



New Client Bootcamp

2026 CHARLESTON



SUCCESS SUMMIT
CHARLESTON



Tuesday and Wednesday
May 19th & 20th 2026



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

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



- 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

CRM



- 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

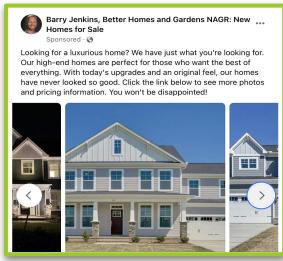
Complete your online training to learn about your specific CRM's integration with Ylopo

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

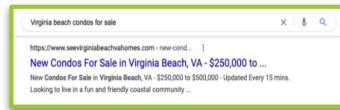
CRM + Ylopo (Stars): Sources

Ylopo Lead Source:

Home Search Site: organic, Facebook



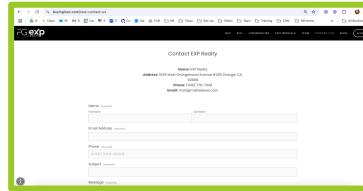
Home Search Site: Google Ads/PPC



Ylopo Source Name in FUB:

- Ylopo Buyers
- Ylopo Sellers
- Direct
- Connect FB
- Ylopo Adwords
- Direct
- Connect PPC
- Ylopo LSA

Branded Site: Organic, Branded Sites Tools Page Tools

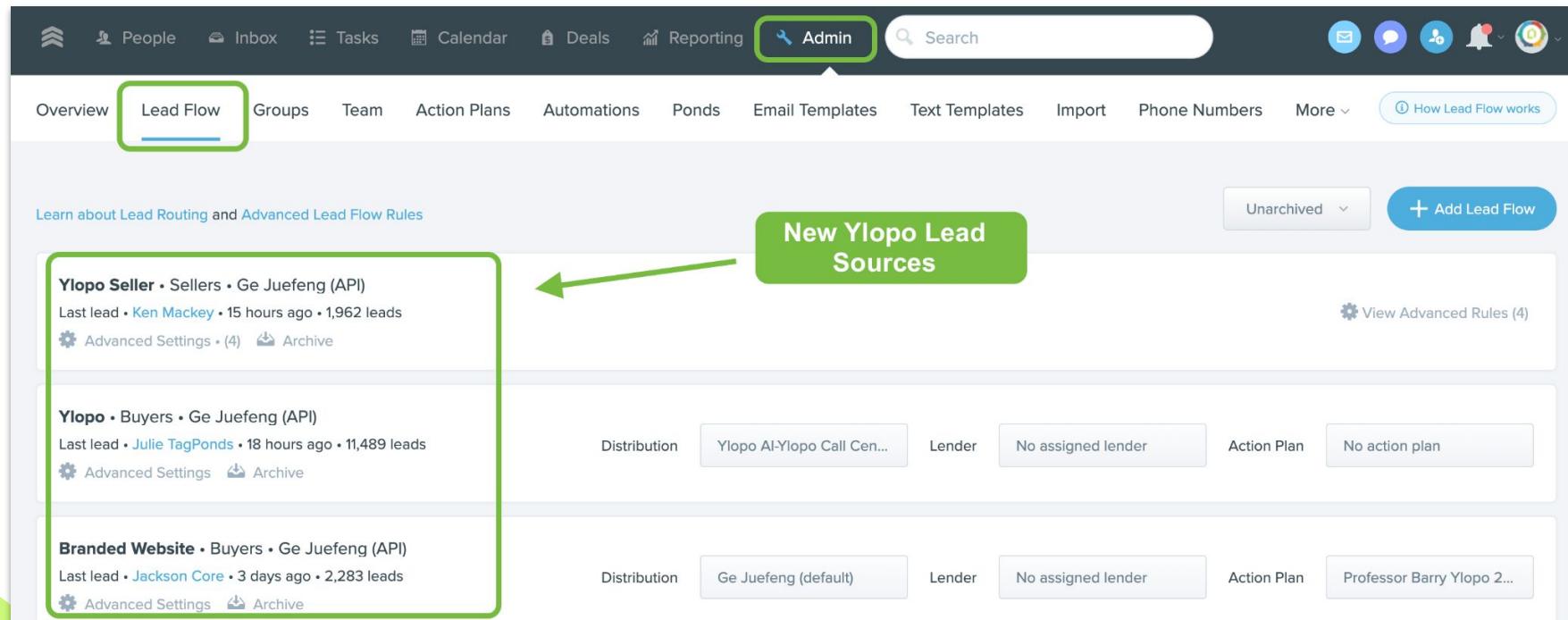


Branded Site Open House Tool



- Branded Website
- Open House (Ylopo)

CRM + Ylopo (Stars): Sources



Lead Flow

Learn about Lead Routing and Advanced Lead Flow Rules

New Ylopo Lead Sources

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

Unarchived

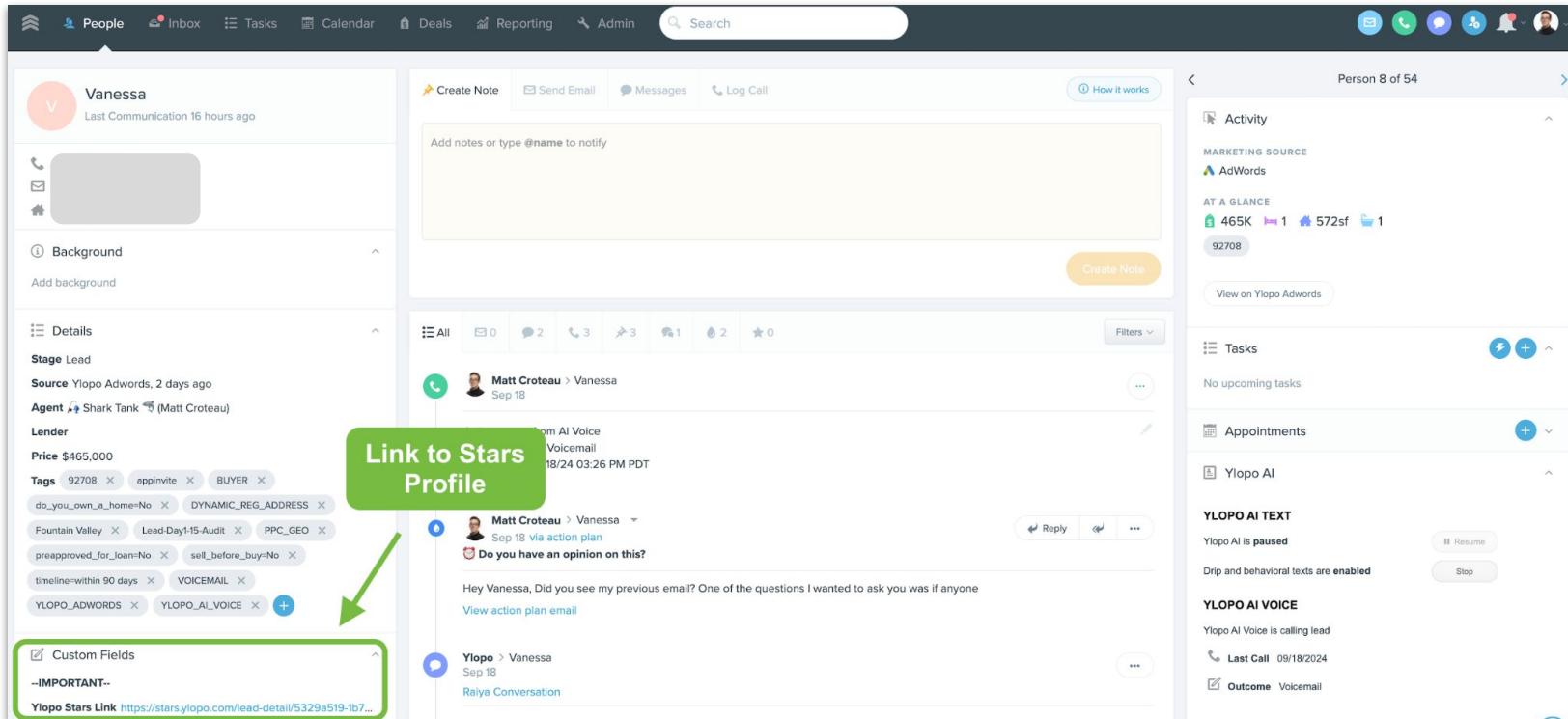
+ Add Lead Flow

View Advanced Rules (4)

Distribution	Lender	Action Plan
Ylopo AI-Ylopo Call Cen...	No assigned lender	No action plan
Ge Juefeng (default)	No assigned lender	Professor Barry Ylopo 2...

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



Link to Stars Profile

Custom Fields

-IMPORTANT-

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

Vanessa

Last Communication 16 hours ago

Background

Details

Stage Lead

Source Ylopo Adwords, 2 days ago

Agent Matt Croteau (Matt Croteau)

Lender

Price \$465,000

Tags 92708, appinvite, BUYER, do_you_own_a_home=No, 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_AL_VOICE

Custom Fields

-IMPORTANT-

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

Create Note

Send Email

Messages

Log Call

How it works

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

Resume

Stop

YLOPO AI VOICE

Ylopo AI Voice is calling lead

Last Call 09/18/2024

Outcome Voicemail

Person 8 of 54

All 0 2 3 3 1 2 0

Matt Croteau > Vanessa Sep 18

From 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

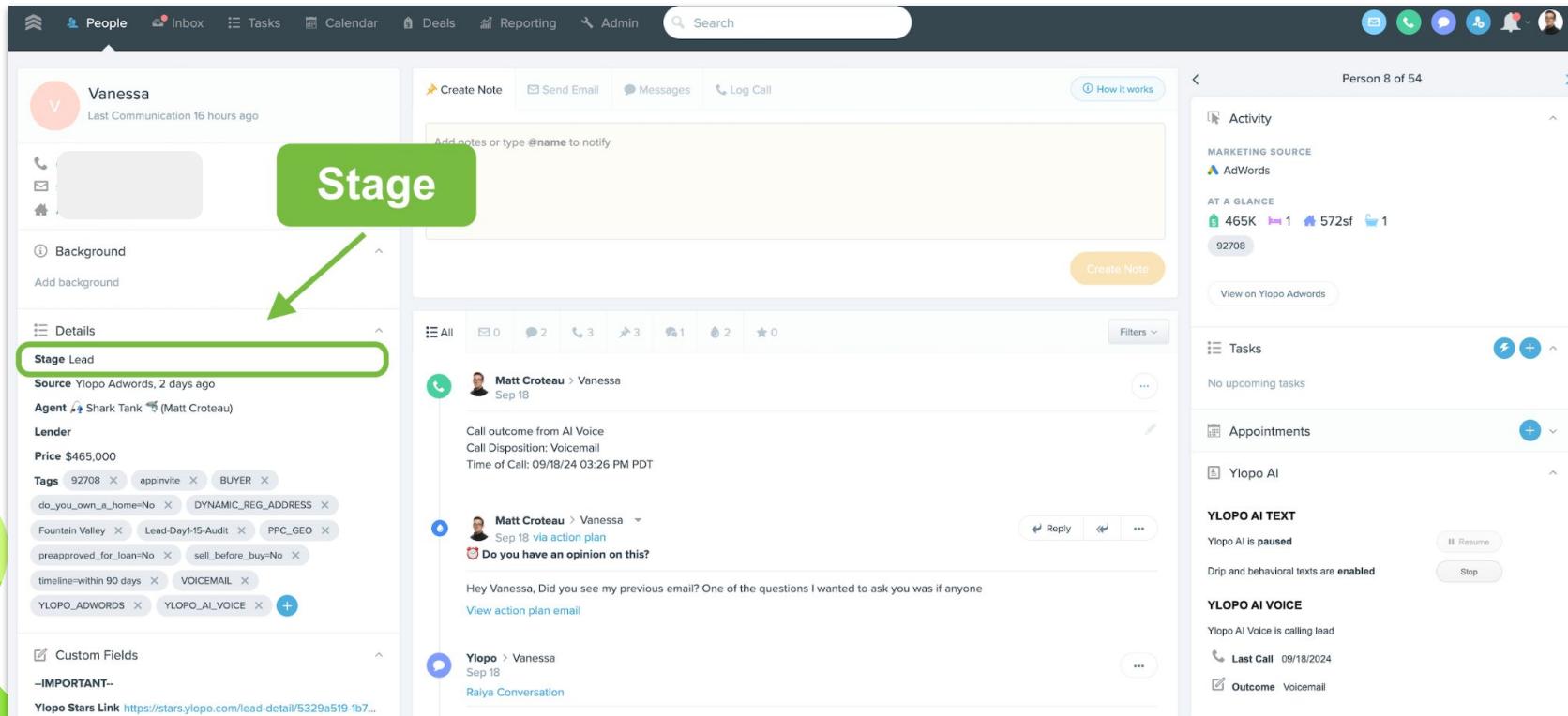
Agents can access Ylopo Stars via Stars Link to manage Ylopo tools

CRM + Ylopo (Stars): Custom Field

The screenshot illustrates the integration between a CRM system and Ylopo's Stars database marketing tool. On the left, a CRM interface shows a lead profile for 'Vanessa' with various contact details and a list of custom fields. A green callout box labeled 'Link to Stars Profile' points to the lead's profile in the Stars interface on the right. The Stars interface displays lead information, including 'First Name: Vanessa', 'Last Name: ', 'Email: ', and 'Created: 9/17/24 5:11pm CDT'. It also features four circular metrics: 'AVG PRICE' (with a house icon), 'LAST VISIT' (with a clock icon, showing '2 days ago'), 'LISTINGS VIEWED' (with an eye icon, showing '0'), and 'TOTAL VISITS' (with a person icon, showing '1'). Below these metrics is a 'Lead Message Inbox' with '2 New' messages. The 'Agent Toolkit' section contains various tools: 'Create Push Listing(s)', 'Create New Search and Listing Alerts', 'Create New Seller Alert', 'Opt Lead OUT of Priority Alerts', 'Pause' (with a play/pause icon), 'Stop' (with a stop icon), 'Drip and behavioral texts are enabled', and 'Opt lead OUT of all listing alerts'. At the bottom right is a 'Live Chat' button.

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



CRM + Ylopo (Stars): Stage

Vanessa
Last Communication 16 hours ago

Stage Lead

Source Ylopo Adwords, 2 days ago
Agent 🚀 Shark Tank (Matt Croteau)
Lender
Price \$465,000
Tags 92708, appinvite, BUYER, do_you_own_a_home=No, 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

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

Create Note Send Email Messages Log Call How it works

Add notes or type @name to notify

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

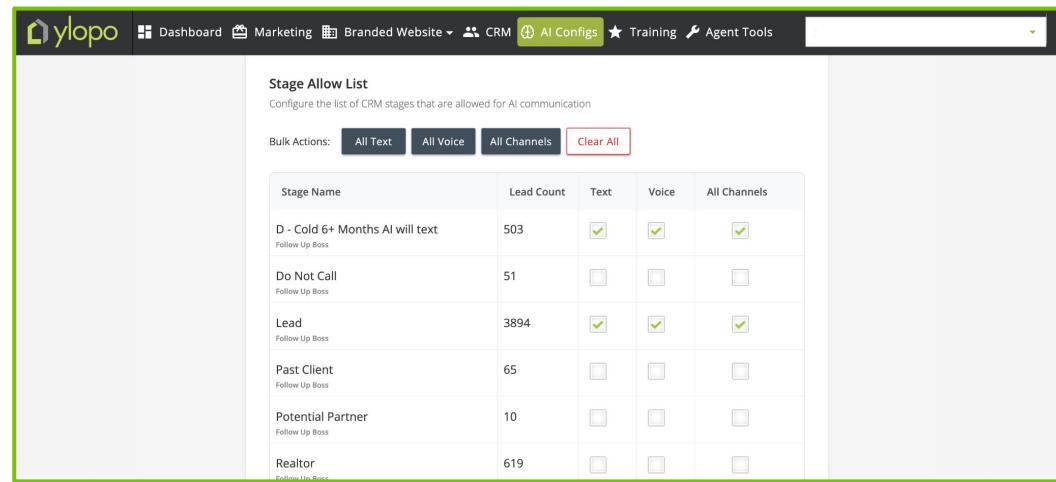
Person 8 of 54

AI blocked or allowed

CRM + Ylopo (Stars): Stage

AI
Recommended blocked stages

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

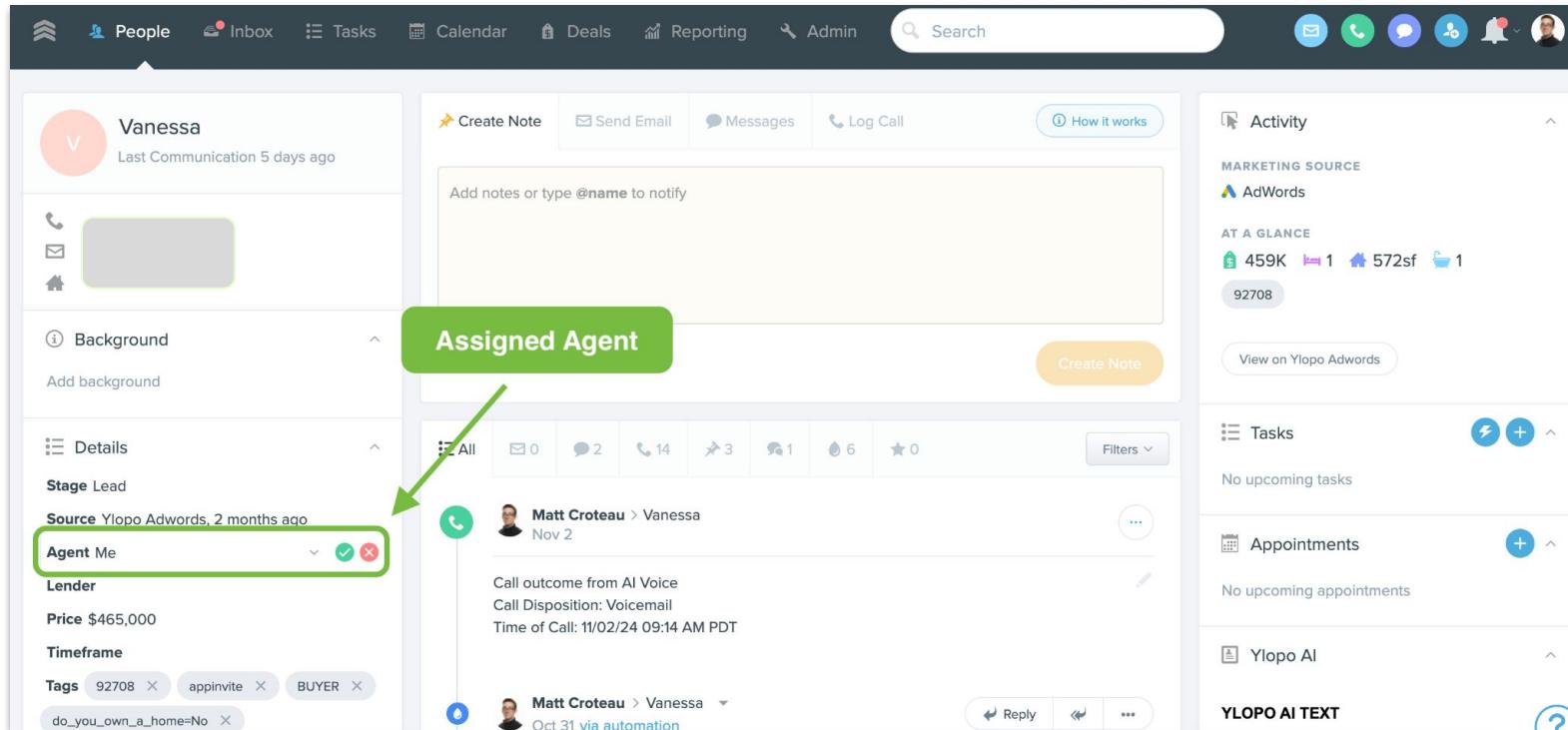


The screenshot shows the Ylopo AI Configs interface with the 'Stage Allow List' page. The page title is 'Stage Allow List' and the sub-instruction is 'Configure the list of CRM stages that are allowed for AI communication'. There are four bulk action buttons: 'All Text', 'All Voice', 'All Channels', and 'Clear All'. The table has columns for Stage Name, Lead Count, and communication preferences (Text, Voice, All Channels). The data is as follows:

Stage Name	Lead Count	Text	Voice	All Channels
D - Cold 6+ Months AI will text	503	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Follow Up Boss				
Do Not Call	51	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Follow Up Boss				
Lead	3894	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Follow Up Boss				
Past Client	65	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Follow Up Boss				
Potential Partner	10	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Follow Up Boss				
Realtor	619	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Follow Up Boss				

- *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 shows a CRM interface with a lead record for "Vanessa". The lead card includes a profile picture, a "Last Communication 5 days ago" note, and a "Background" section. The "Details" section shows the lead is at "Stage Lead" with "Source Ylopo Adwords, 2 months ago". A dropdown menu for "Agent" is open, showing "Agent Me" as the assigned agent. A green arrow points from a "Assigned Agent" callout box to this dropdown. The main workspace shows a list of communications, with the most recent being a call from "Matt Croteau" on Nov 2. The communication details show it was a "Call outcome from AI Voice" with "Call Disposition: Voicemail" and "Time of Call: 11/02/24 09:14 AM PDT". The right sidebar displays "Activity" (Marketing Source: AdWords, At a Glance: 459K, 1, 572sf, 1, 92708), "Tasks" (No upcoming tasks), "Appointments" (No upcoming appointments), and "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, Gabie! Also, there are 5 active listings nearby! [New Agent Training](#)

Ryan Thapar <alerts@ylopo-email.com> to me [Unsubscribe](#)

Fri, Nov 1, 2024, 9:49 AM [Star](#) [Share](#)

Hi Gabie,
Here are the latest market trends in MBY 4G9.
Don't want to receive these emails any more? [Unsubscribe here](#)

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 [Unsubscribe](#)

11:18 AM (5 hours ago) [Star](#)

PRIORITY LEAD ALERT: Miski Abdala
Phone Number: (763) 309-8297
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) 309-8297 and ask them when they are normally free to look at 3615 Zinnia Lane N, Plymouth, MN.
2. Also let them know there are some more in the area they might like too.
3. Connect with them!
4. Make sure to mark this lead 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](#)

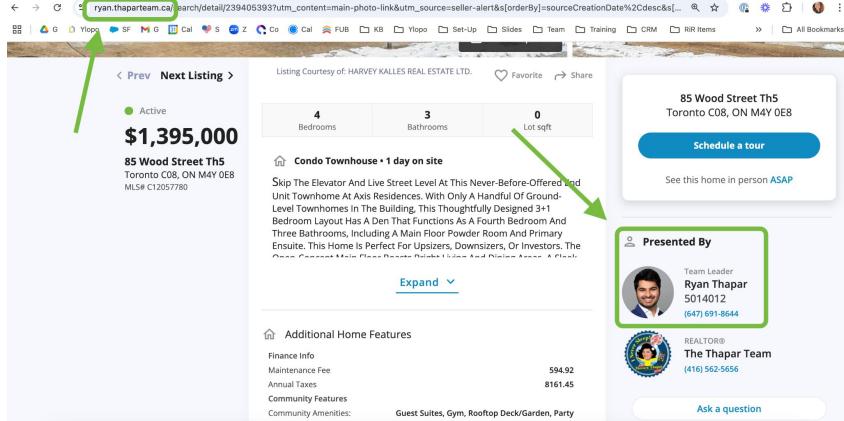
Contact us at [support@ylopo.com](#) if you have any questions!

(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



ryan.thaparteam.ca/search/detail/239405393?utm_content=main-photo-link&utm_source=seller-alert&s[orderBy]=sourceCreationDate%2Cdesc&s[limit]=10

85 Wood Street Th5
Toronto C08, ON M4Y 0E8
MLS# C1205778

\$1,395,000

4 Bedrooms, 3 Bathrooms, 0 Lot sqft

Condo Townhouse • 1 day on site

Skip The Elevator And Live Street Level At This Never-Before-Offered End Unit Townhome At Axis Residences. With Only A Handful Of Ground-Level Townhomes In The Building, This Thoughtfully Designed 3+1 Bedroom Layout Has A Den That Functions As A Fourth Bedroom And Three Bathrooms, Including A Main Floor Powder Room And Primary Ensuite. This Home Is Perfect For Upsizers, Downsizers, Or Investors. The

Presented By

Team Leader
Ryan Thapar
5014012
(647) 691-8644

The Thapar Team
(416) 562-5656

Additional Home Features

Finance Info	994.92
Maintenance Fee	994.92
Annual Taxes	8161.45
Community Features	
Community Amenities:	

Guest Suites, Gym, Roof Deck/Garden, Party Room/Meeting Room, Victorian Parkin, Bike Storage

Ask a question

CRM + Ylopo (Stars): Lead Activity

The screenshot displays a CRM application interface with a dark header bar containing navigation links: People, Inbox, Tasks, Calendar, Deals, Reporting, Admin, and a Search bar. Below the header is a user profile for 'Vanessa' with a recent communication timestamp of '18 hours ago'. The main content area is divided into several sections:

- Lead Activity:** A central box labeled 'Lead Activity' contains a text input field with the placeholder 'Add notes or type @name to notify'. A green arrow points from this box to the 'Activity' section on the right.
- Activity:** This section is highlighted with a green border and shows 'Marketing Source' as 'AdWords'. It displays 'AT A GLANCE' metrics: 465K, 1, 572sf, and 1. A button 'View on Ylopo Adwords' is present.
- Tasks:** Shows 'No upcoming tasks'.
- Appointments:** Shows 'No upcoming appointments'.
- Ylopo AI:** Shows 'YLOPO AI TEXT' with a status message 'Ylopo AI is paused' and controls for 'Resume' and 'Stop'.
- Ylopo AI Text Content:** A box containing lead information: 'Registration from Ylopo page', a long URL, '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', and 'Ad Platform: YLOPO ADWORDS'.
- Left Sidebar:** Includes sections for 'Background' (with 'Add background' button), 'Details' (with 'Stage Lead' as 'Lead', 'Source' as 'Ylopo Adwords, 2 days ago', 'Agent' as 'Shark Tank (Matt Croteau)', 'Lender', 'Price' as '\$465,000', and 'Tags' including '92708', 'appinvite', 'BUYER', 'do_you_own_a_home=No', 'DYNAMIC_REG_ADDRESS', and '9 more').

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

CRM + Ylopo (Stars): Lead Activity

Ad Engagement

AI Text



The screenshot shows a real estate software interface. On the left, a sidebar displays 'Lead Information' for a property with a price of \$445,000, last viewed a day ago, and 1 unique views. It also shows a 'Lead Details' section with 'Lead Type: Residential', 'Lead Source: Cold Call', 'Lead Status: Pending', and a 'Follow Up Reason' dropdown set to 'Follow Up Reason'. Below these are buttons for 'Lead Details', 'Lead Type', 'Lead Status', and 'Follow Up Reason'. At the bottom of the sidebar is a 'Logout' button. The main content area shows a lead message from 'Yolpo' to 'Lauren Chifo' at 9:00 am, with the subject 'Re/Max Conversation'. The message content is: 'Hi Lauren I am Matt's assistant. Matt may have reached out earlier and I wanted to follow up to find out your 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.' Below this message is a 'Re/Max Conversation' button. A second message from 'Yolpo' at 9:03 am is partially visible, starting with 'Let me know'.

AI Voice

The screenshot shows a mobile phone's call log screen. At the top, there are icons for All (1), Mail (0), Chat (2), Calls (2), Voicemail (1), and Battery (2). Below this is a list of recent calls. The first call in the list is from "Matt Croteau" to "Lauren Chifo" on April 10, with a "No Answer" disposition. The call log also includes entries for "Call Outcome from AI Voice", "Call Disposition: No Answer", "Time of Call: 04/10/25 12:34 PM PDT", and "Call Type: Outbound".

Home Search Site Activity

PG exp

Living Officer United Realty Century Inc
listing agent: priya halsted

See all 10 photos

1 Bed 1 Bath 850 sqft 0 garage

25422 Sea Breeze Dr
Dana Point, CA

\$349,000

All 0 2 4 2 1 2 0

Ylopo
Apr. 10

Recent Activity

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/3mf4A1>

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

Seller Report & Listing Alerts

The screenshot shows the Ylopo mobile application interface. At the top, there's a header with the text 'Your Estimated Home Values' and an address '20160 Hibbets Drive, Orange, CA 92869'. Below this, there are three large sections for estimated home values:

- \$2,700,000**
Data powered by Habbi Capital
Data last updated on Oct 11, 2018
- \$2,656,800**
Data powered by Habbi Capital
- \$2,499,000**
Data powered by ATTOM

Each section includes a bar chart showing the estimated value and a 'View Details' button. The main interface features a navigation bar with icons for Home, All, Mail (0), Chat (0), Phone (1), and Notifications (3). Below the navigation bar, there's a section titled 'Recent Activity' with a heading 'Ylopo Apr 10' and a sub-section 'Recent Activity'.

CRM + Ylopo (Stars): Tags

Tags

Vanessa
Last Communication a day ago

Background
Add background

Details

Stage Lead
Source Ylopo Adwords, 6 days ago
Agent Matt Croteau (Matt Croteau)
Lender
Price \$465,000

Tags 92708 x appinvite x BUYER x do_you_own_a_home=No x DYNAMIC_REG_ADDRESS x Fountain Valley x GHOST_CALL 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

Create Note Send Email Messages Log Call How it works

Add notes or type @name to notify Create Note

All 0 2 8 3 1 4 0 Filters

Matt Croteau > Vanessa 9:09 am via action plan
Did I drop the ball? 🎾
Can you help me? I know you're receiving my emails but you haven't responded. Did I do something
View action plan email

Matt Croteau > Vanessa Sep 22
Call outcome from AI Voice
Call Disposition: Voicemail
Time of Call: 09/22/24 10:21 AM PDT

Matt Croteau > Vanessa Sep 21

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 09/22/2024
Outcome Voicemail

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

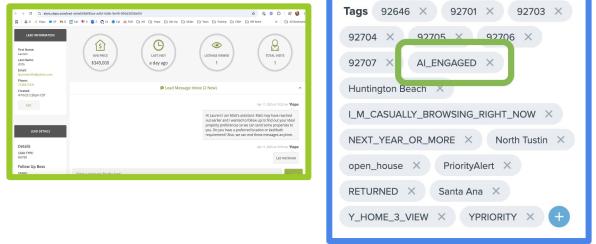
Ad Engagement



The Fernandez Group - EXP Realty sponsored
This La Habra property just sold in your area! Contact me if you hope to sell in the next 6-12 months. Many people are currently looking for a home in your area. Below is a short description of this property we used to attract so many buyers.
Welcome to this beautiful, beautifully maintained 3 bedroom, 2-bathroom home in a peaceful neighborhood. This property offers a comfortable and functional layout, perfect for anyone looking to enjoy a serene living environment. The home... See more
1262 SqFt

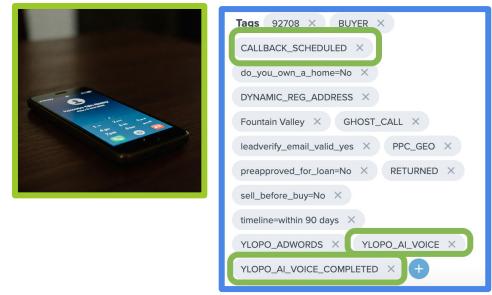
Tags: 6_TO_12_MONTHS, 73_BELL_CANYON_DRIVE, BUYER, FINANCING_REQUIRED, leadverify_email_valid_yes, LISTING_ROCKET, LUXURY_BUYER, NEW_LISTING, RANCHO_SANTA_MARGARITA_CA, VOICEMAIL, YLOPO_AI_VOICE, YLOPO_FACEBOOK

AI Text



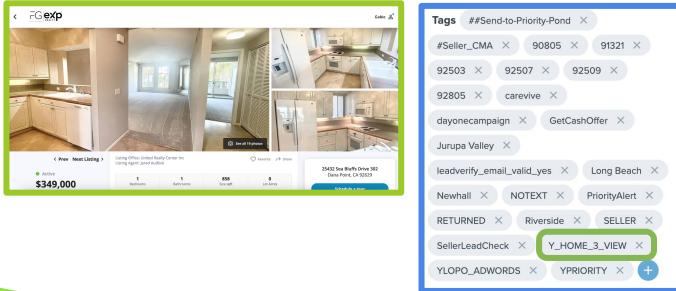
Tags: 92646, 92701, 92703, 92704, 92705, 92706, 92707, AI_ENGAGED, Huntington Beach, I_M_CASUALLY_BROWSER_NOW, NEXT_YEAR_OR_MORE, North Tustin, open_house, PriorityAlert, RETURNED, Santa Ana, Y_HOME_3_VIEW, Y_PRIORITY

AI Voice



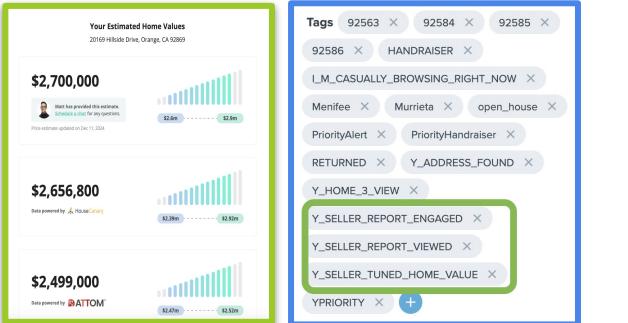
Tags: 92708, BUYER, CALLBACK_SCHEDULED, do_you_own_a_home-No, DYNAMIC_REG_ADDRESS, Fountain Valley, GHOST_CALL, leadverify_email_valid_yes, PPC_GEO, preapproved_for_loan-No, RETURNED, sell_before_buy_No, timeline-within 90 days, YLOPO_ADWORDs, YLOPO_AI_VOICE, YLOPO_AI_VOICE_COMPLETED

Home Search Site Activity



PGexp
\$349,000
#Seller_CMA, 90805, 91321, 92503, 92507, 92509, 92805, careview, dayonecampaign, GetCashOffer, Jurupa Valley, leadverify_email_valid_yes, Long Beach, Newhall, NOTEXT, PriorityAlert, RETURNED, Riverside, SELLER, SellerLeadCheck, Y_HOME_3_VIEW, YLOPO_ADWORDs, Y_PRIORITY

Seller Report & Listing Alerts



Estimated Home Values
20169 Hillside Drive, Orange, CA 92869
\$2,700,000
\$2,656,800
\$2,499,000
Tags: 92563, 92584, 92585, 92586, HANDBRAISER, I_M_CASUALLY_BROWSER_NOW, Menifee, Murrieta, open_house, PriorityAlert, PriorityHandraiser, RETURNED, Y_ADDRESS_FOUND, Y_HOME_3_VIEW, Y_SELLER_REPORT_ENGAGED, Y_SELLER_REPORT_VIEWED, Y_SELLER_TUNED_HOME_VALUE, Y_PRIORITY

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

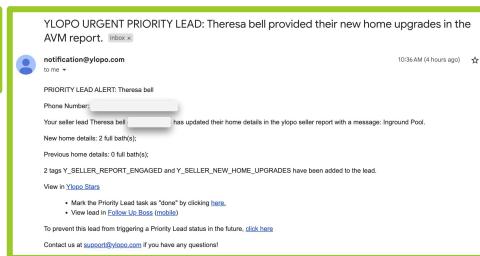
Ylopo Notifications: Priority Notifications

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!

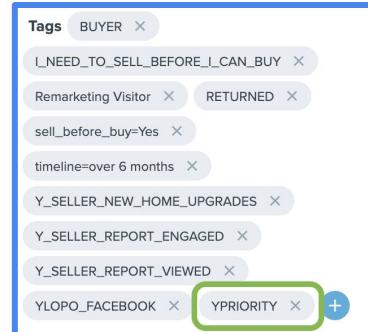
**Priority Text
sent to agent**



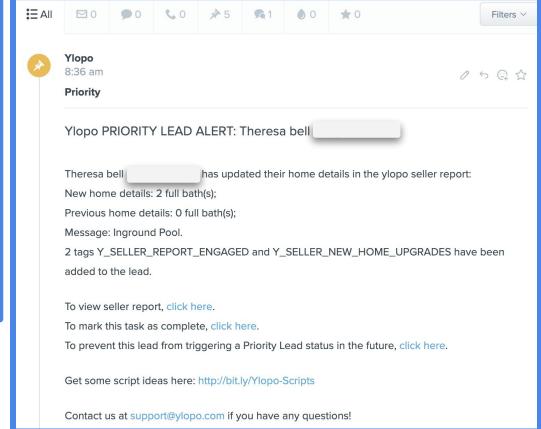
**Priority Email
sent to agent**



**YPRORITY tag
added on lead profile**



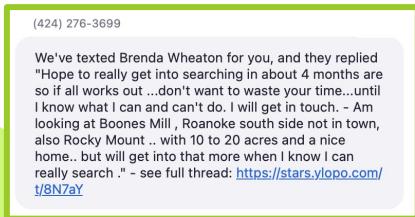
**Priority notes
added to lead profile in CRM**



Ylopo Notifications: Responses to AI Texting

When someone responds to your AI text assistant, the assigned agent will receive a text and an email notification. Within the leads profile in the CRM a relevant AI text tag is applied in the tag section and the conversation is added to activity/notes section.

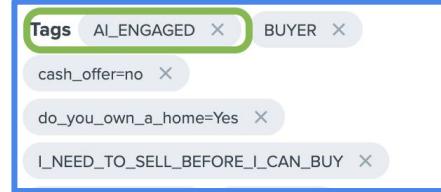
Text notification sent to agent



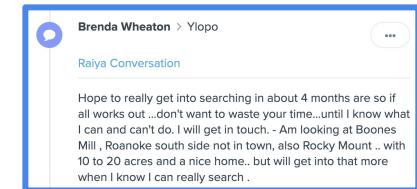
Email notification sent to agent



AI Text Tag added to CRM profile



Conversation added to lead profile in CRM



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

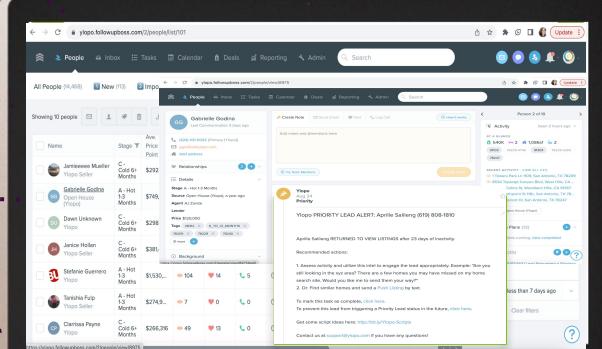
Provide your clients and potential clients with access to valuable information and tools

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

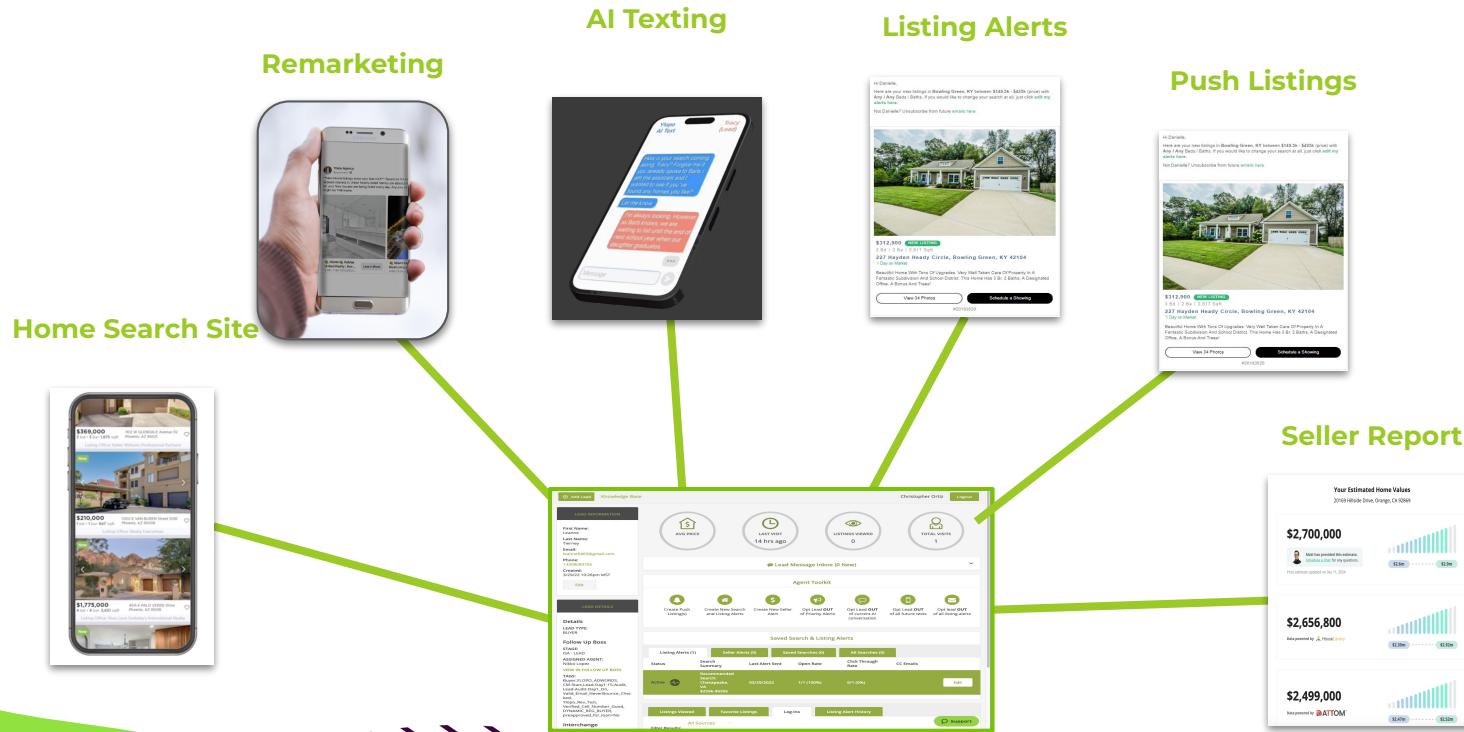
- Using Stars to engage and nurture leads
- Additional Training and Resources

02

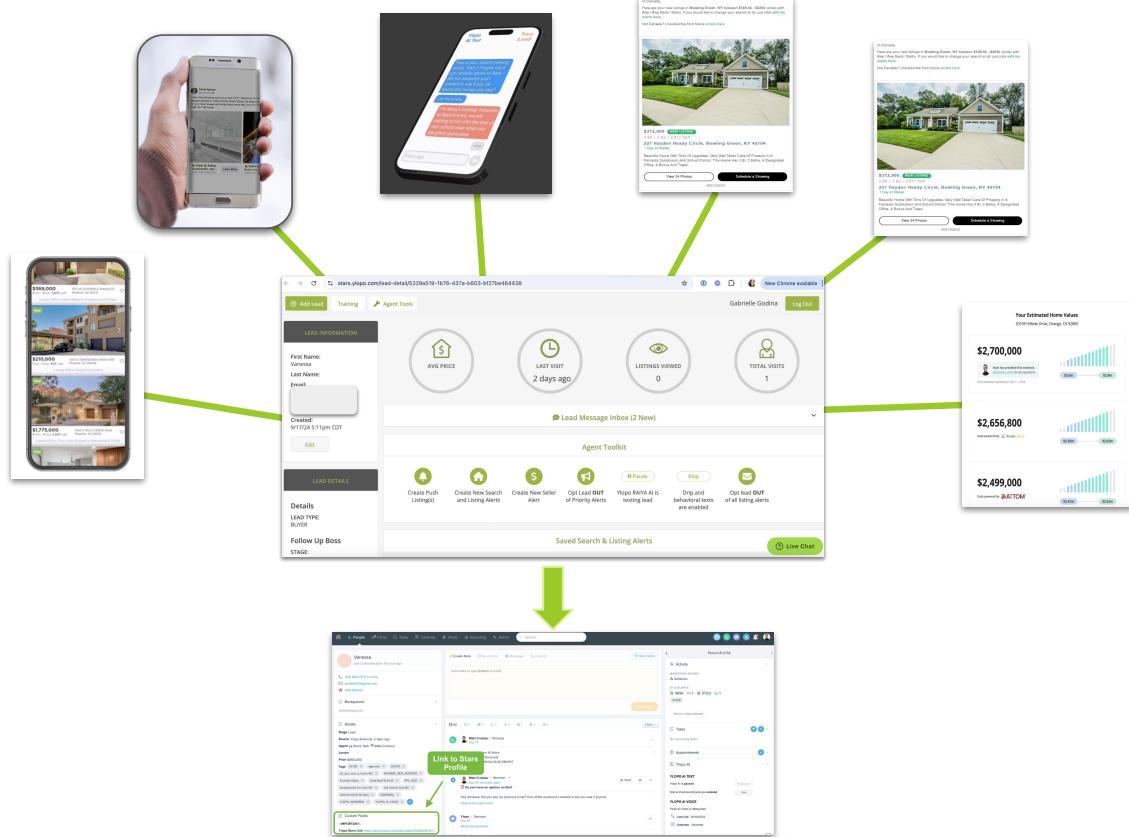
Q&A

End

Utilize Ylopo Stars for Lead Engagement and Nurturing

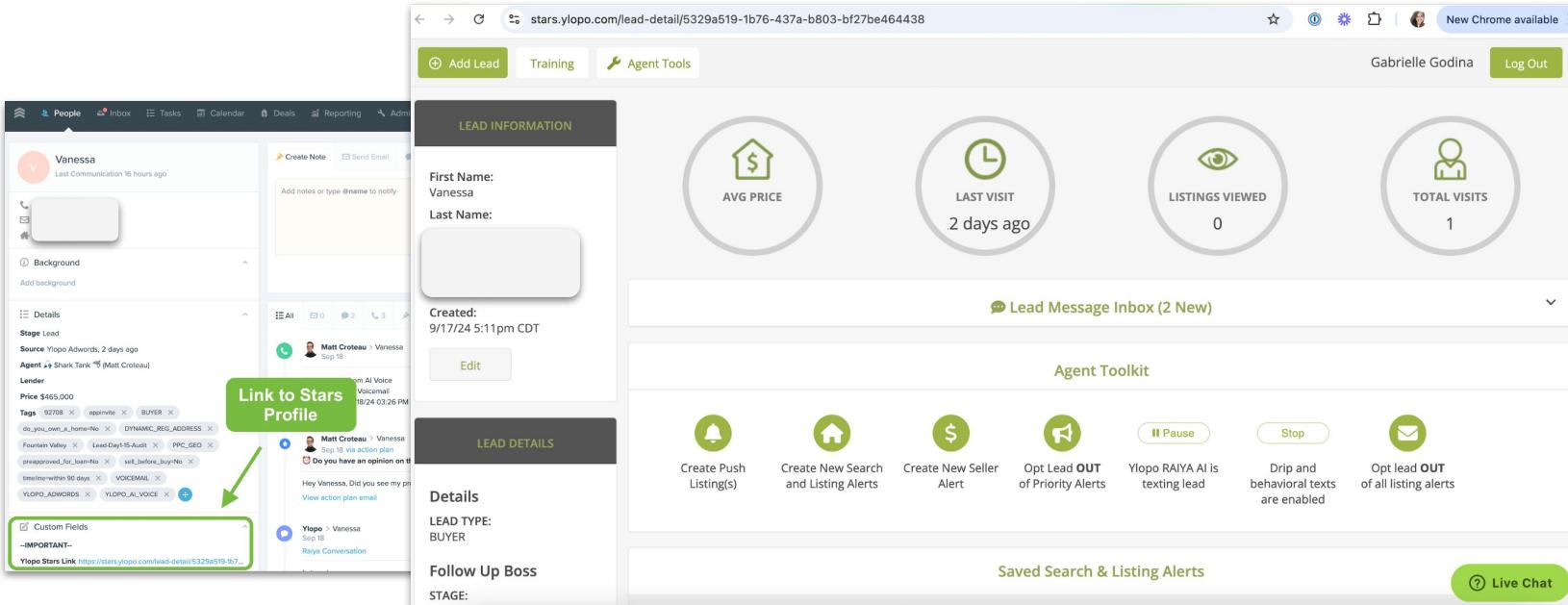


CRM + Ylopo (Stars): Integration



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 shows the Stars real estate CRM interface. At the top, there are tabs for 'Add Lead', 'Training', and 'Agent Tools'. The 'Agent Tools' tab is active, showing a 'LEAD INFORMATION' section with fields for First Name (Vanessa), Last Name (empty), and Created (9/17/24 5:11pm CDT). Below this are 'LEAD DETAILS' sections for 'Details' (LEAD TYPE: BUYER) and 'Follow Up Boss' (STAGE: empty). To the right, there are four circular performance metrics: 'AVG PRICE' (green house icon), 'LAST VISIT' (blue clock icon, 2 days ago), 'LISTINGS VIEWED' (blue eye icon, 0), and 'TOTAL VISITS' (blue person icon, 1). A 'Lead Message Inbox' shows 2 new messages. The 'Agent Toolkit' section contains buttons for 'Create Push Listing(s)', 'Create New Search and Listing Alerts', 'Create New Seller Alert', 'Opt Lead OUT of Priority Alerts' (with a 'Pause' button), 'Drip and behavioral texts are enabled', and 'Opt lead OUT of all listing alerts'. A 'Saved Search & Listing Alerts' section is also present. A green callout box labeled 'Link to Stars Profile' points to a link in the 'Custom Fields' section of the lead details. A green arrow points from this callout to a green box containing the URL 'Ylopo Stars Link: https://stars.ylopo.com/lead-detail/5329a519-1b76-437a-b803-bf27be464438'.

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:

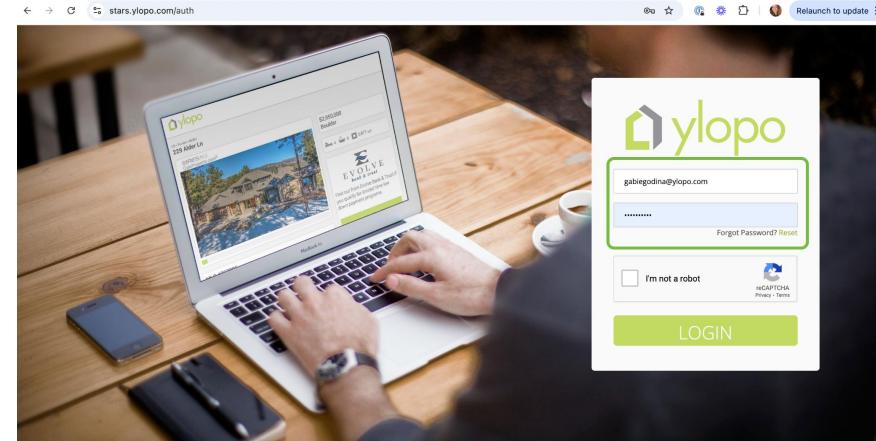
Username: ggodina@ylopo.com

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.

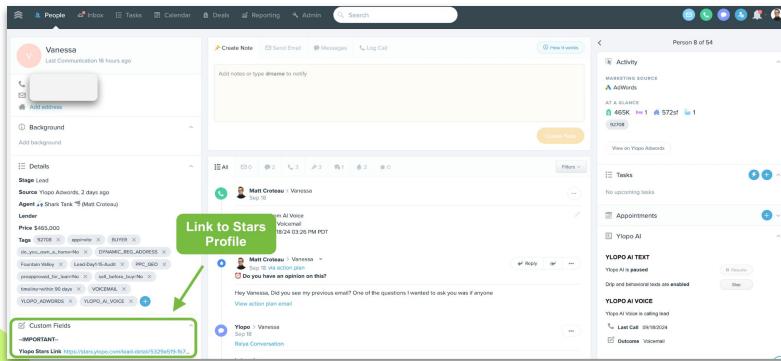
Your Stars login information will be sent to you from Ylopo via email



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

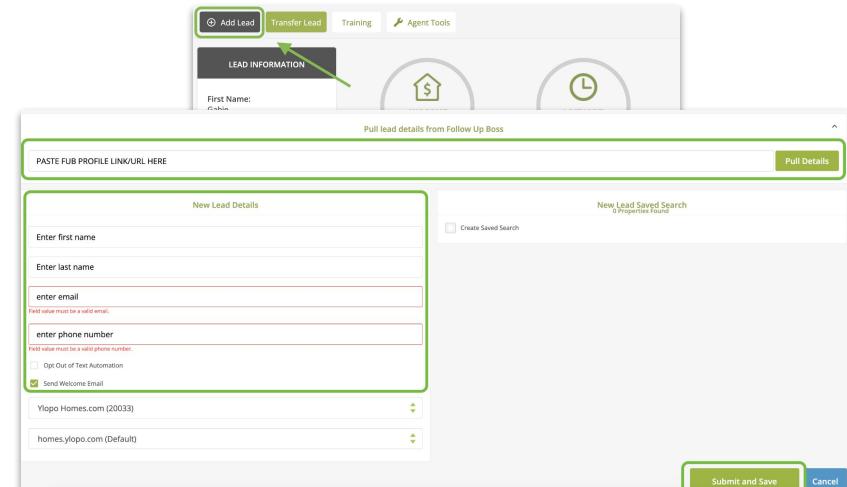
A contact must be in Stars to utilize Ylopo tools like AI texting, listing alerts and remarketing



This screenshot shows the Ylopo AI interface. On the left, there's a sidebar with contact details for 'Vanessa' and a 'Link to Stars Profile' button. The main area shows an AI conversation with 'Matt Croreau - Vanessa'. The AI is asking for an opinion on a previous email. The interface includes sections for 'YLOPO AI TEXT', 'YLOPO AI VOICE', and 'YLOPO AI VOICE' again. At the bottom, there's a 'Custom Fields' section with an 'IMPORTANT' note and a 'Ylopo Stars Link'.

[Learn More](#)

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



This screenshot shows the 'Add Lead' form in the Stars interface. At the top, there are tabs for 'Add Lead' (which is highlighted with a green arrow), 'Transfer Lead', 'Training', and 'Agent Tools'. The main section is titled 'LEAD INFORMATION' and contains fields for 'First Name' and 'Last Name'. Below this is a section titled 'PASTE FUB PROFILE LINK/URL HERE' with a text input field. To the right, there's a 'New Lead Saved Search' section and a 'Create Saved Search' button. At the bottom, there are 'Submit and Save' and 'Cancel' buttons.

[Watch Now](#) ▶

Stars: Remarketing

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



[Learn More](#)

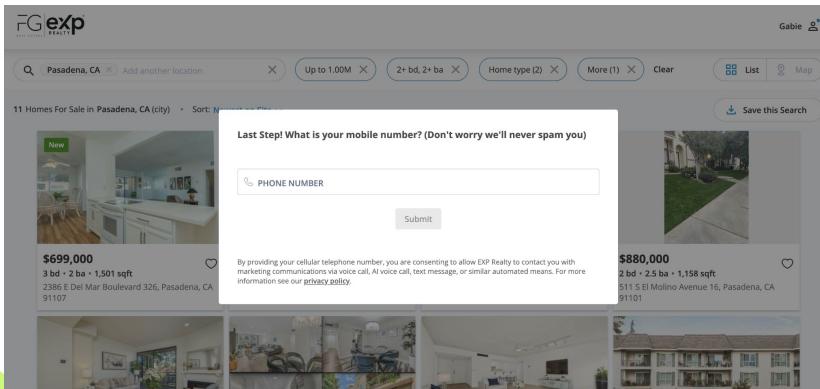
Leads with Stars Profiles/Links are eligible for remarketing.

A screenshot of the YOLO AI software interface. On the left, a lead profile for 'Vanessa' is shown with various details like stage, lead source, and notes. A green box highlights the 'Link to Stars Profile' button. On the right, a 'LEAD INFORMATION' card is displayed for 'Vanessa' with metrics like 'Avg Price' and 'Last Visit'. A green box highlights the 'YOLO Stars Link' URL: 'stars.yollo.com/lead-detail/5329a519-1b76-437a-bb03-bf27be664438'. A green arrow points from this link to a browser window showing the same lead detail page. The interface also includes sections for 'Agent Toolkit' and 'Saved Search & Listing Alerts'.

[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](#)

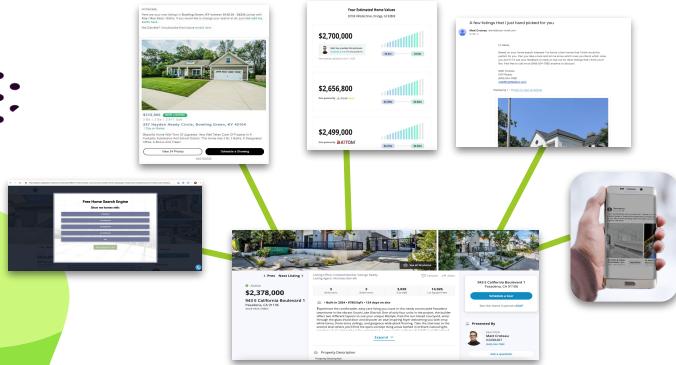
Manage Lead Information in Stars

A screenshot of the Stars software interface. At the top, there are buttons for 'Add Lead', 'Transfer Lead', 'Training', and 'Agent Tools'. Below this, a 'LEAD INFORMATION' form is displayed with fields for First Name (Gable), Last Name (Godina), Email (ggodina@ylopo.com), Phone (4244310042), and a checked 'Bad Phone Number' checkbox. The form also shows the creation date: 6/6/22 2:53pm CDT. At the bottom of the form are 'Save' and 'Cancel' buttons. To the right of the form, there are three circular icons: 'AVG PRICE' (\$1,141,619), 'LAST VISIT' (7 days ago), and 'LISTINGS' (20). Below these are sections for 'Lead Message Inbox (5 New)', 'Agent Toolkit' with buttons for 'Manage Push Listing(s)', 'Create New Search and Listing Alerts', 'Create New Seller Alert', 'Opt Lead OUT of Priority Alerts', and 'Paused' (with a 'Resume' button). At the bottom, there is a 'Saved Search & Listing Alerts' section.

[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

Lead Message Inbox (0 New)

Dec 5, 2024 at 11:34 am YILOPO

Hey Venessa I've been house hunting for you and found a couple here: <https://barry.buyingva.com/t3bWALK> Barry's assistant w/ Better Homes and Gardens NAGR

Venessa Dec 5, 2024 at 11:39 am

I'd rather be in North Carolina new construction but thank you anyway.

Dec 5, 2024 at 11:40 am YILOPO

North Carolina sounds exciting! Are you considering making a move anytime soon?

Enter a message for the lead

Text as AI Text Assistant here

Send

Agent Toolkit

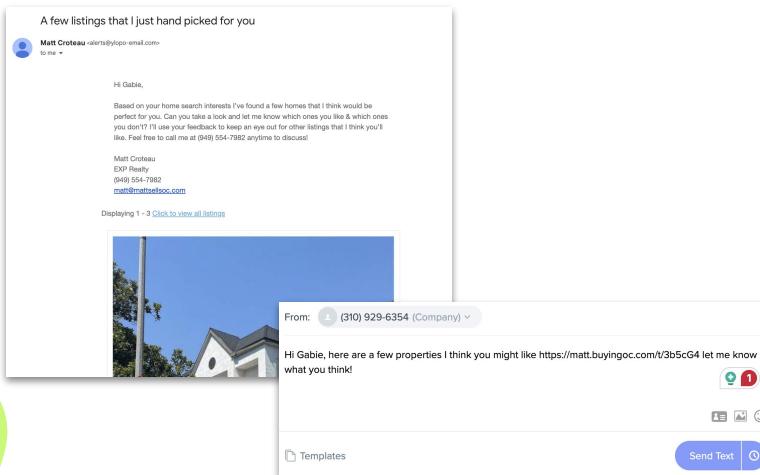
- Create Push Listing(s)
- Create New Search and Listing Alerts
- Create New Seller Alert
- Opt Lead OUT of Priority Alerts
- YILOPO RAIYA AI is texting lead
- Stop
- Drip and behavioral texts are enabled
- Opt lead OUT of all listing alerts

Live Chat

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

A screenshot of the Push Listing Tool in the Stars software. At the top, it shows a lead record for "6199900444" created on "12/27/24 1:37am CST". Below this is a "LEAD DETAILS" section with "LEAD TYPE: BUYER" and a "Follow Up Boss" section with "STAGE: Lead", "ASSIGNED AGENT: Matt Croteau", and "TAGS: 92656 Alice Viejo.apninvite". To the right, there is a "Lead Message Inbox (0 New)" with a green button labeled "Create Push Listing(s)". Below the inbox are several tool icons: "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". An arrow points from the "Create Push Listing(s)" button to the "Create New Search and Listing Alerts" icon. At the bottom, there is a "Saved Search & Listing Alerts" table with columns for "Listing Alerts (1)", "Seller Alerts (0)", "Saved Searches (0)", and "All Searches (1)". The table shows one active listing alert for "92656 Alice Viejo.apninvite" with a dynamic search type, recommended search, daily frequency, and 1/2 (50%) open rate.

[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



[Learn more](#)

Manage Listing Alerts in Stars

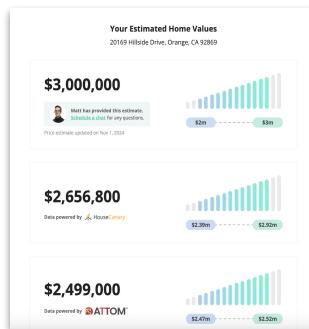
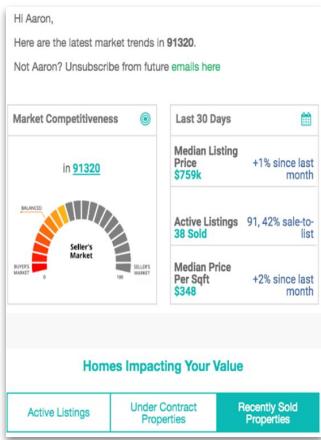
The screenshot shows the "Agent Toolkit" interface for managing listing alerts. It features a "Saved Search & Listing Alerts" table with the following data:

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%)	GD 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

SELLER DETAILS

Property Address (1 of 2)
2432 Sandfiddler Road
Virginia Beach, VA 23456
5 bd - 2 ba - 6834 sqft [Edit](#)

House Canary Estimated Value: \$3,848,100
ATTOM Estimated Value: \$3,640,017
Your Estimated Value: Add Value [View Seller Report](#)

Agent Toolkit

Create Push Listing(s) Create New Search and Listing Alerts **Create New Seller Alert** Opt Lead OUT of Priority Alerts Yello RAIYA AI is texting lead Drip and behavioral texts are enabled Opt lead OUT of all listing alerts

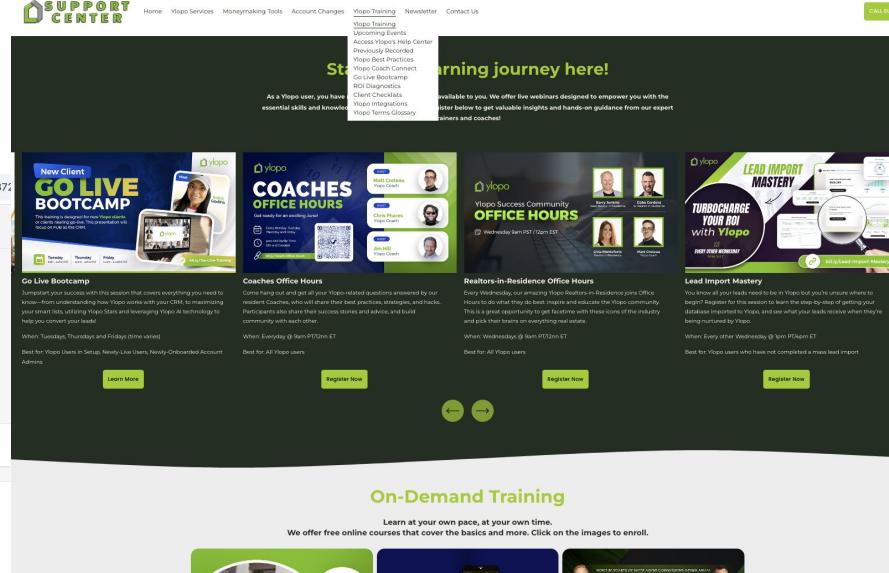
Saved Search & Listing Alerts

Listing Alerts (1)	Seller Alerts (2)	Saved Searches (0)	All Searches (3)
Status	Search Type	Search Summary	Email Campaign
Active	Seller Alert	Seller Alert 21 Nov 2024 (2 of 2) 2432 Sandfiddler Road Virginia Beach, VA 23456 5 bd - 2 ba - 6834 sqft Edit	Yello AVM Report Monthly 11/22/2024 1/1 (100%) 0/1 (0%)

Watch Now

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

Ylopo Training and Coaching Resources

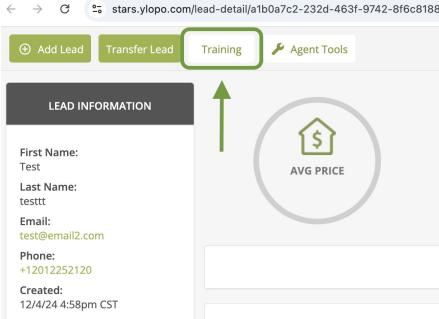


The screenshot displays the Ylopo Support Center website, featuring a navigation bar with links to Home, Ylopo Services, Monymaking Tools, Account Changes, Ylopo Training, Newsletter, and Contact Us. A 'CALL SUPPORT' button is also present. The main content area is titled 'Start your learning journey here!' and includes sections for 'Previously Recorded Webinars', 'Upcoming Events', and 'Ylopo Success Community'. Below these are several promotional banners for training programs:

- Go LIVE Bootcamp**: A 'New Client' bootcamp for Ylopo users.
- COACHES OFFICE HOURS**: A 'Get ready for an exciting Alert!' session.
- Residents-in-Residence Office Hours**: A 'Come hang out and learn from three related sessions' event.
- TURBOCHARGE YOUR ROI with Ylopo**: A 'PAY IT FORWARD' event.
- LEAD IMPORT MASTERY**: A 'LEARN FROM THE EXPERTS' event.

At the bottom, there is an 'On-Demand Training' section with three course thumbnails:

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



The screenshot shows a lead detail page from stars.ylopo.com. The lead information for 'Test' is displayed, including the lead's name, email, phone number, and creation date. A green arrow points upwards from the lead information towards a circular icon containing a house and a dollar sign, labeled 'AVG PRICE'. Below this, there are three buttons: 'Add Lead', 'Transfer Lead', and 'Training'. The 'Training' button is highlighted with a green box and a green arrow pointing to it. Other buttons include 'Agent Tools' and a magnifying glass icon.

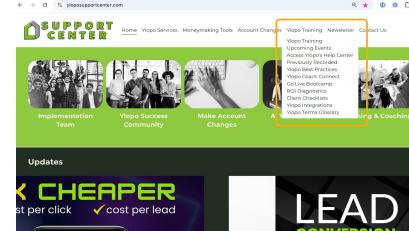
Ylopo Training and Coaching Resources



Online Training Courses



Live Weekly Training



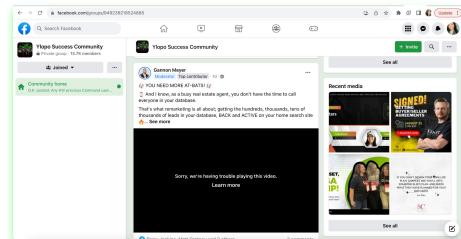
Ylopo Support Center



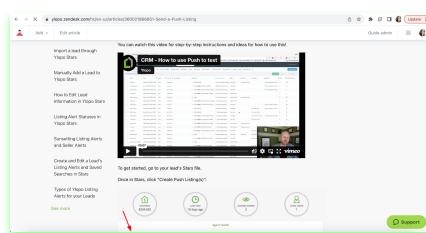
Realtor in Residence Office Hours



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

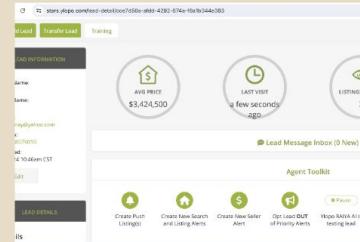
From working new leads to re-engaging old leads: Scroll down to learn more about Ylopo best practices!



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!