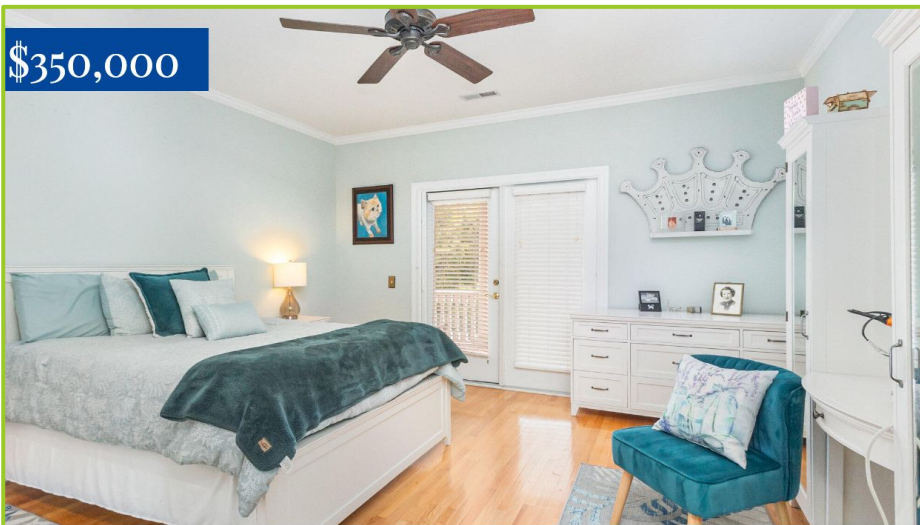
This tool lets you design a beautiful landing page for a single listing that you can publish on your branded site and even print to bring to your listing appointments

Buyer Heatmap Tool Demo



Open House Tool Demo

\$350,000



Open House Sign In

Touchless open house registration



Having trouble scanning the QR code?

[Sign in here](#)

7520 Lead Mine Road 202,
Raleigh, NC 27615



2



2



1545 sqft

Agent



Jim and Lori Hill

Jim Hill: (919) 906-1636 | Lori Hill: (586) 260-8609
328898/327431
jimandlori@HillnHills.com

For a deeper dive on ALL the tools, join **Tools Tuesday on Coaches' Office Hours**



COACHES OFFICE HOURS

Learn from the experts!

 Every Monday, Tuesday,
Thursday and Friday

 9:00 AM Pacific Time
(US and Canada)

 bit.ly/Coach-Office-Hours



HOST

Matt Croteau
Ylopo Coach



HOST

Chris Phares
Ylopo Coach



HOST

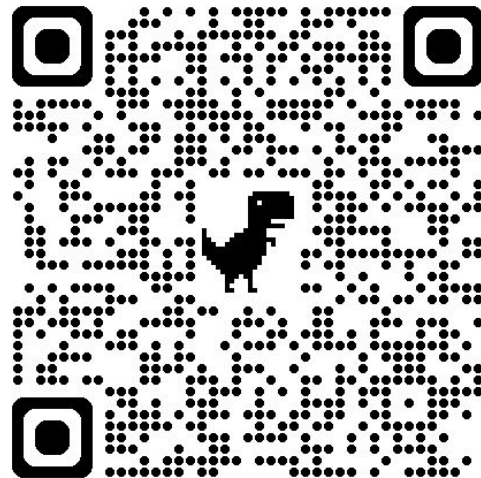
Jim Hill
Ylopo Coach



HOST

Marissa Canario
Ylopo Coach





Your First Week Action Items

Your Success Starts Now

DAY 1: TOMORROW

- ✓ Log in to Stars or submit your Agent Profile Questionnaire to get your login if you haven't already done so
- ✓ Access Stars from any lead profile in your CRM
- ✓ Create one smart list for priority leads
- ✓ Bookmark your home search site
- ✓ Bookmark your branded site tools page
- ✓ Confirm with your license holder if you have AI Text and AI Voice, and ask about your AI settings

WEEK 1 CHALLENGE

- ✓ Use one branded site tool with a prospect
- ✓ Respond to at least 2 priority alerts
- ✓ Review 5 AI conversations
- ✓ Attend at least one Coaches Office Hours
- ✓ Join the [Ylopo Success Community](#) Facebook group
- ✓ BONUS: Share one win in the YSC!

Your Success Resources

Get Help and Keep Growing

←

→

G

stars.ylopo.com/lead-detail/a1b0a7c2-232d-463f-9...

+

Add Lead

Transfer Lead

Training

Agent Tools

LEAD INFORMATION

First Name:
Test

Last Name:
testtt

Email:
test@email2.com

Phone:
+12012252120

Created:
12/4/24 4:58pm CST

AVG PRICE

SUPPORT CENTER

Home Ylopo Services Money-making Tools Account Changes Ylopo Training Ylopo Training Upcoming Events Access Ylopo's Help Center Previously Recorded Ylopo Best Practices Ylopo Coach Connect Go Live Bootcamp ROI Diagnostics Client Checklists Ylopo Integrations Ylopo Terms Glossary

Start your learning journey here!

As a Ylopo user, you have essential skills and knowledge available to you. We offer live webinars designed to empower you with the information before to get valuable insights and hands-on guidance from our expert trainers and coaches!

New Client
GO LIVE BOOTCAMP
This training is designed for new Ylopo users, providing a step-by-step guide to getting started with the platform. It covers everything from account setup to your first lead.

Go Live Bootcamp
Jumpstart your success with this session that covers everything you need to know...
When: Tuesdays, Thursdays and Fridays (time varies)
Best for: Ylopo Users in Setup, Newly-Live Users, Newly-Onboarded Account Admins
[Learn More](#)

Ylopo
COACHES OFFICE HOURS
Get ready for successful leads!
Learn from the best coaches in the industry, sharing their secrets and strategies for success. This is a great opportunity to get personalized advice and support from the experts.

Coaches Office Hours
Come hang out and get all your Ylopo-related questions answered by our resident Coaches, who will share their best practices, strategies, and hacks. Participants also share their success stories and advice, and build community with each other.
When: Everyday @ 5pm PT/2pm ET
Best for: All Ylopo users
[Register Now](#)

Ylopo
REALTORS-IN-RESIDENCE OFFICE HOURS
Every Wednesday, our amazing Ylopo Realtors-in-Residence joins Office Hours to do what they do best: inspire and educate the Ylopo community. This is a great opportunity to get face-to-face with these icons of the industry and pick their brains on everything real estate.
When: Wednesdays @ 5pm PT/2pm ET
Best for: All Ylopo users
[Register Now](#)

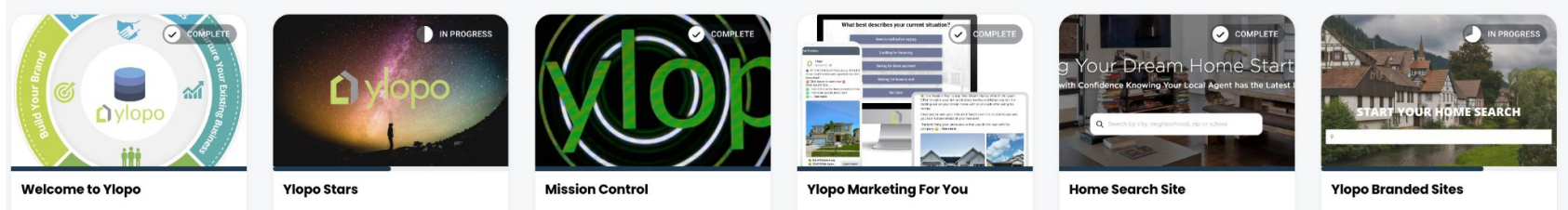
Ylopo
LEAD IMPORT MASTERY
TURBOCHARGE YOUR ROI with Ylopo
EVERY STUDY WEDNESDAY!
You know all your leads need to be in Ylopo, but you're unsure where to begin? Register for this session to learn the step-by-step of getting your database imported to Ylopo, and see what your leads receive when they're being nurtured by Ylopo.
When: Every other Wednesday @ 1pm PT/4pm ET
Best for: Ylopo users who have not completed a mass lead import
[Register Now](#)

Ylopo
Ylopo New User Training
Learn the basics of Ylopo and how to get started with your account. This course covers everything from account setup to your first lead.

Ylopo
AI Voice 100: Get to Know AI Voice
Learn how to use AI Voice to generate leads and manage your business. This course covers everything from account setup to your first lead.

Ylopo
BUYER AGENT COMMISSION MASTERY
Learn how to maximize your commission as a buyer agent. This course covers everything from account setup to your first lead.

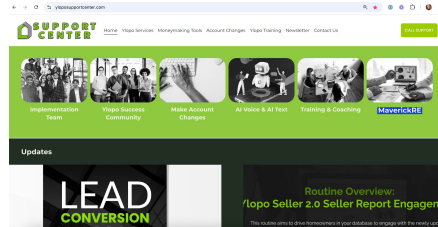
Online Training



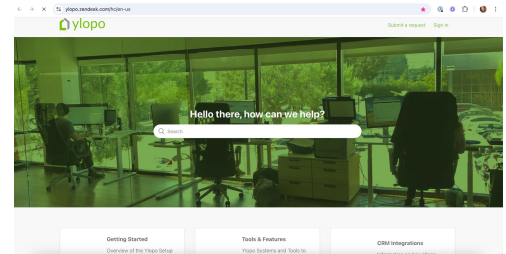
Live Training



Ylopo Support Center



Knowledge Base



Coaches Office Hours

- ★ **"Mastery Monday"**: Master your Smart Lists, Stages, Automations, Follow Up, and Scripting
- ★ **"Tools Tuesday"**: Get plugged in and leverage Ylopo's powerful tools, such as Heatmap, DyVA, Listing Rockets and Listing Presentations
- ★ **"Realtors-in-Residence Office Hours"**: Realtors-in-Residence Livia Monteforte, Marissa Canario, Barry Jenkins and Gabe Cordova join on Wednesdays, to share their expert advice and give us the run down on Ylopo!
- ★ **"All About Imports Thursday"** - Mass lead import and seller import
- ★ **"FUB Friday"**: A deep dive on Follow Up Boss

Thank You!

Email us at support@ylopo.com