

Agent Quick Start Training



Every Tuesday, 10AM PST



 ylopo

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



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



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



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



- ✓ Alerts you of important lead activity



- ✓ 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

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

12PM - 1PM Attend Coaches Office Hours

1PM Lunch

2PM - 5PM Appointments

6PM Check FUB and write cards

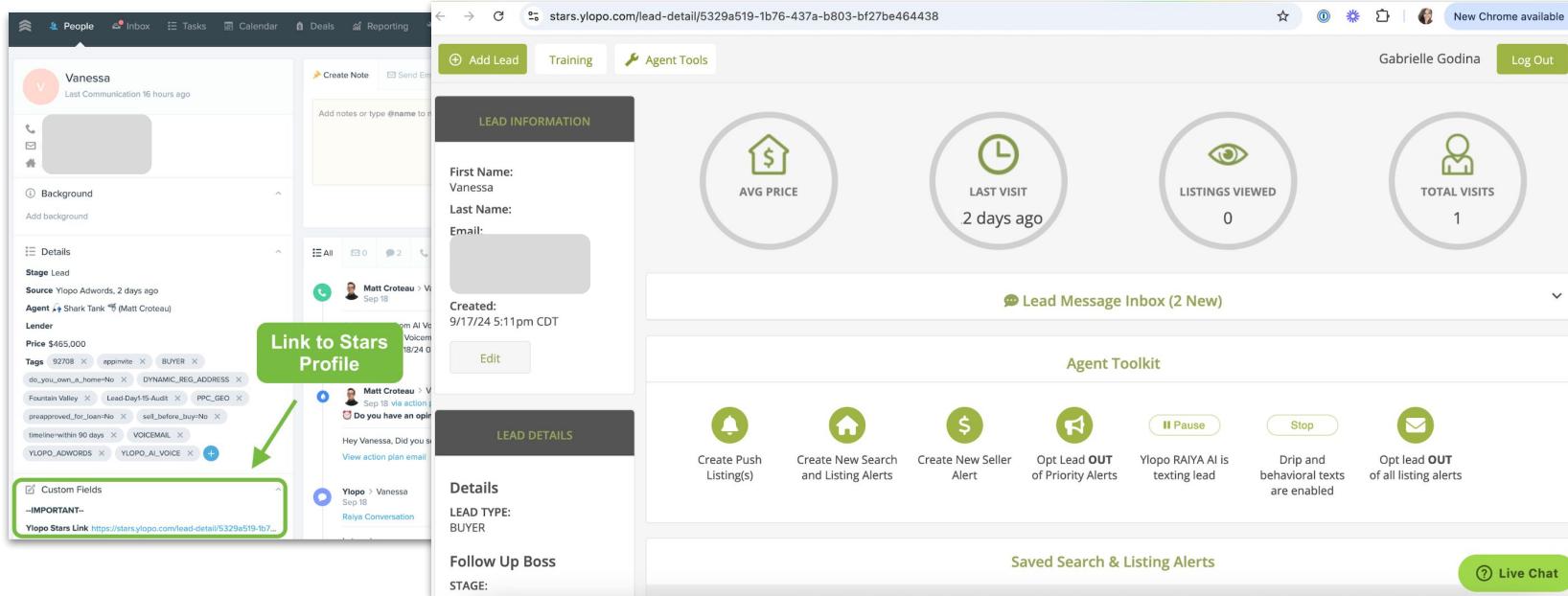
Responds to new reviews, answers questions

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

Uses the various Ylopo tools in his listing and buyer appointments

Ylopo Stars : Your Command Center

Where the Ylopo Magic Happens

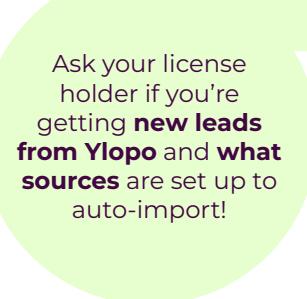


Who's in Your **Stars** Database?

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	 Stop	 Opt lead OUT of all listing alerts
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**For a deeper dive,
join the Stars Crash Course**

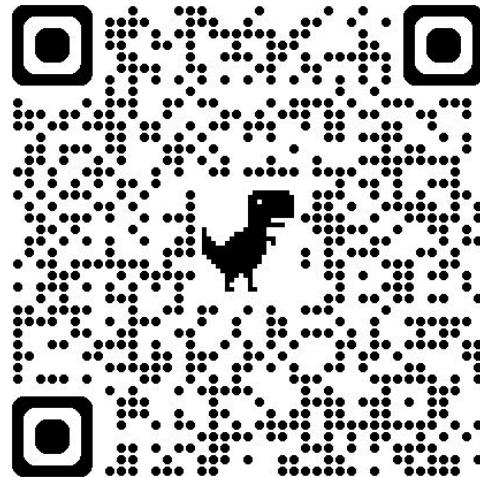
**STARS
CRASH
COURSE**

45 minutes session covering the Ylopo fundamentals

 **EVERY TUESDAY**
at 1 pm PST

 bit.ly/47ykhWT



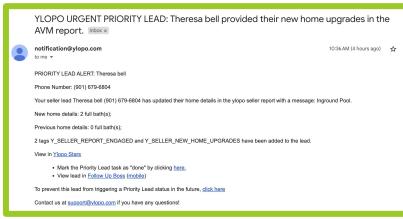
Priority Alerts : Never Miss a Hot Lead

Your Lead Radar

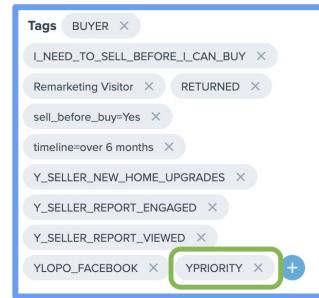
(818) 918-9691

Your seller lead Theresa bell (901) 679-6804 has updated their home details in the ylopo seller report with a message: Inground Pool. View in CRM <https://app.ylopo.com/lead>

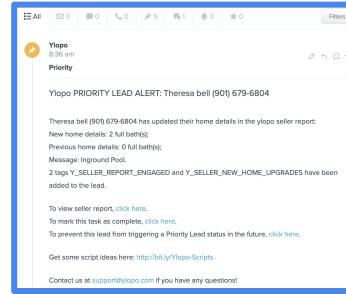
Priority Text
sent to agent



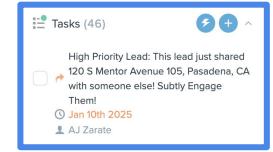
Priority Email
sent to agent



YPRORITY tag
added on lead
profile



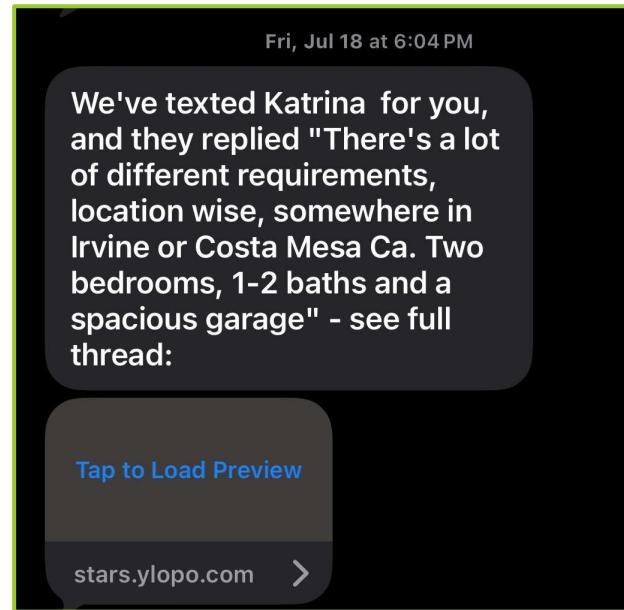
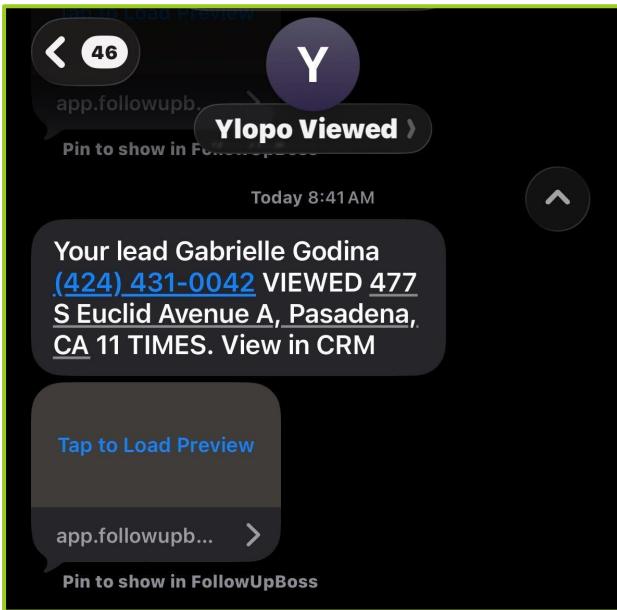
Priority note in
CRM



(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

From	Subject	Time
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

YLOPO HIGH PRIORITY LEAD: Jamieeeee Mueller viewed 1762 Ne 39th Street, OCALA, FL 3 times [Inbox](#)

notification@ylopo.com to a [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](#)

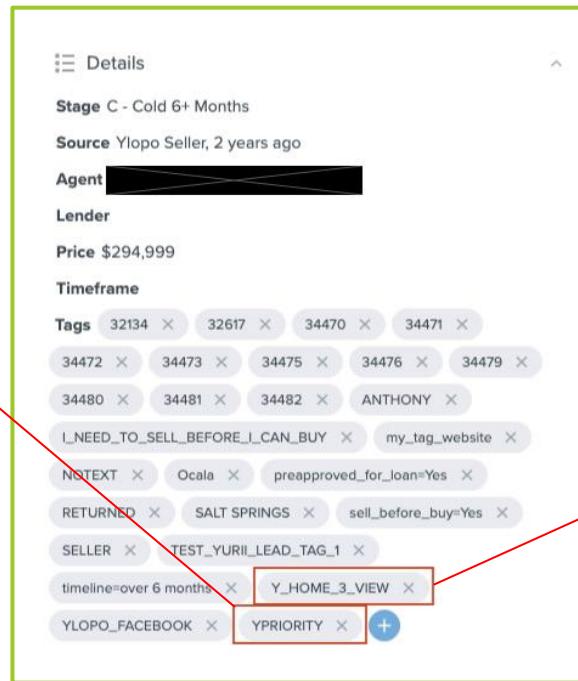
Contact us at support@ylopo.com if you have any questions!

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.



The screenshot shows a lead profile with the following details:

- Stage C - Cold 6+ Months
- Source Ylopo Seller, 2 years ago
- Agent [REDACTED]
- Lender
- Price \$294,999
- Timeframe
- Tags: 32134, 32617, 34470, 34471, 34472, 34473, 34475, 34476, 34479, 34480, 34481, 34482, ANTHONY, I_NEED_TO_SELL_BEFORE_I_CANBUY, my_tag_website, NTEXT, Ocala, preapproved_for_loan=Yes, RETURNED, SALT SPRINGS, sell_before_buy=Yes, SELLER, TEST_YURIIL LEAD_TAG_1, timeline=over 6 months, Y_HOME_3_VIEW, YLOPO_FACEBOOK, YPRIORITY

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

 A [REDACTED]

[View 1 completed task](#)

Some Essential Tags to Look Out For

Y_PRIORITY

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



Let's Create Smart Lists

Here are some of our recommended ones

1 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

is empty

Tags exclude any of: Import

- are not empty
- include any
- exclude any

Import

are empty

Stage includes any of: Lead

- include
- exclude

Lead

exclude

Created less than 10 days ago

- was less than
- was more than

10 days ago

was empty

2 Important

Priority leads

Add a filter

Last Communication more than...

- is not empty
- was less than
- was more than

1 days ago

is empty

Tags include any of: Y_PRIORITY...

- are not empty
- include any

Y_PRIORITY

HANDRAISER

Y_SELLER_REPORT_ENGAGE

Y_SELLER_REPORT_VIEWED

CALL_NOW=YES

exclude any

are empty

Stage includes any of: Lead

- include
- exclude

Lead

exclude

3 AI Priority

Add a filter

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
- exclude

Lead

exclude

Last Communication more than...

- is not empty
- was less than
- was more than

1 days ago

is empty

The **Response Time** Reality

Priority Leads: Respond within 1 hour

Hot Activity: Same day response

Best Practice: Call, don't just text

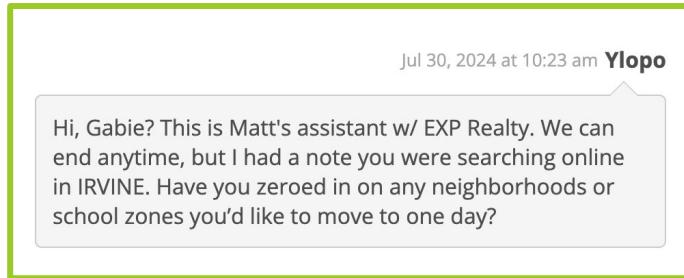
Success Metric: 80% same-day response rate

*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



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

Lead Message Inbox (23 New)

Oct 4, 2024 at 5:20 pm **Ylopo**

Hope this message finds you well, Jesus! I am Matt's assistant. I know Matt tried to reach out but I wanted to also follow up to nail down your wish list for a property? Do you prefer a house or a condo? Also, we can end these messages anytime.

Oct 4, 2024 at 5:59 pm **Ylopo**

Let me know

Enter a message for the lead Send Send

Example 2
Lead asking specific
questions

Lead Message Inbox (11 New)

Jul 8, 2025 at 5:19 pm **Ylopo**

Hi Suzy, it's The Fernandez Group's assistant from EXP Realty. I saw a couple homes that might be perfect for you. Would you like me to send them to suzy.diaz0@gmail.com? Also, we can end these messages anytime.

Suzy Jul 8, 2025 at 5:21 pm

Are they over a Million and they r NOT fixer uppers? In Lake Forest? I need a fixer upper.

Enter a message for the lead Send Send

Example 3
Lead showing buying
signals

Lead Message Inbox (26 New)

Mar 10, 2025 at 12:22 pm **Ylopo**

I'm sorry if I already asked this, but are you looking for an investment property or something to live in? Matt's assistant with EXP Realty. Also, if you're not interested in being texted, just say stop.

Tatiana Mar 10, 2025 at 12:26 pm

Sorry I am very interested I just want to look for a home that fits my boyfriend's and I needs but we won't be moving in soon at all maybe like two years bc of

Enter a message for the lead Send Send

When to Take Over the Conversation

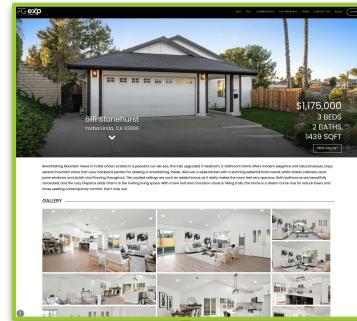
- When the lead triggers a priority alert such as
Y_AI_PRIORITY
AI_NEEDS_FOLLOW_UP
HANDRAISER
AI_VOICE_NEEDS_FOLLOW_UP
CALL_NOW=YES
- When the conversation is going awry, take over and course correct

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

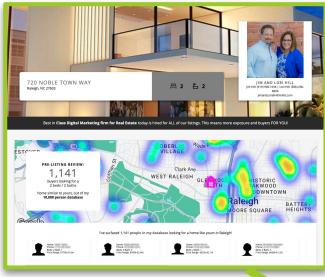
Listing Detail Page



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

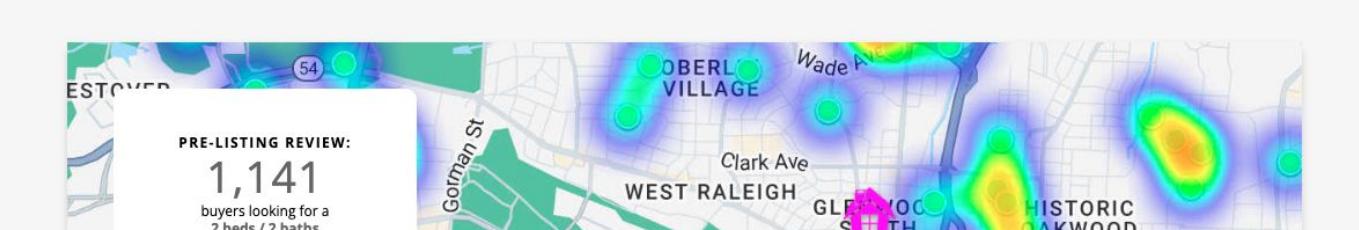


720 NOBLE TOWN WAY
Raleigh, NC 27603

2 2

JIM AND LORI HILL
Jim Hill: (919) 906-1636 | Lori Hill: (586) 260-8609
JimandLori@HillinHills.com

Best in Class Digital Marketing firm for Real Estate today is hired for ALL of our listings. This means more exposure and buyers FOR YOU!



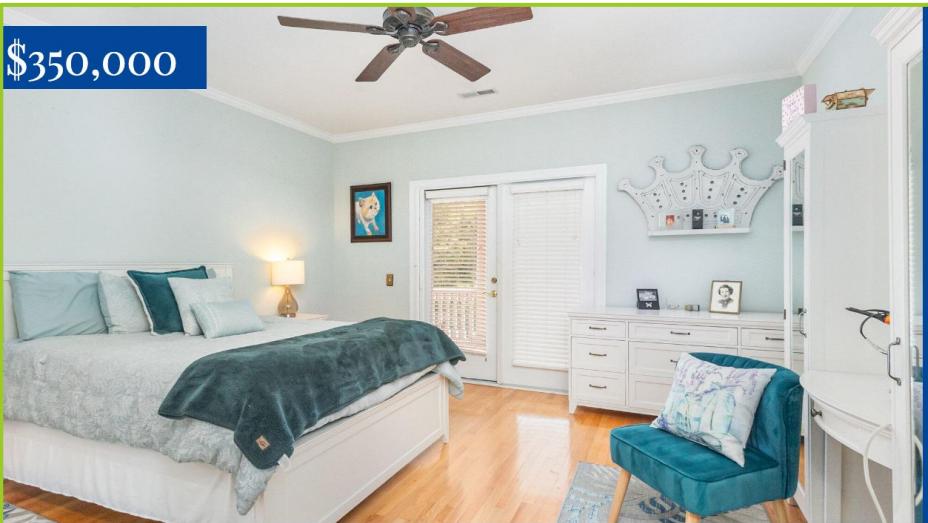
ESTOVER 54

PRE-LISTING REVIEW:
1,141 buyers looking for a 2 beds / 2 baths

Gorman St Oberlin Village Wade Ave Clark Ave WEST RALEIGH Glenwood South HISTORIC Oakwood

Open House Tool Demo

\$350,000



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

Open House Sign In
Touchless open house registration



Having trouble scanning the QR code?
[Sign in here](#)

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

ylopo

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

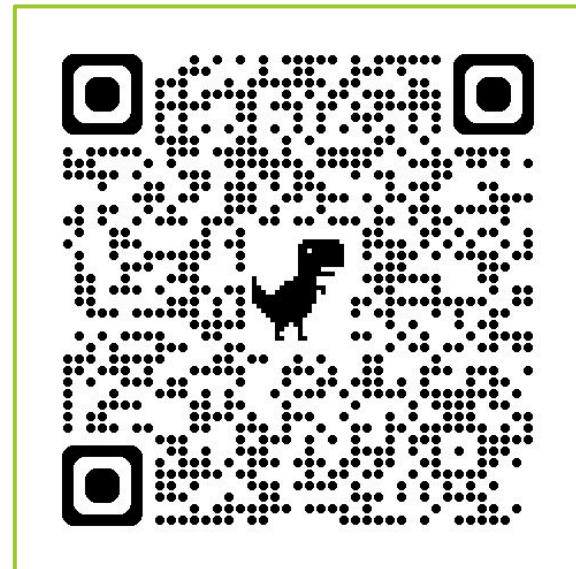


HOST
Matt Croteau
Ylopo Coach

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

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

LEAD INFORMATION

First Name: Test

Last Name: testtt

Email: test@email2.com

Phone: +12012252120

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

Training

AVG PRICE



Ylopo Support Center

Home Ylopo Services Moneymaking Tools Account Changes

Ylopo Training Newsletter Contact Us

Ylopo Training Upcoming Events Access Ylopo Help Center Support Requested Ylopo Best Practices Ylopo Coach Connect Go Live Bootcamp AIQ Dailys 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 latest insights and guidance from our expert trainers and coaches!

GO LIVE BOOTCAMP

This learning is designed for new Ylopo clients. It's a great way to get up to speed on Ylopo's features and how to use them to their full potential.

COACHES OFFICE HOURS

Get ready for an exciting hour! Each Month, Ylopo's resident coaches will share their best practices, strategies, and hacks. Participants will share their success stories and advice, and build community with each other.

Realtors-in-Residence Office Hours

Every Wednesday, our amazing Ylopo Realtors-in-Residence join Office Hours to do what they do best: inspire and educate the Ylopo community. This is a great opportunity to get hands-on with these icons of the industry and pick their brains on everything real estate.

Lead Import Mastery

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.

On-Demand Training

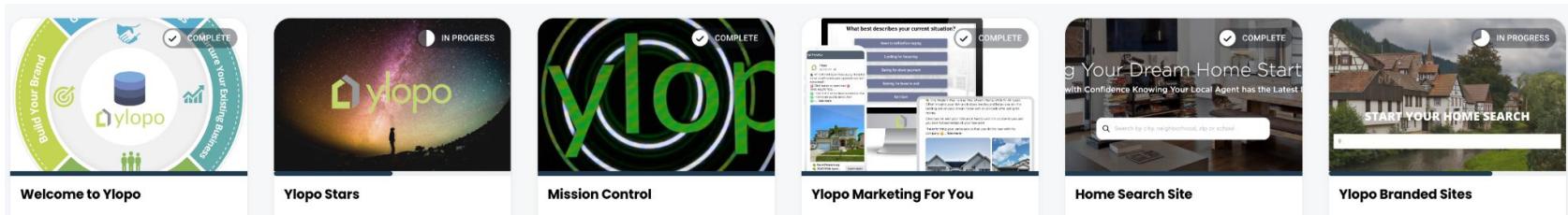
Learn at your own pace, at your own time. We offer free online courses that cover the basics and more. Click on the images to enroll.

Ylopo New User Training

AI Voice 100: Get to Know AI Voice

Buyer Agent Commission Mastery

Online Training



Welcome to Ylopo

Ylopo Stars

Mission Control

Ylopo Marketing For You

Home Search Site

Ylopo Branded Sites

Live Training



Stars Crash Course
Hosted weekly on Tuesdays at 1 pm PST

COACHES OFFICE HOURS
Learn from the experts!

Day	Time	Coaches
Monday	1pm PST / 4pm EST	Chris Phares (Year Coach), Matt Collier (Year Coach), Jim Hill (Year Coach), Marissa Canario (Year Coach)
Tuesday	1pm PST / 4pm EST	Chris Phares (Year Coach), Matt Collier (Year Coach), Jim Hill (Year Coach), Marissa Canario (Year Coach)
Wednesday	1pm PST / 4pm EST	Chris Phares (Year Coach), Matt Collier (Year Coach), Jim Hill (Year Coach), Marissa Canario (Year Coach)

Ylopo Support Center



SUPPORT CENTER

Implementation Tools

Ylopo Success Community

Make Account Changes

AI Voice & AI Test

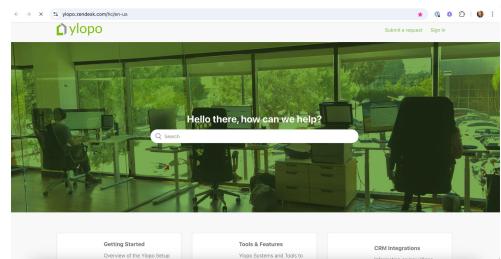
Training & Coaching

MaverickRE

LEAD CONVERSION

Routine Overview: Ylopo Seller 2.0 Seller Report Engagement

Knowledge Base



Hello there, how can we help?

Getting Started

Tools & Features

CRM Integrations

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