



New Client Bootcamp



New Ylopo Client Training Guide

Self Paced Training



Welcome to Ylopo



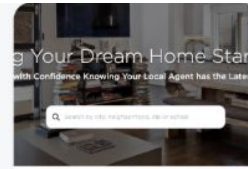
Ylopo Stars



Mission Control



Ylopo Marketing For You



Home Search Site



Ylopo Branded Sites



Ylopo & Lofty (formerly Chime)

Live Training



Implementation:
License Launch, CRM + Ylopo
Integration



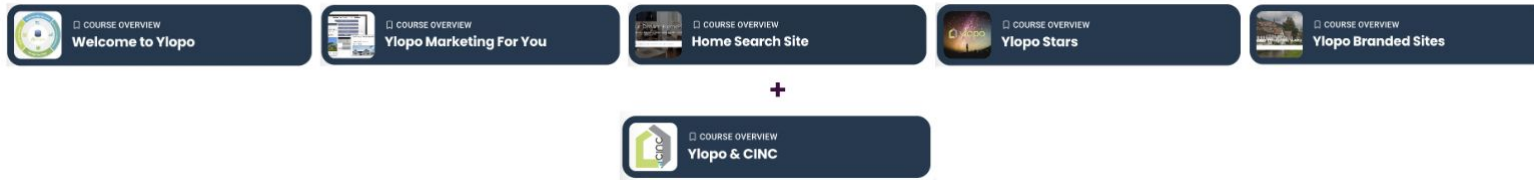
Onboarding:
CRM + Ylopo, Ylopo Stars



Onboarding:
Lead conversion

New Ylopo **Agent** Training Guide

Self Paced New User Training



Live Training



Getting started with Ylopo



Engage and nurture database using Stars



Lead Conversion

Graduation to Onboarding Phase (60 days)

Onboarding Kickoff Call: Launching Your Growth

- Your Vision, Your Goals
- Building the Foundation
- AI as Your Co-Pilot
- Defining Your Stages & Processes

Onboarding 2: Powering Your Playbook

- Stars to engage
- Seller Suite
- Database Imports
- Agent Transitions Made Simple

Onboarding 3: Maximizing Your Toolkit

- Agent Power Tools
- AI Performance Review
- Support at Your Fingertips
- Optimization

Please attend these meeting for optimal account set up!

AGENDA

01

PART 1

- CRM, Agent and Ylopo Role in Successful Lead Conversion
- Ylopo Stars + CRM Integration Review
- Ylopo Notifications
- Best Practices for Organizing CRM for Agent Follow Up

01

Q&A

Break

02

PART 2

- In depth review of Ylopo Stars

02

Q&A

End

Building a Successful CRM database to nurture and convert

CRM

Where you manage your leads
day-by-day



- Your CRM receives, routes and helps organize your leads
- Create smart lists or smart filters
- Run action plans and automations
- Centralize your communication with your leads and clients here

Agent

Manages the relationship to
turn prospects into Clients



- Prospects
- Qualifies
- Advises
- Provides value
- Drives Conversion
- Builds & Nurtures Relationships
- Works leads in CRM

Ylopo

Supercharge Your Real Estate
Business with Smart Lead
Nurturing and Conversion Tools



- Lead Generation
- Remarketing
- AI Assistants
- Home Search Site, Branded Site
- Agent tools
- Training & Coaching



Ylopo + CRM Integration Review

Visit our Ylopo Support Center for more information on the
Ylopo + CRM integration

Ylopo + CRM Integration

Ylopo



CRM



- ❑ Online Lead Generation
- ❑ AI Text Assistant
- ❑ AI Voice Assistant
- ❑ Social Media Retargeting
- ❑ IDX Home Search Site
- ❑ Stars: Nurture tools
- ❑ Branded site: Conversion Tools
- ❑ Priority Notification System
- ❑ Training and Coaching on Ylopo tools and lead conversion

- ❑ Leads are delivered, routed
- ❑ Create organized workflows and follow up lists for prospecting and nurturing
- ❑ Leads and contacts worked by agents - calls, texts, emails logged
- ❑ Database nurtured by campaigns
- ❑ Reporting to track deals
- ❑ Automations for campaigns and repetitive activity
- ❑ CRM Training

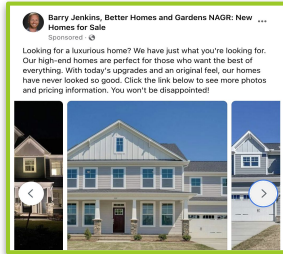
Complete your online training to learn about your specific CRM's integration with Ylopo

[Visit our Help Center for more articles on the CRM + Ylopo integration](#)

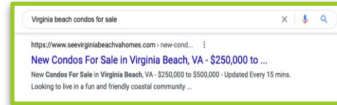
CRM + Ylopo (Stars): Sources

**Ylopo
Lead
Source:**

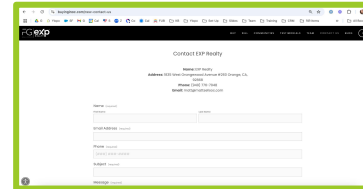
**Home Search Site:
organic, Facebook**



**Home Search
Site: Google
Ads/PPC**



**Branded Site:
Organic, Branded
Sites Tools Page
Tools**



**Branded Site Open
House Tool**



**Ylopo
Source
Name
in FUB:**

- Ylopo Buyers
- Ylopo Sellers
- Direct Connect FB

- Ylopo Adwords
- Direct Connect PPC
- Ylopo LSA

- Branded Website

- Open House (Ylopo)

CRM + Ylopo (Stars): Sources

The screenshot shows the CRM Admin interface. The top navigation bar includes tabs for People, Inbox, Tasks, Calendar, Deals, Reporting, and Admin (highlighted with a green box). Below the navigation bar, the 'Lead Flow' tab is selected and highlighted with a green box. The main content area displays a list of lead sources, with the first three items highlighted by a green box:

- Ylopo Seller** • Sellers • Ge Juefeng (API)
Last lead • [Ken Mackey](#) • 15 hours ago • 1,962 leads
⚙️ Advanced Settings • (4) 🗑️ Archive
- Ylopo** • Buyers • Ge Juefeng (API)
Last lead • [Julie TagPonds](#) • 18 hours ago • 11,489 leads
⚙️ Advanced Settings 🗑️ Archive
- Branded Website** • Buyers • Ge Juefeng (API)
Last lead • [Jackson Core](#) • 3 days ago • 2,283 leads
⚙️ Advanced Settings 🗑️ Archive

To the right of the sources list, there are settings for each source, including Distribution, Lender, and Action Plan. A green callout box with the text "New Ylopo Lead Sources" and an arrow points to the sources list. The top right of the interface includes a search bar and various notification icons.

FUB users: Ylopo will only set up lead distribution for AI Voice eligible lead sources based on your AI Voice set up.

CRM + Ylopo (Stars): Custom Field

The screenshot displays a CRM interface with a lead profile for Vanessa. The left sidebar shows the lead's details, including source, agent, price, and tags. A green callout box labeled "Link to Stars Profile" points to a "Custom Fields" section at the bottom left, which contains a "Ylopo Stars Link" with the URL <https://stars.ylopo.com/lead-detail/5329a519-1b77...>. The main content area shows a conversation history with Matt Croteau, including a voicemail and a text message. The right sidebar shows the lead's activity, tasks, and appointments.

Vanessa
Last Communication 16 hours ago

Create Note Send Email Messages Log Call

Add notes or type @name to notify

Create Note

Background
Add background

Details

Stage Lead

Source Ylopo Adwords, 2 days ago

Agent Shark Tank (Matt Croteau)

Lender

Price \$465,000

Tags 92708 x appinvt x BUYER x

do_you_own_a_home=No x DYNAMIC_REG_ADDRESS x

Fountain Valley x Lead Day15-Audit x PPC_GEO x

preapproved_for_loan=No x self_before_buy=No x

timeline=within 90 days x VOICEMAIL x

YLOPO_ADWORDS x YLOPO_AI_VOICE x +

Custom Fields

--IMPORTANT--

Ylopo Stars Link <https://stars.ylopo.com/lead-detail/5329a519-1b77...>

Link to Stars Profile

Matt Croteau > Vanessa
Sep 18

Ylopo AI Voice
Voicemail
18/24 03:26 PM PDT

Matt Croteau > Vanessa
Sep 18 via action plan
Do you have an opinion on this?

Hey Vanessa, Did you see my previous email? One of the questions I wanted to ask you was if anyone

View action plan email

Ylopo > Vanessa
Sep 18
Raiya Conversation

Person 8 of 54

Activity

MARKETING SOURCE

AdWords

AT A GLANCE

465K 1 572sf 1

92708

View on Ylopo Adwords

Tasks

No upcoming tasks

Appointments

Ylopo AI

YLOPO AI TEXT

Ylopo AI is paused

Resume

Drip and behavioral texts are enabled

Stop

YLOPO AI VOICE

Ylopo AI Voice is calling lead

Last Call 09/18/2024

Outcome Voicemail

Agents can access Ylopo Stars via Stars Link to manage Ylopo tools

CRM + Ylopo (Stars): Custom Field

The image displays two overlapping screenshots. The background screenshot shows a CRM interface with a lead profile for 'Vanessa'. The 'Details' section lists various attributes: Stage (Lead), Source (Ylopo Adwords, 2 days ago), Agent (Shark Tank 16 (Matt Croteau)), Lender, Price (\$465,000), and Tags (92708, appropriate, DYNAMIC_REG_ADDRESS, Fountain Valley, Lead Day 15-Audit, PPC_GEO, preapproved_for_loan-No, sell_before_buy-No, timeline-within 90 days, VOICEMAIL, YLOPO_ADWORDS, YLOPO_AI_VOICE). A green box highlights the 'Custom Fields' section, which contains an 'IMPORTANT-' entry and a 'Ylopo Stars Link' with the URL 'https://stars.ylopo.com/lead-detail/5329a519-1b76-437a-b803-bf27be464438'. A green arrow points from this link to the foreground screenshot.

The foreground screenshot shows the 'stars.ylopo.com/lead-detail/5329a519-1b76-437a-b803-bf27be464438' page. It features a 'LEAD INFORMATION' sidebar with fields for First Name (Vanessa), Last Name, Email, and Created (9/17/24 5:11pm CDT). The main content area includes four circular metrics: AVG PRICE, LAST VISIT (2 days ago), LISTINGS VIEWED (0), and TOTAL VISITS (1). Below these are sections for 'Lead Message Inbox (2 New)', 'Agent Toolkit' (with buttons for 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, Drip and behavioral texts are enabled, and Opt lead OUT of all listing alerts), and 'Saved Search & Listing Alerts'. A 'Live Chat' button is in the bottom right corner.

Stars is Ylopo's database marketing tool that integrates with your CRM, giving you a powerful way to engage, nurture and track home buyer and seller activity from your new leads to past clients.

CRM + Ylopo (Stars): Stage

The screenshot displays a CRM interface with a lead profile for Vanessa. The interface includes a top navigation bar with options like People, Inbox, Tasks, Calendar, Deals, Reporting, and Admin. The lead profile shows contact information, a background image, and a details section. A green box labeled "Stage" points to the "Stage Lead" section in the details panel. The details panel lists various attributes such as Source (Ylopo Adwords), Agent (Shark Tank), Lender, Price (\$465,000), and Tags (92708, appinve, BUYER, etc.). The main communication area shows a conversation with Matt Croteau, including a call outcome and a message about an action plan. The right sidebar displays activity, tasks, appointments, and Ylopo AI settings.

Stage

Details

Stage Lead

Source Ylopo Adwords, 2 days ago

Agent Shark Tank (Matt Croteau)

Lender

Price \$465,000

Tags 92708 X appinve X BUYER X

do_you_own_a_home-No X DYNAMIC_REG_ADDRESS X

Fountain Valley X Lead-Day15-Audit X PPC_GEO X

preapproved_for_loan-No X sell_before_buy-No X

timeline-within 90 days X VOICEMAIL X

YLOPO_ADWORDS X YLOPO_AL_VOICE X

Custom Fields

--IMPORTANT--

Ylopo Stars Link <https://stars.ylopo.com/lead-detail/5329a519-1b7...>

Activity

MARKETING SOURCE

AdWords

AT A GLANCE

465K 1 572sf 1

92708

View on Ylopo Adwords

Tasks

No upcoming tasks

Appointments

Ylopo AI

YLOPO AI TEXT

Ylopo AI is paused

Drip and behavioral texts are enabled

YLOPO AI VOICE

Ylopo AI Voice is calling lead

Last Call 09/18/2024

Outcome Voicemail

Communication Log

Matt Croteau > Vanessa
Sep 18

Call outcome from AI Voice
Call Disposition: Voicemail
Time of Call: 09/18/24 03:26 PM PDT

Matt Croteau > Vanessa
Sep 18 via action plan

Do you have an opinion on this?

Hey Vanessa, Did you see my previous email? One of the questions I wanted to ask you was if anyone

[View action plan email](#)

Ylopo > Vanessa
Sep 18

[Raiya Conversation](#)

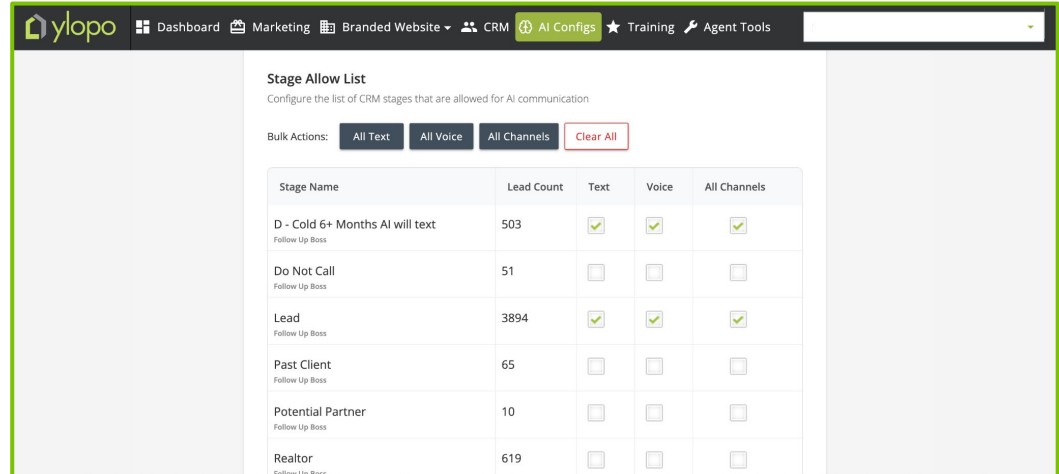
AI blocked or allowed

CRM + Ylopo (Stars): Stage

AI

Recommended blocked stages

- Appointment Set
- Hot
- Active
- Past Clients
- Closed



Ylopo Dashboard Marketing Branded Website CRM AI Configs Training Agent Tools

Stage Allow List

Configure the list of CRM stages that are allowed for AI communication

Bulk Actions: All Text All Voice All Channels **Clear All**

Stage Name	Lead Count	Text	Voice	All Channels
D - Cold 6+ Months AI will text Follow Up Boss	503	☒	☒	☒
Do Not Call Follow Up Boss	51	☐	☐	☐
Lead Follow Up Boss	3894	☒	☒	☒
Past Client Follow Up Boss	65	☐	☐	☐
Potential Partner Follow Up Boss	10	☐	☐	☐
Realtor Follow Up Boss	619	☐	☐	☐

- Let your Implementation Specialist know if you need to review or make changes before launch,
- You'll be able to adjust your stage settings in Mission Control once live

CRM + Ylopo (Stars): Assigned Agent

The screenshot displays a CRM interface with a top navigation bar including 'People', 'Inbox', 'Tasks', 'Calendar', 'Deals', 'Reporting', and 'Admin'. A search bar is located on the right. The main content area is divided into three columns:

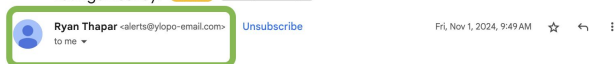
- Left Column (Lead Profile):**
 - Header:** Vanessa, Last Communication 5 days ago.
 - Background:** Add background.
 - Details:**
 - Stage:** Lead
 - Source:** Ylopo Adwords, 2 months ago
 - Agent:** Me (highlighted with a green box and a green arrow from the 'Assigned Agent' label)
 - Lender:**
 - Price:** \$465,000
 - Timeframe:**
 - Tags:** 92708, appinville, BUYER
 - Additional Info:** do_you_own_a_home=No
- Middle Column (Communication Log):**
 - Actions:** Create Note, Send Email, Messages, Log Call.
 - Note Field:** Add notes or type @name to notify.
 - Activity List:**
 - Matt Croteau > Vanessa** (Nov 2): Call outcome from AI Voice, Call Disposition: Voicemail, Time of Call: 11/02/24 09:14 AM PDT.
 - Matt Croteau > Vanessa** (Oct 31 via automation):
- Right Column (Summary & Tasks):**
 - Activity:** MARKETING SOURCE: AdWords. AT A GLANCE: 459K, 1, 572sf, 1, 92708. View on Ylopo Adwords.
 - Tasks:** No upcoming tasks.
 - Appointments:** No upcoming appointments.
 - Ylopo AI:** YLOPO AI TEXT.

Ylopo Listing and Seller Alerts, Presented by section on Home Search Site

CRM + Ylopo (Stars): Assigned Agent

Listing Alerts/Seller Alerts

Your Home Value Report has been created, Gabiel! Also, there are 5 active listings nearby! [External](#) [New Agent Training](#) x



Click to unlock your estimated home value



Ylopo Notifications to Agent

YLOPO URGENT PRIORITY LEAD: Miski Abdala requested an in-person tour of 3615 Zinnia Lane N, Plymouth, MN [View](#)

[+ Summarize this email](#)

notification@ylopo.com to me • 11:18 AM (5 hours ago) ☆

PRIORITY LEAD ALERT: Miski Abdala

Phone Number: (763) 300-9297

Miski Abdala REQUESTED AN IN-PERSON TOUR for 3615 Zinnia Lane N, Plymouth, MN.

View in [Ylopo Stars](#)

Recommended actions:

1. Call/text the lead at (763) 300-9297 and ask them when they are normally free to look at 3615 Zinnia Lane N, Plymouth, MN
2. Also let them know you think there are some more in the area they might like too.
3. Connect with them!
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!

(Optional) AI Text Assistant

Dec 10, 2024 at 12:14 am **Ylopo**

I just checked our database again and now we have 1 home shoppers searching for a home like yours. Isn't this fascinating **Ryan's assistant** w/ The Thapar Team.

(Optional) Agent Home Search Site

The screenshot shows a real estate listing for 85 Wood Street Th5 in Toronto. The listing is for a Condo Townhouse with 4 bedrooms, 3 bathrooms, and 0 lot sqft. The price is \$1,395,000. The listing is marked as 'Active'. The agent is Ryan Thapar, Team Leader, with contact information (5014012) and (647) 691-8644. The listing is presented by The Thapar Team, REALTOR®, with contact information (416) 562-5656. The listing is for a Condo Townhouse with 4 bedrooms, 3 bathrooms, and 0 lot sqft. The listing is marked as 'Active'. The agent is Ryan Thapar, Team Leader, with contact information (5014012) and (647) 691-8644. The listing is presented by The Thapar Team, REALTOR®, with contact information (416) 562-5656.

CRM + Ylopo (Stars): Lead Activity

The screenshot displays a CRM interface with a dark top navigation bar containing icons for People, Inbox, Tasks, Calendar, Deals, Reporting, and Admin, along with a search bar. The main content area is divided into three columns. The left column shows a profile for 'Vanessa' with a 'Last Communication 18 hours ago' status, contact icons, and a 'Background' section. The middle column features a 'Create Note' section with a text input field and a 'Create Note' button. Below this is a list of activity items, with the first item highlighted in a green box. The right column contains an 'Activity' panel, a 'Tasks' section, and a 'Ylopo AI' section.

Lead Activity

Registration from Ylopo page
...k3gSvGBKbLgOOEDxy7ZiiYXL3NY78v46RJxpfrBy51EqAahoCOR
QQAaV_D_BwE
Sep 17
17200 Newhope Street 123, Fountain Valley, CA 92708 - view map
MLS#OC24177900
via: Ylopo Adwords • Buyers • Matt Croteau (API)
Ylopo ID: 55665438
Lead Type: BUYER
Ad Platform: YLOPO_ADWORDS

Activity
MARKETING SOURCE
AdWords
AT A GLANCE
465K 1 572sf 1
92708
View on Ylopo Adwords

Tasks
No upcoming tasks

Appointments

Ylopo AI
YLOPO AI TEXT
Ylopo AI is paused
Drip and behavioral texts are enabled

Activity from engagement with Ylopo ads, AI, websites and tools



AI Voice

The Funderbox Group - EXP Realty

Sponsored ·

- 📌 **Is selling your home for cash has never been easier!** With our turnkey process, you'll receive a fair cash offer quickly.
- 📌 **We understand the stress of waiting for potential buyers or dealing with uncertain valuations.** Our team ensures transparency and authority in every step of the way. From initial offer to final transaction, we prioritize your convenience and satisfaction.
- 📌 **Experience the relief of selling your home hassle-free and get the cash you need fast. Don't wait – See more**

Registration from Yippo page

1818DyallMnNYVIEBqQd3wex7zS9LxSGtTHviorCiQdO
GmQdJwE
Apr 13

595 S Avenida Ferro, Anaheim Hills, CA 92807 - View map
MLS#PW25073696

via: **Yippo Adwords** • Buyers • Matt Croteau (APR)

Learn more
[search.buyingcash.com](#)

The screenshot displays a real estate application interface. On the left, a sidebar contains navigation options: 'Add Apartments', 'Add Profile', 'Dashboard', 'User Profile', and 'Follow Up Book'. The main content area shows a property listing for 'Apartment' with a price of '\$345,000' and a 'View Info' button. Below the listing, there is a 'Lead Message History' section. On the right, a chat window is open, showing a conversation with 'Yioppo & Lauren Chilo'. The chat history includes a message from the user asking about property preferences and a response from the assistant, 'Hi Lauren! I am Matt's assistant. Matt may have reached out earlier and I wanted to follow up to find out your ideal property preferences so we can send some properties to you. Do you have a preferred location or bed/bath requirement? Also, we can end these messages anytime.'

The screenshot shows a mobile phone screen with a call log entry. The entry is for a call to Matt Croteau on April 10. The call status is 'Call Outcome from AI Voice' and 'Call Disposition: No Answer'. The time of the call is '04/10/25 12:34 PM PDT' and the call type is 'Outbound'. The phone's status bar at the top shows the time as 10:10 and the battery level at 100%.

FGexp Sales

Free Home Listing \$349,000

Listing Office: Coastal Realty Center Inc. Listing Agent: Jenni Rodriguez

25421 Sea Shells, Dana Point, CA \$349,000

Recent Activity

Ylopo Apr 10

Ylopo Links & Activity

User Action: Lead Registered and searched and viewed 1 listings

Main City of Interest: Dana Point, CA

Avg. Price of Homes Viewed: \$349,000

Send push listing: <https://stars.ylopo.com/3mf3RK>

Edit listing alert: <https://stars.ylopo.com/3mf4AJ>

View browsing history: <https://stars.ylopo.com/3mf3RA>

[illegible]

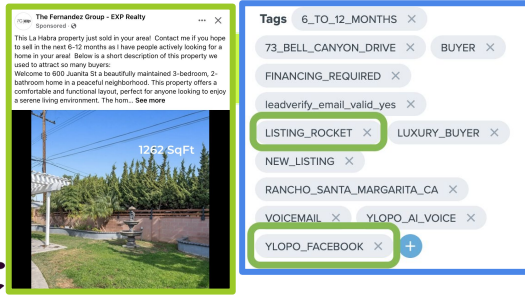
CRM + Ylopo (Stars): Tags

The screenshot displays the Ylopo CRM interface for a lead named Vanessa. A green box highlights the 'Tags' section in the left sidebar, which lists various tags such as '92708', 'appinville', 'BUYER', 'do_you_own_a_home-No', 'DYNAMIC_REG_ADDRESS', 'Fountain Valley', 'GHOST_CALL', 'Lead-Day1-15-Audit', 'PPC_GEO', 'preapproved_for_loan-No', 'sell_before_buy-No', 'timeline-within 90 days', 'VOICEMAIL', 'YLOPO_ADWORDS', and 'YLOPO_AI_VOICE'. A green arrow points from a 'Tags' label to this section. The main content area shows a message history with a message from Matt Croteau to Vanessa dated Sep 22, and an activity feed with a call outcome from AI Voice dated Sep 21. The right sidebar contains sections for 'Activity', 'Tasks', 'Appointments', and 'Ylopo AI'.

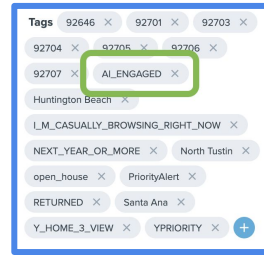
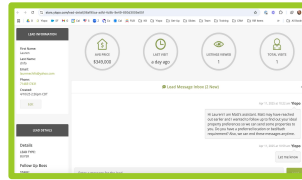
Tags will be utilized to indicate lead activity, AI text, AI Voice dispositions, lead source and more so you can easily filter through your database.

CRM + Ylopo (Stars): Tags

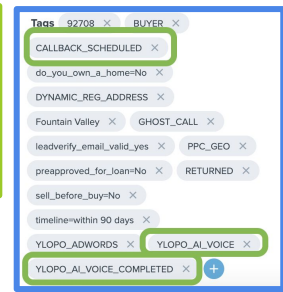
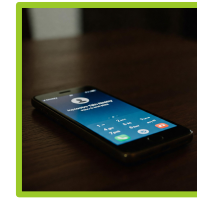
Ad Engagement



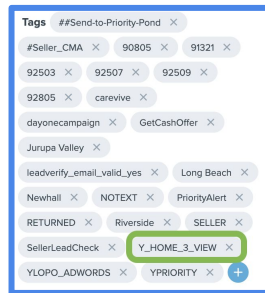
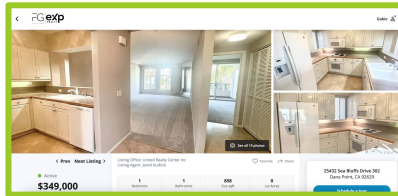
AI Text



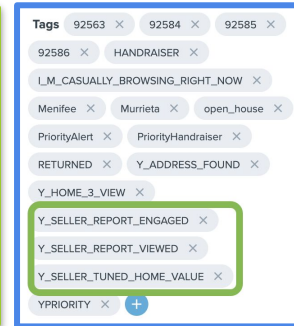
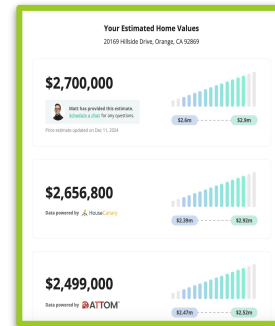
AI Voice



Home Search Site Activity



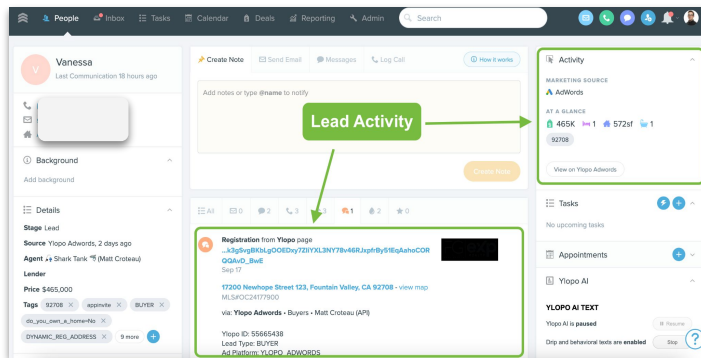
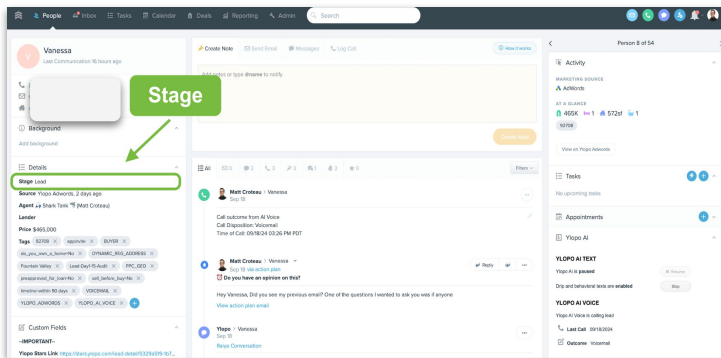
Seller Report & Listing Alerts



CRM + Ylopo (Stars): Integration Review



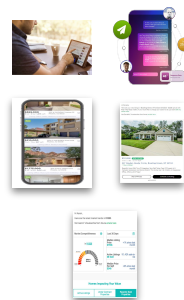
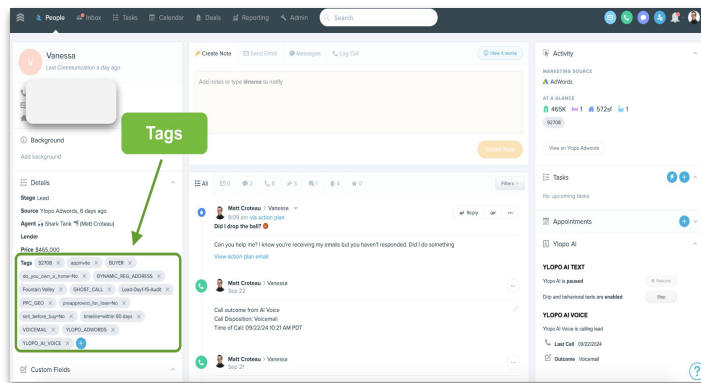
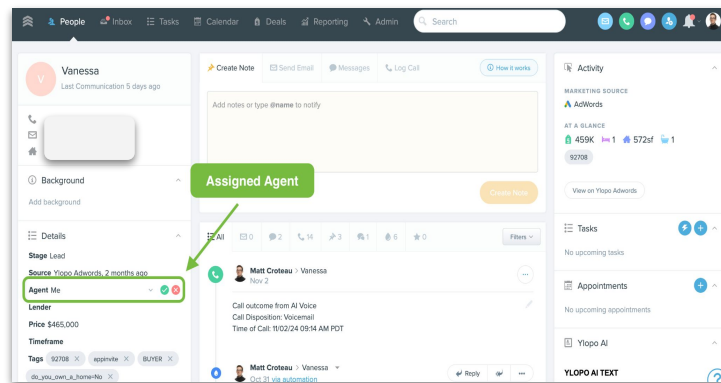
AI blocked or allowed



Activity from engagement with Ylopo ads, AI, websites and tools



Ylopo Listing and Seller Alerts, Presented by section on Home Search Site



Lead sources, registration responses, engagement with Ylopo sites, AI and tools

Complete your online training to learn about your specific CRM's integration with Ylopo

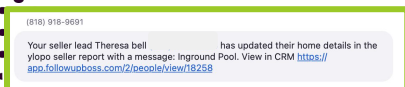


Ylopo Notifications to Agents

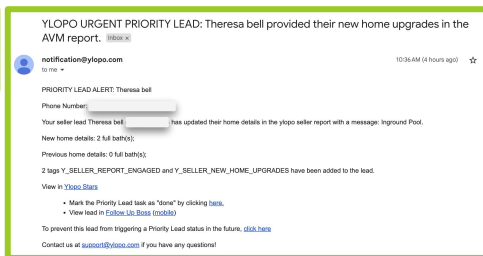
Ylopo Notifications: Priority Notifications

When someone's home search activity really heats up, or they reach out to you for help or more information, we will flag them as a "Priority Lead." These serve as a nudge to follow up and connect with them!

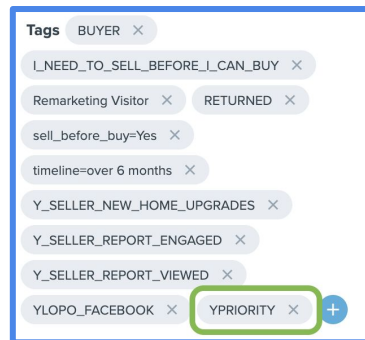
Priority Text sent to agent



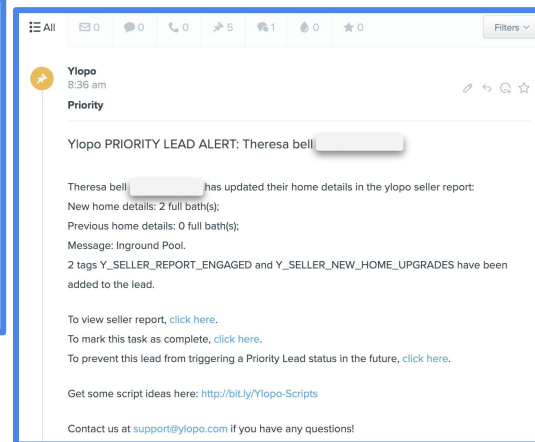
Priority Email sent to agent



YPRIORITY tag added on lead profile



Priority notes added to lead profile in CRM





(424) 276-3699

We've texted Brenda Wheaton for you, and they replied "Hope to really get into searching in about 4 months are so if all works out ...don't want to waste your time...until I know what I can and can't do. I will get in touch. - Am looking at Boones Mill , Roanoke south side not in town, also Rocky Mount .. with 10 to 20 acres and a nice home.. but will get into that more when I know I can really search ." - see full thread: <https://stars.ylopo.com/t/8N7ay>

Ylopo Behavioral Text First Response from Brenda Wheaton

 notification@ylopo.com
10/10/19

We send Brenda Wheaton "Hi, Brenda! This is Local Home Therapist assistant w/Ylopo. If you prefer I do not text you, just reply, share or text a note you are sending online or your search home. Have you entered in on any neighborhoods or school areas you'd like to move to in one day?" on 10/20.

This reply "Ylopo to really get into something about 4 months ago as if it were not... don't want to waste your time... I'll know what I can and can't do. I will get back to you."

You view in [RealEstate](#)

You view in [Video Sales](#)

To send the text, look at [Home Link](#), [Link Share](#)

To send a text back to the behavioral text, [click here](#)

Tags AI_ENGAGED X BUYER X

cash_offer=no X

do_you_own_a_home=Yes X

I_NEED_TO_SELL_BEFORE_I_CAN_BUY X

Brenda Wheaton > Ytopo

Raiya Conversation

Hope to really get into searching in about 4 months are so if all works out ...don't want to waste your time...until I know what I can and can't do. I will get in touch. - Am looking at Boones Mill, Roanoke south side not in town, also Rocky Mount ... with 10' to 20 acres and a nice home, but will get into that more when I know I can really search .



Best Practices Ylopo + CRM

Systemize Your Daily Workflows for Lead Conversion

Ylopo Pro Tip: CRM Best Practices

- Create an SOP to work your database
- Time block to work your call lists, use a desktop/laptop to be efficient
 - Download CRM app for incoming calls and immediate outreaches to important activity
- Log ALL communication to leads in CRM
- Agent should be updating stages
- Add notes in background
- Use Ylopo tools to keep engaging leads
- Be consistent with routine

MORE CALLS = MORE CONVERSATIONS = MORE APPTS = MORE DEALS

Ylopo Best Practice for Daily Lead Conversion

1) NEW

- Created < 10 days ago
- Tag excludes: Import
- Stage includes: Lead
- Last communication > 12 Hours

2) IMPORTANT

- Stage includes: Lead
- Tags include:
YPRIORITY, HANDRAISER, Y_SELLER_REPORT_ENGAGED, Y_SELLER_REPORT_VIEWED, call_now="yes"
- Last Communication > 1 day ago

3) AI Priority -

- Stage includes: Lead
- Tags include:
YLOPO_AI_PRIORITY
- Last Communication > than 1 day ago

4) Recently Active

- Last Visit < 7 Days ago
- Last Communication > than 7 days ago

5) Nurture Priority

- Stage includes: Hot, Warm, and Cold, Past Client (nurture stages)
- Tags include: *YPRIORITY, HANDRAISER, Y_AI_PRIORITY, Y_SELLER_REPORT_VIEWED*
- Last Communication > than 1 days ago

[View the recommended lists here](#)

Ylopo Best Practice for Nurture

1) Hot stages - 1x/wk

- Stage: Includes Hot
- Last communication > 1 week

2) Warm stages - 2x/mo

- Stage: Includes Warm
- Last communication > 14 days

3) Cold stages - 1x/month

- Stage: Includes Cold
- Last communication > 30 days

4) Closed/Past stages - 1x/qtr

- Stage: Includes Past Clients, Closed
- Last communication > 3 months

[View the recommended lists here](#)

Ylopo Additional Smartlists

AI Voice Follow Up -

- Stage includes: Lead
- Tags:
AI_VOICE_NEEDS_FOLLOW_UP
- Last Communication: More than 1 day ago

No Stars Links -

- Ylopo Stars Link is: empty
- Email is: good

Seller Engagement -

- Tags include:
- Y_SELLER_REPORT_VIEWED
- Y_SELLER_REPORT_ENGAGED

- [View our full list of Ylopo Tags to implement in your own smartlists/workflows](#)

Workflows/smartlists should fit your business needs. Meet with our Ylopo Coaches for help seeing what might best fit your needs using Ylopo!

What all of this technology means for you...

Allows you to shape your business and workflow around what is important to you

1

Leads don't "slip through the cracks"

2

Identify and convert high intent buyers and sellers

3

Provide your clients and potential clients with access to valuable information and tools

4

Nurturing for leads and database in any stage

5

AND MORE!



CRM



Agent



Ylopo



CRM + Agent + Ylopo

Maximize lead conversion and boost ROI by building and nurturing a healthy pipeline of deals in your CRM, managed through streamlined organization and automation, consistent branding, and proactive agent follow-up at every stage of the consumer sales journey

QUESTIONS?

This Concludes 1 of 2 Part Ylopo Boot Camp Training

AGENDA

01

PART 1

- Ylopo's role in your business
- Ylopo + CRM Integration Review
- Ylopo Notifications
- Best Practices for Organizing CRM for Agent Follow Up

01

Q&A

Break

02

PART 2

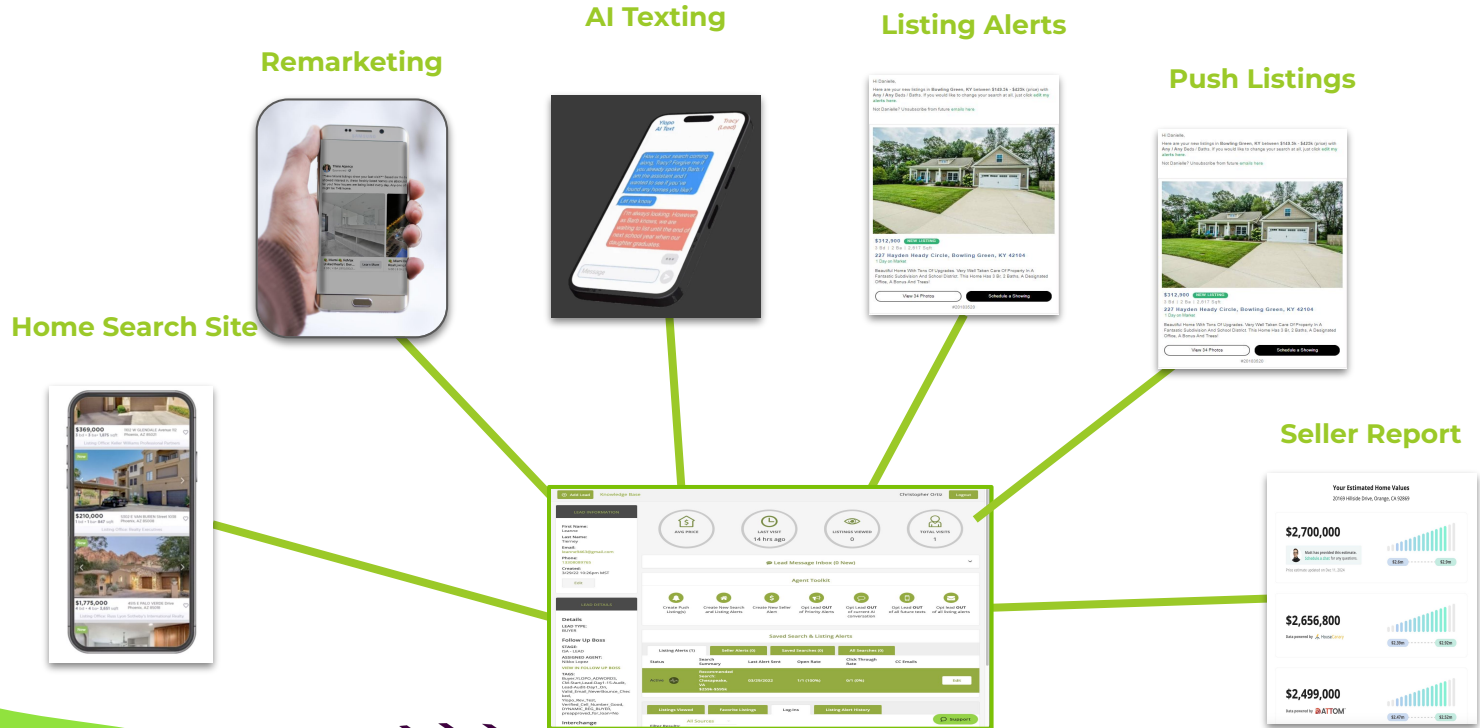
- Using Stars to engage and nurture leads
- Additional Training and Resources

02

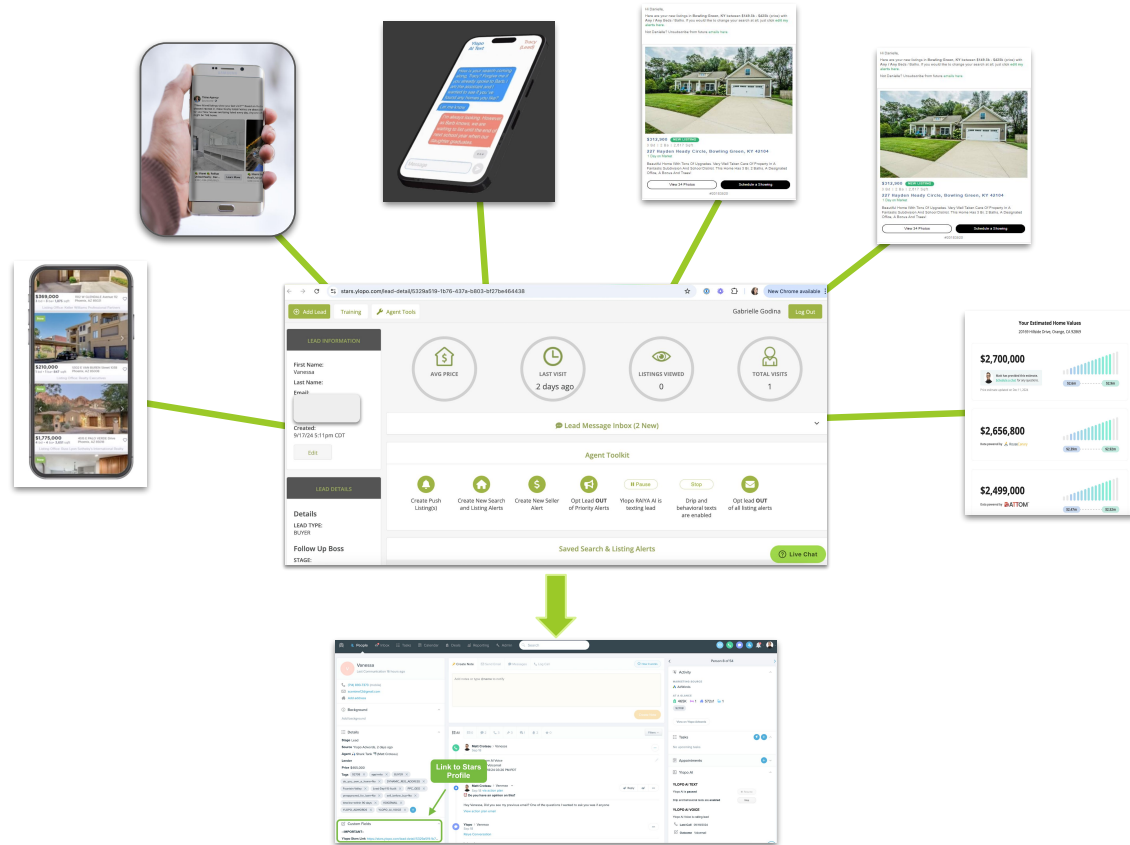
Q&A

End

Utilize Ylopo Stars for Lead Engagement and Nurturing



CRM + Ylopo (Stars): Integration



Stars is Ylopo's database marketing tool that integrates with your CRM, giving you a powerful way to engage, nurture and track home buyer and seller activity from your new leads to past clients.

Accessing Stars

The screenshot displays the Stars application interface. On the left, a sidebar shows a list of leads, with a green box highlighting the 'Custom Fields' section and a green arrow pointing to the 'Link to Stars Profile' button. The main content area shows the lead details for Vanessa, including her first and last names, source, agent, lender, price, and tags. The 'Lead Information' section displays four circular metrics: AVG PRICE, LAST VISIT (2 days ago), LISTINGS VIEWED (0), and TOTAL VISITS (1). The 'Lead Details' section shows the lead type as BUYER and the follow-up boss. The 'Agent Toolkit' section provides various actions like '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', 'Drip and behavioral texts are enabled', and 'Opt lead OUT of all listing alerts'. The 'Saved Search & Listing Alerts' section is also visible at the bottom.

Stars is the control center for a user experience on your home search site. Agents must have a Stars login to access Stars and an Agent subdomain required to be listed on the "Presented by" section on the home search site.

Logging into Stars

Your Ylopo Stars Access Information



Support <support@ylopo.com>
to me ▾



##- Please type your reply above this line -##



Gabrielle Godina (Ylopo)

Aug 17, 2023, 12:46PM PDT

Hi Gabrielle,

Here is your new Stars Username and Password:

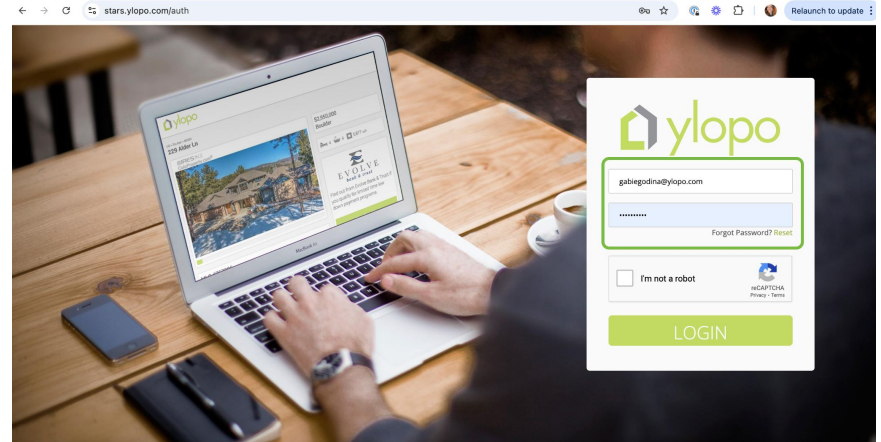
Username: ggodina@ylopo.com

Temporary Password: Ylopo*12

Log in page: <https://stars.ylopo.com/>

Ylopo Stars must be accessed through an individual's lead file in your CRM system. You will be able to access Stars when you receive your first Ylopo lead.

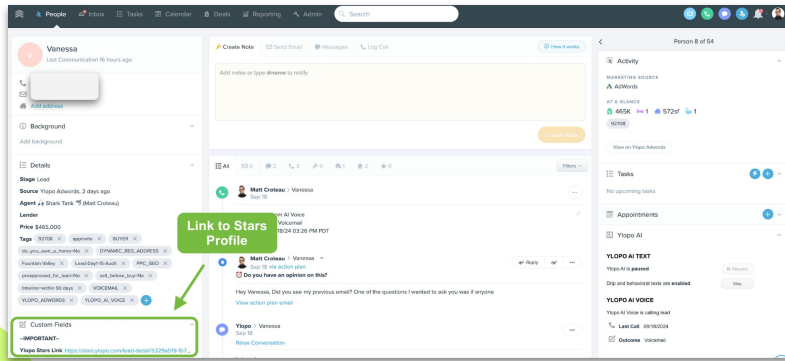
Your Stars login information will be sent to you from Ylopo via email



Access a lead profile in Stars to login or use the link provided. You will always access Stars from a leads Stars link in your CRM

Stars: Manually Add a Lead to Stars

A contact must be in Stars to utilize Ylopo tools like AI texting, listing alerts and remarketing



[Learn More](#)

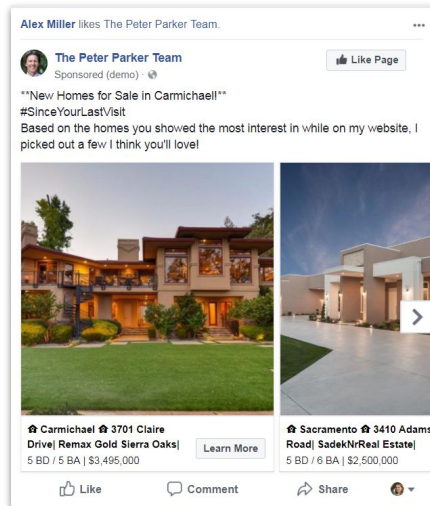
Add a lead via Add Lead button in Stars or visit <https://stars.ylopo.com/lead-detail/add>

A screenshot of the 'Add Lead' form in the Stars application. The form is titled 'New Lead Details' and includes several input fields: 'Enter first name', 'Enter last name', 'enter email' (with a red error message 'Field value must be a valid email.'), and 'enter phone number' (with a red error message 'Field value must be a valid phone number.'). There is also a checkbox for 'Send Welcome Email' and a 'Submit and Save' button at the bottom right. The form is part of a larger interface with a top navigation bar and a sidebar.

Watch Now

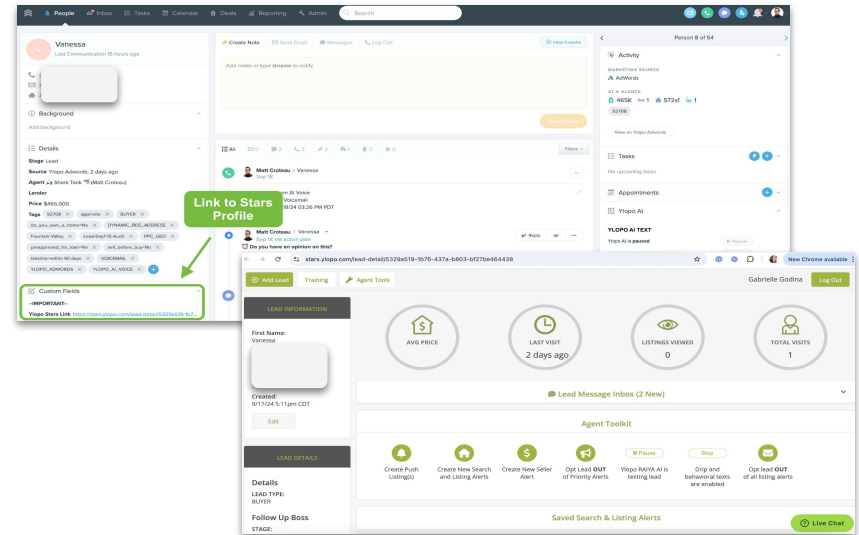
Stars: Remarketing

Build brand awareness by retargeting leads in your database with similarly viewed properties



[Learn More](#)

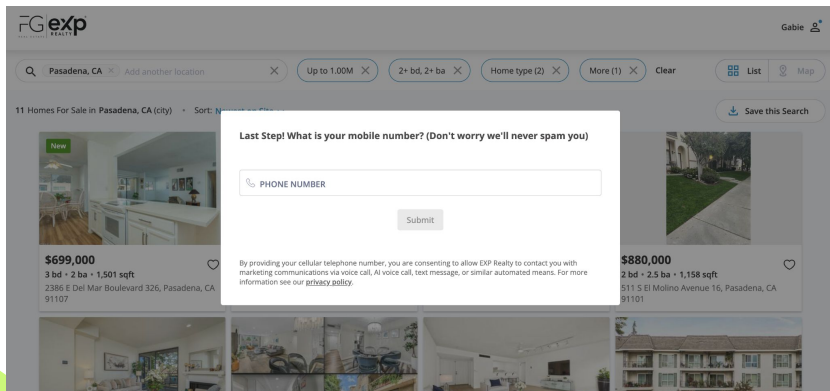
Leads with Stars Profiles/Links are eligible for remarketing.



Watch Now 

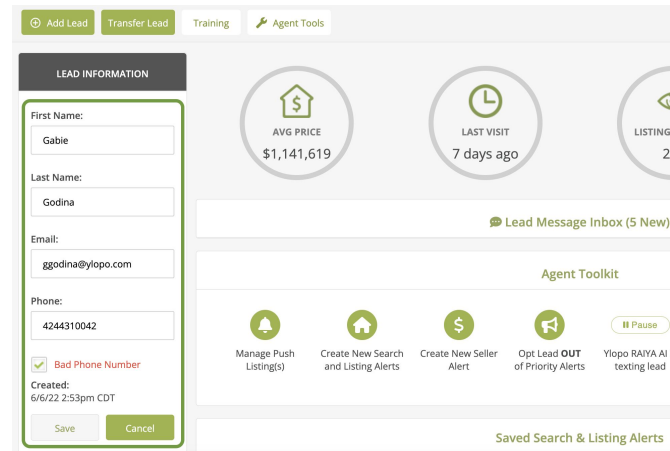
Stars: Lead Information & Bad Number Tool

Manage lead contact info in Stars and utilize the bad number tool to get updated numbers



[Learn More](#)

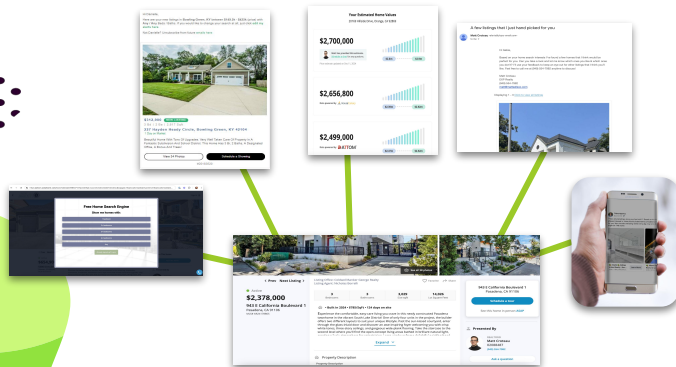
Manage Lead Information in Stars



Watch Now

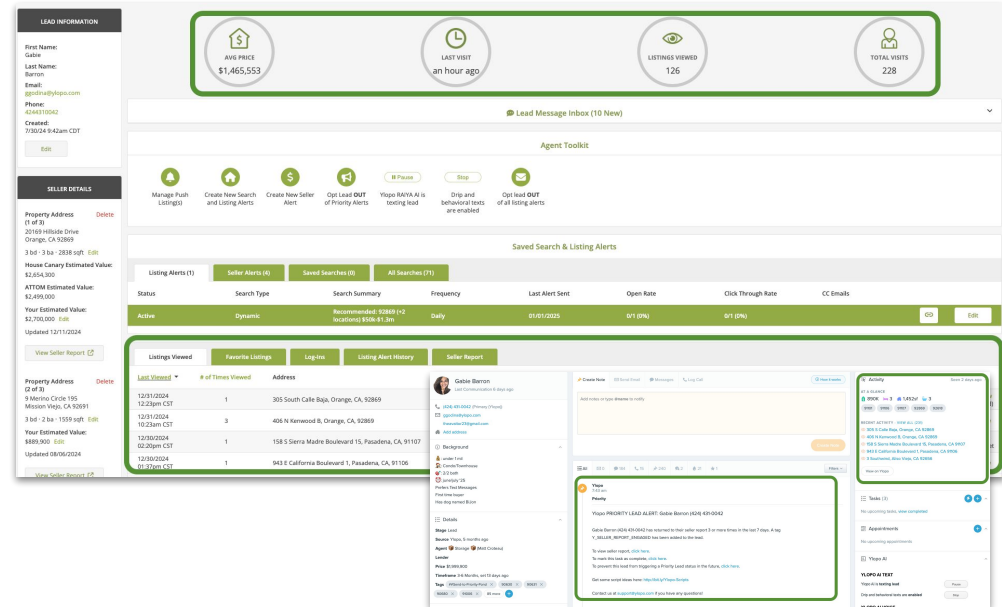
Stars: Home Search Site

Leverage your Ylopo home search site to keep leads seeing your brand while you get alerted of important activity. Users can save, share, request tours and more information via your home search site. Your Home Search Site is connected to your MLS IDX feed.



[Learn More](#)

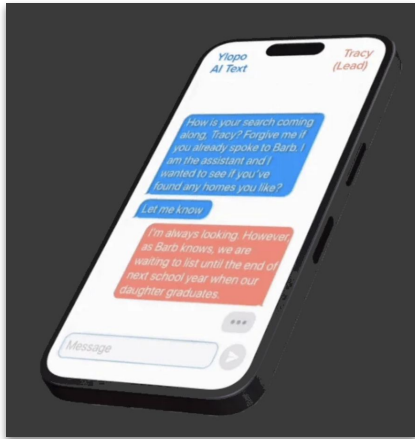
Listing alert, seller alert, AI texting and home search site activity is logged in Stars and added to the leads profile in CRM. You'll be alerted of important activity via Priority alerts.



[Watch Now](#)

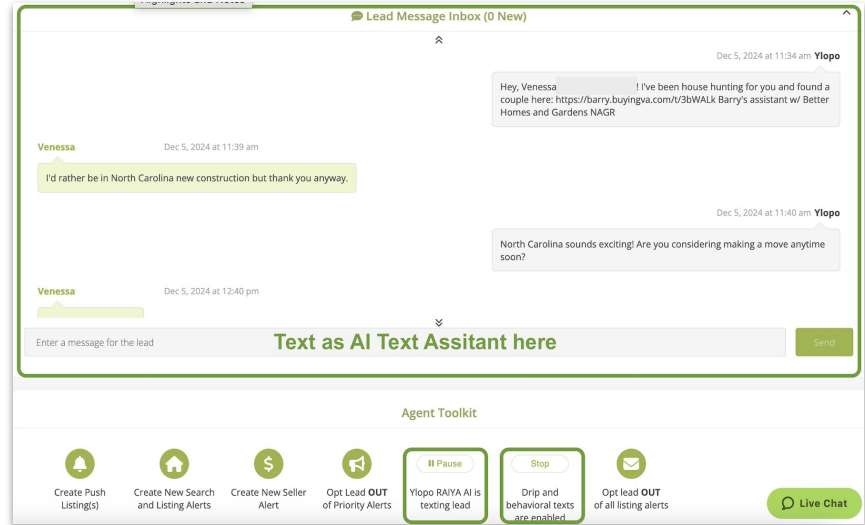
Stars: AI Texting

Leverage your AI text assistant to engage and nurture leads



[Learn more](#)

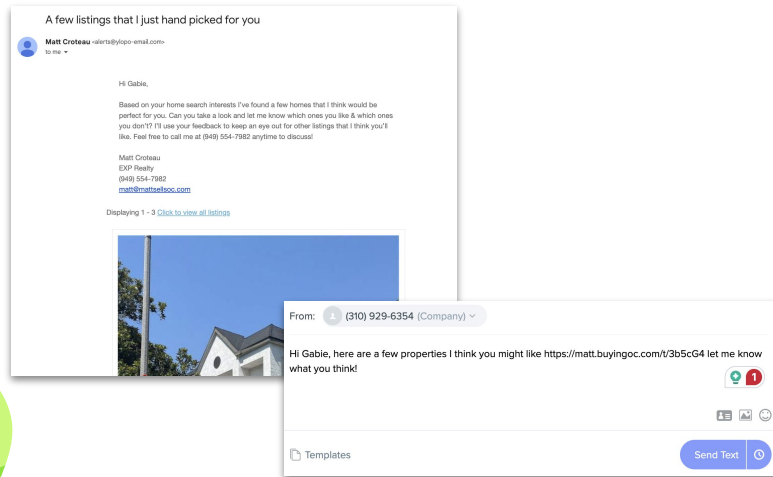
Manage your AI Text Assistant in Stars



Watch Now

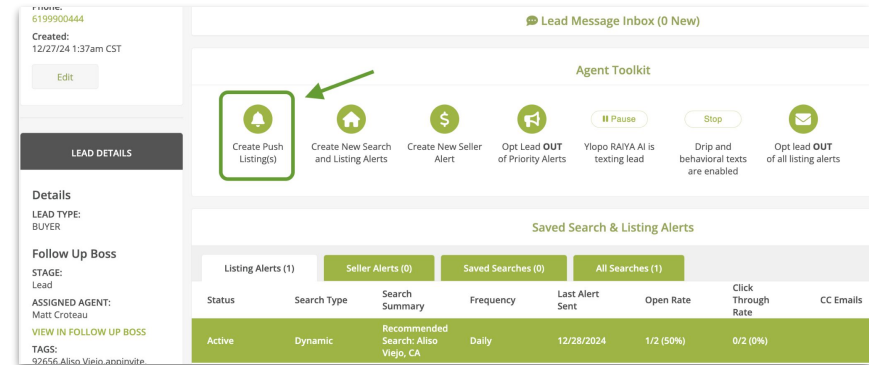
Stars: Push Listings and Push Listing Link

Use Push listings to hand pick properties to send to your leads via email or with a textable link



[Learn More](#)

Create and manage Push Listings with the Push Listing Tool in Stars



Watch Now

Stars: Listing Alerts and Listing Alert Link

Keep your leads engaged on your website with relevant property updates via listing alert and the listing alert link

Hi Danielle,

Here are your new listings in Bowling Green, KY between \$149.5k - \$425k (price) with Any / Any Beds / Baths. If you would like to change your search at all, just click [edit my alerts here](#).

Not Danielle? [Unsubscribe from future emails here](#)



\$312,900 NEW LISTING

3 Bd | 2 Ba | 2,617 Sqft

227 Hayden Heady Circle, Bowling Green, KY 42104

1 Day on Market

Beautiful Home With Tons Of Upgrades. Very Well Taken Care Of Property In A Fantastic Subdivision And School District. This Home Has 3 Br, 2 Baths, A Designated Office, A Bonus And Trees!

[View 34 Photos](#) [Schedule a Showing](#)

#20103620

[Learn more](#)

Manage Listing Alerts in Stars

Agent Toolkit

- 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
- Pause
- Stop
- Drip and behavioral texts are enabled
- Opt lead OUT of all listing alerts

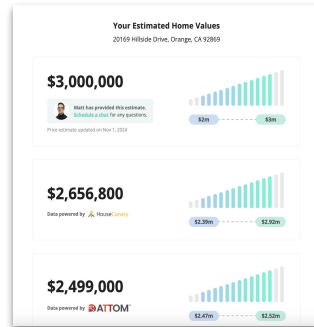
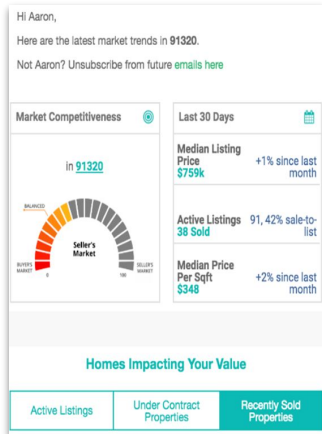
Saved Search & Listing Alerts

Listing Alerts (1)		Seller Alerts (0)		Saved Searches (0)		All Searches (2)	
Status	Search Type	Search Summary	Frequency	Last Alert Sent	Open Rate	Click Through Rate	CC Emails
Active	Dynamic	Recommended Search: Gloucester Point, VA \$674.3k-\$1.1m	Daily	12/09/2024	1/1 (100%)	0/1 (0%)	View Edit

Watch Now 

Stars: Seller Alert and Seller Report

Engage and nurture sellers in your database with local market updates (seller alert) and home equity reports (seller report)



Manage Seller Alerts/Seller Reports in Stars

Agent Toolkit

- 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
- Stop
- Drip and behavioral texts are enabled
- Opt lead OUT of all listing alerts

Saved Search & Listing Alerts

Listing Alerts (1)		Seller Alerts (2)		Saved Searches (0)		All Searches (3)		
Status	Search Type	Search Summary	Email Campaign	Frequency	Last Alert Sent	Open Rate	Click Through Rate	CC Emails
Active	Seller Alert	Seller Alert 21 Nov 2024 (23456): 2432 Sandfiddler Road, Virginia Beach, VA 23456	Ylopo AVM Report	Monthly	11/22/2024	1/1 (100%)	0/1 (0%)	Edit

[Live Chat](#)

Watch Now 

Learn more about [seller alerts](#), [seller report \(US\)](#), [Seller Experience \(Canada\)](#), [Understanding the seller report \(CAN\)](#)

Ylopo Training and Coaching Resources

stars.ylopo.com/lead-detail/a1b0a7c2-232d-463f-9742-8f6c81887f

➕ 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 Managing Tools Account Changes **Ylopo Training** Newsletter Contact Us

Start your learning journey here!

As a Ylopo user, you have access to a variety of training resources available to you. We offer live webinars designed to empower you with the essential skills and knowledge you need to get valuable insights and hands-on guidance from our expert trainers and coaches.

Go Live Bootcamp
Jumpstart your success with this session that covers everything you need to know—from understanding how Ylopo works with your CRM, to mastering your smart calls, utilizing Ylopo Store and leveraging Ylopo AI technology to help you convert your leads.

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 tricks. These experts also share their success stories and advice, and build community with each other.

Realtime-In-Residence Office Hours
Every Wednesday, our amazing Ylopo Realtime-In-Residence joins Office Hours to do what they do best: inspire and educate the Ylopo community. This is a great opportunity to get feedback with those some of the industry and pick their brains on anything 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.

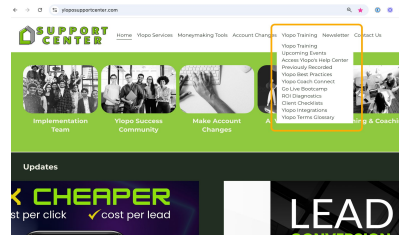
On-Demand Training

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.

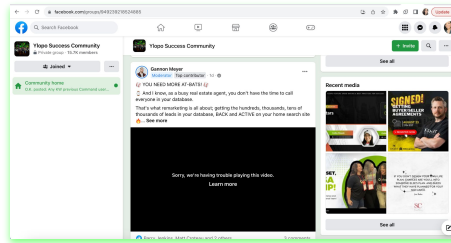
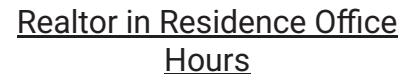
Ylopo New User Training **AI Voice 100: Get to Know AI Voice** **Buyer Agent Commission Mastery**



Live Weekly Training

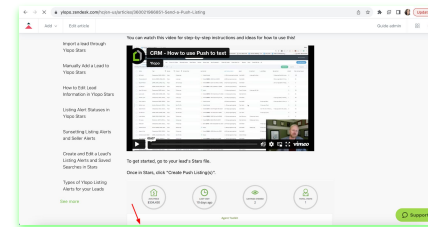


Ylopo Support Center



Ylopo Media Center

Ylopo Success Community



Ylopo Knowledgebase

Ylopo Best Practices

← → ↺ yloposupportcenter.com/ylopo-best-practices



[Home](#) [Ylopo Services](#) [Moneymaking Tools](#) [Account Changes](#) [Ylopo Training](#) [Newsletter](#) [Contact Us](#)

CALL SUPPORT

Ylopo Best Practices

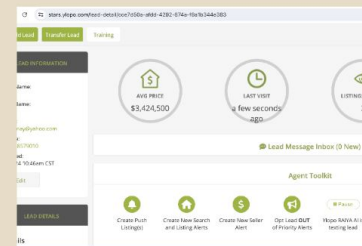
From working new leads to re-engaging old leads: Scroll down to learn more about Ylopo best practices!



Getting Started



Working New Leads



Stars

Ylopo Prospecting Scripts

- Ylopo Scripts for Success by Barry Jenkins
- Best Practices for Seller Report Activities
- Best Practices for taking AI Voice Calls
- Direct Connect Outbound Script Suggestions
- Keys to continuing the conversation

Advice From Seasoned and Successful Ylopo Clients

- ❑ Learn in steps
- ❑ Time block your calendars for working on your business
- ❑ Time block your calendars for working your database
- ❑ Be consistent
- ❑ Import Your leads for remarketing
- ❑ Attend Coaches Office Hours to understand your Ylopo tools and products
- ❑ Attend yearly Ylopo Summits
- ❑ Meet with Ylopo's Marketing team quarterly
- ❑ Take advantage of all the tools, people, and resources provided by Ylopo

**THANK
YOU!**