ylopo

New Client Bootcamp

ylopo | 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

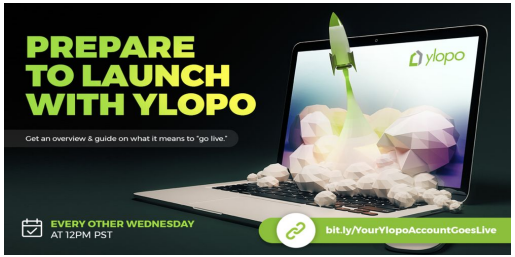
Ylopo Marketing For You

Home Search Site

Ylopo Branded Sites

Ylopo & Lofty (formerly Chime)

Live Training



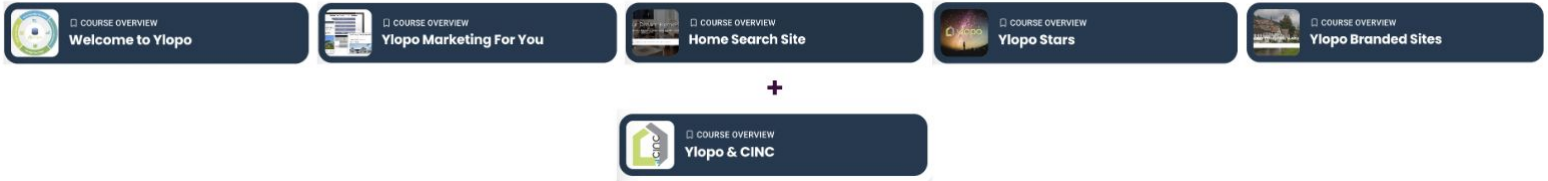
✅ Implementation:
License Launch, CRM + Ylopo Integration

✅ 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

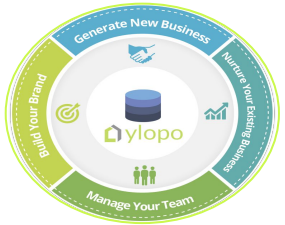
- Lead Generation
- Remarketing
- AI Assistants
- Home Search Site, Branded Site
- Agent tools
- Training & Coaching

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

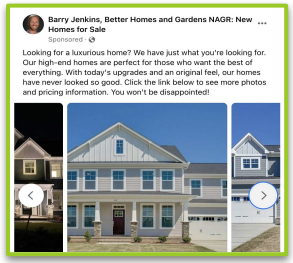
Complete your online training to learn about your specific CRM's integration with Ylopo

Visit our Help Center for more articles on the CRM + Ylopo integration

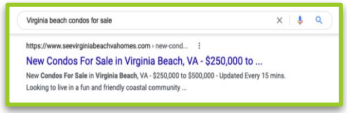
CRM + Ylopo (Stars): Sources

Ylopo Lead Source:

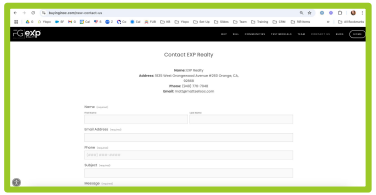
Home Search Site: organic, Facebook



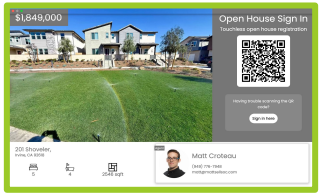
Home Search Site: Google Ads/PPC



Branded Site: Organic, Branded Sites Tools Page Tools



Branded Site Open House Tool



Ylopo Source Name in FUB:

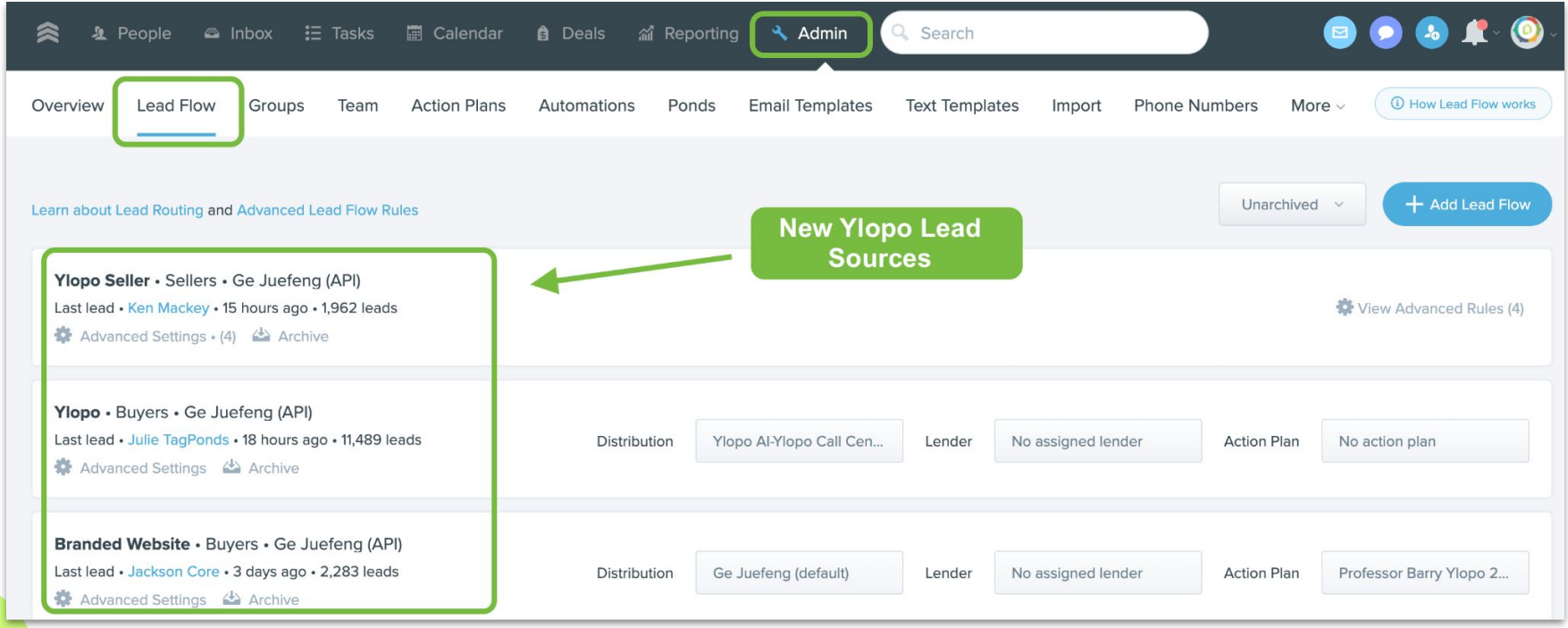
- Ylopo Buyers
- Ylopo Sellers
- Direct Connect FB

- Ylopo Adwords
- Direct Connect PPC
- Ylopo LSA

- Branded Website

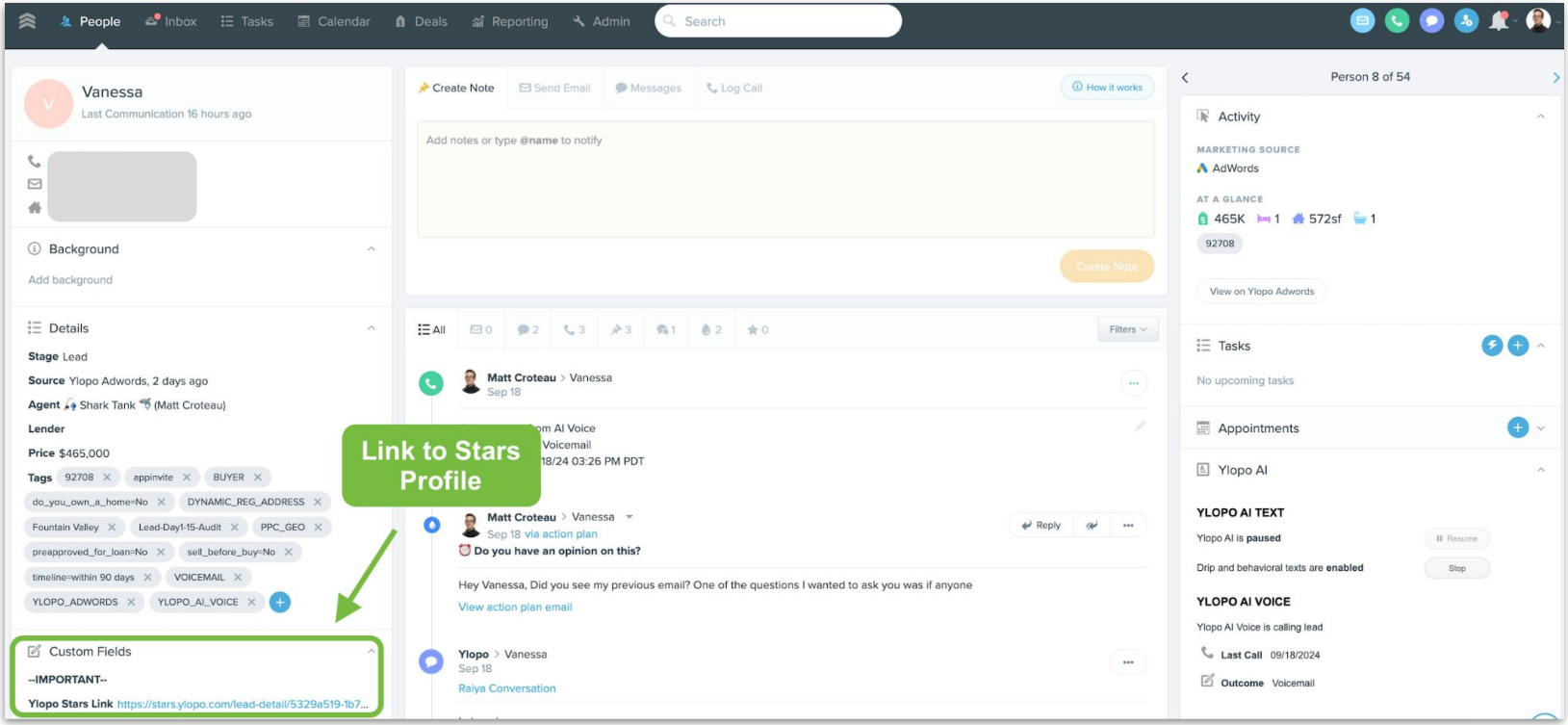
- Open House (Ylopo)

CRM + Ylopo (Stars): Sources



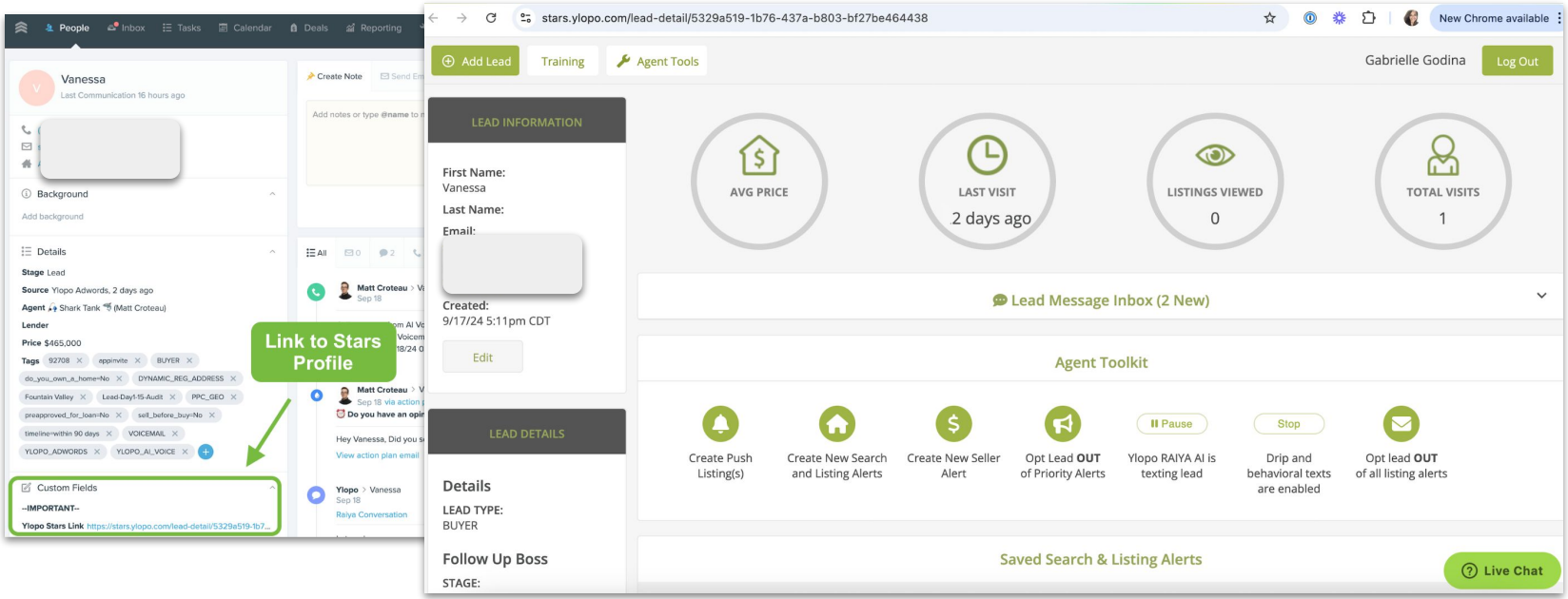
FUB users: Ylopo will only set up lead distribution for AI Voice eligible lead sources based on your AI Voice set up.

CRM + Ylopo (Stars): Custom Field



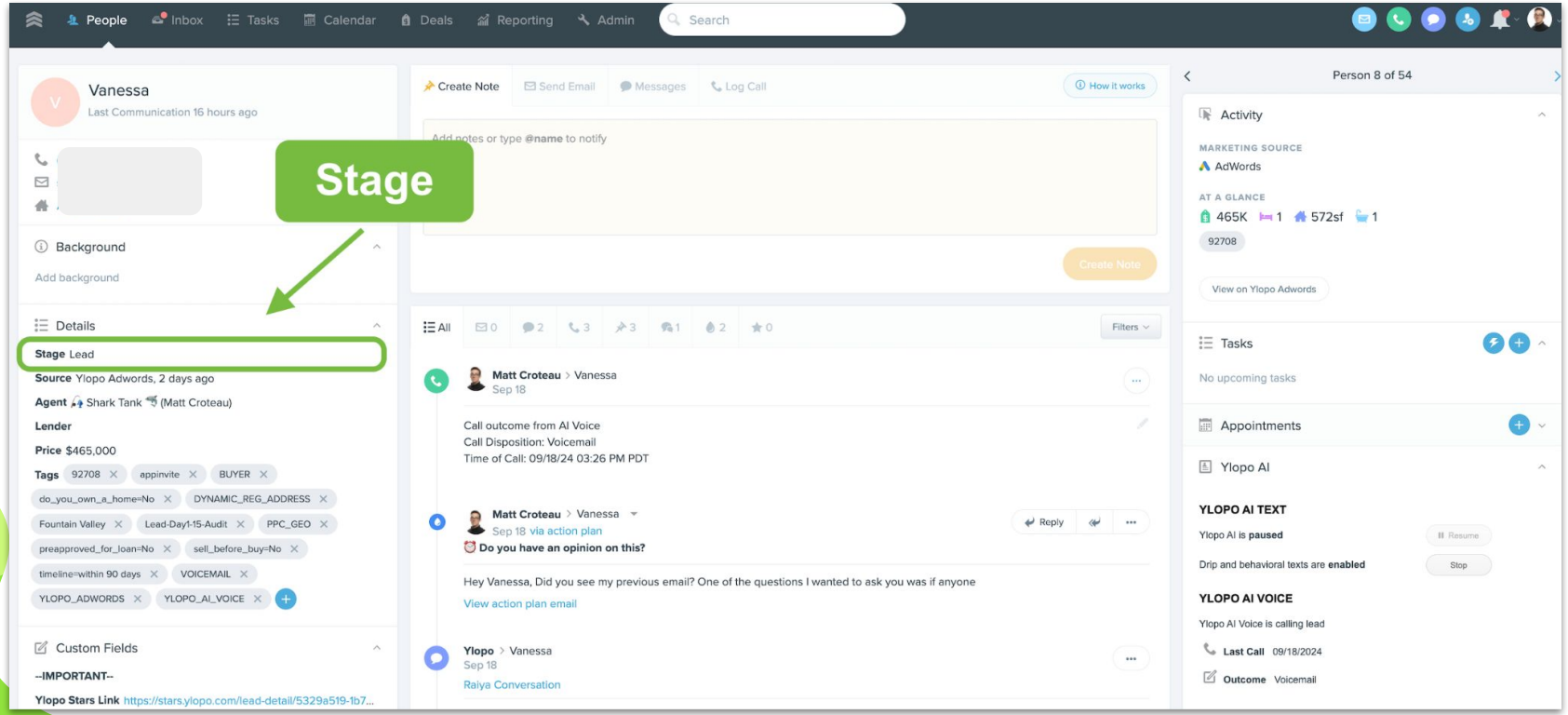
Agents can access Ylopo Stars via Stars Link to manage Ylopo tools

CRM + Ylopo (Stars): Custom Field



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



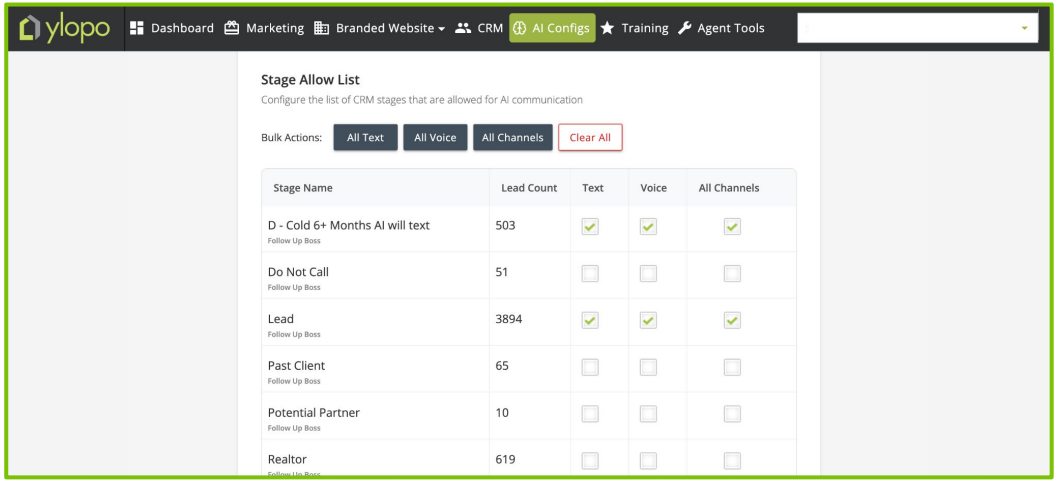
AI blocked or allowed

CRM + Ylopo (Stars): Stage

AI

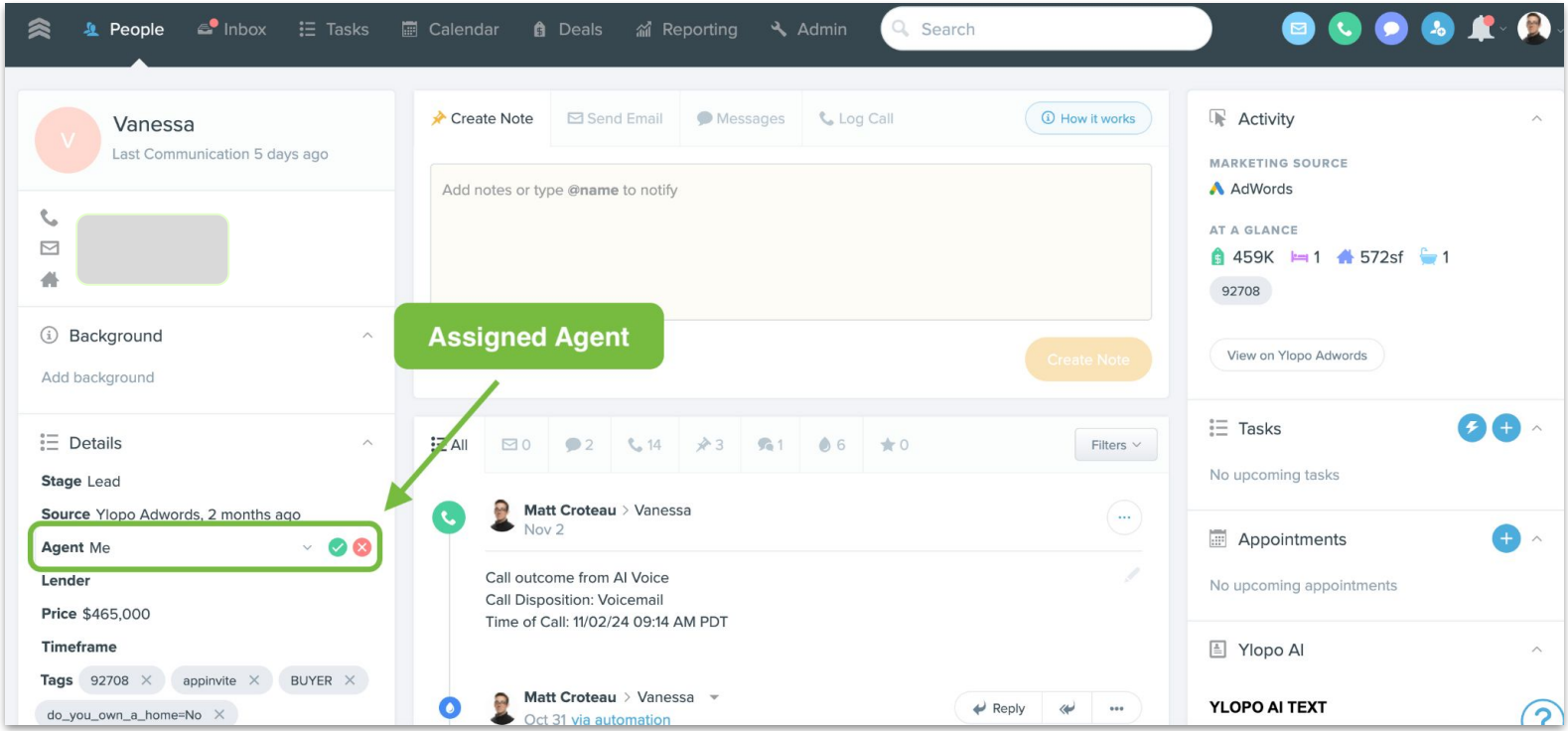
Recommended blocked stages

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



- *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*

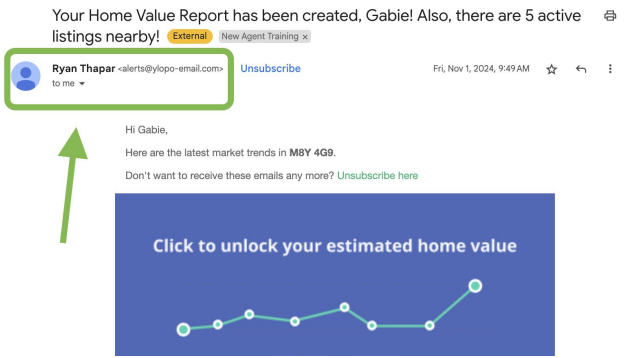
CRM + Ylopo (Stars): Assigned Agent



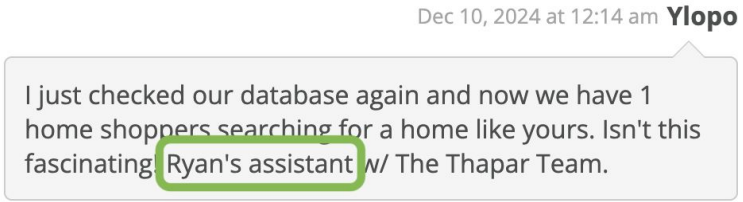
Ylopo Listing and Seller Alerts, Presented by section on Home Search Site

CRM + Ylopo (Stars): Assigned Agent

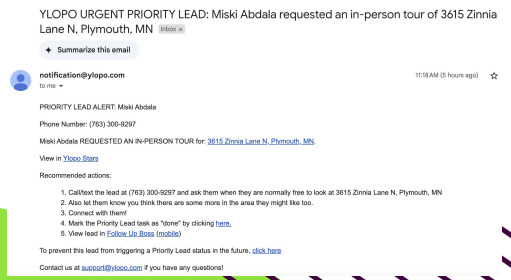
Listing Alerts/Seller Alerts



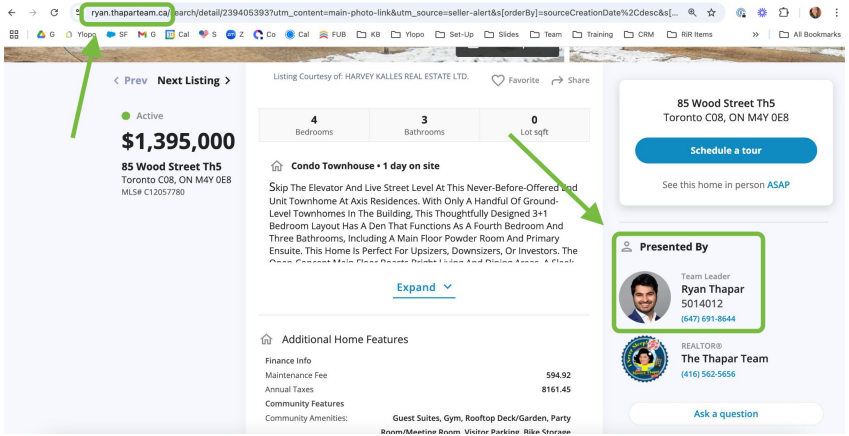
(Optional) AI Text Assistant



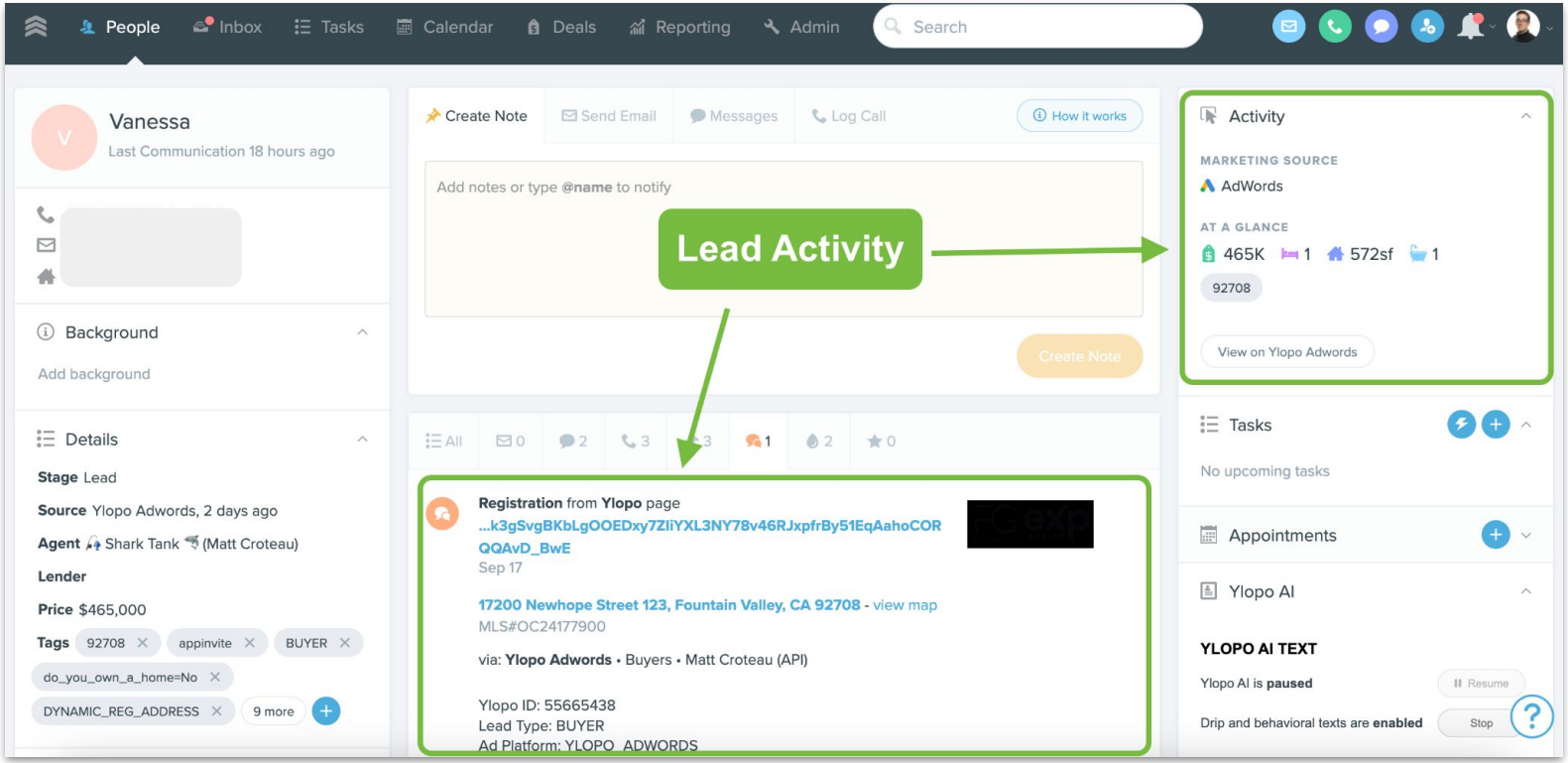
Ylopo Notifications to Agent



(Optional) Agent Home Search Site



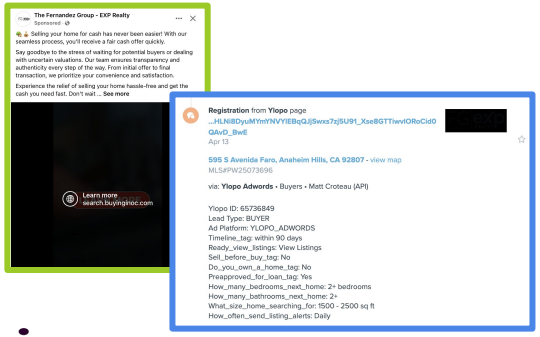
CRM + Ylopo (Stars): Lead Activity



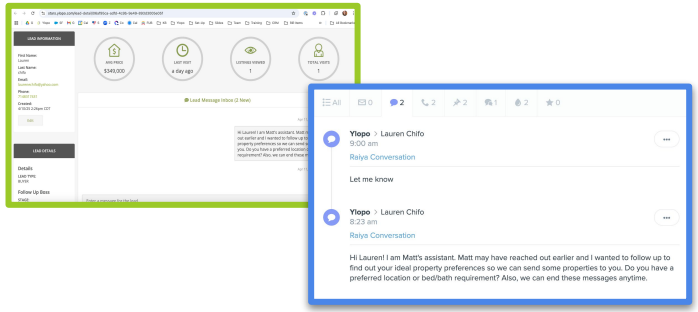
Activity from engagement with Ylopo ads, AI, websites and tools

CRM + Ylopo (Stars): Lead Activity

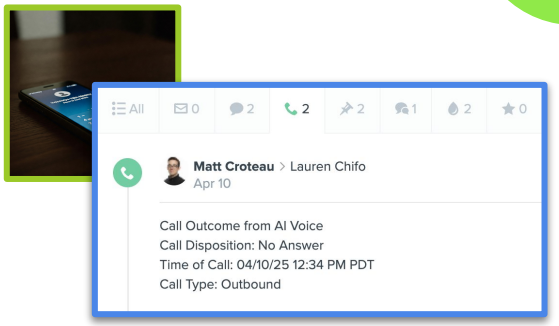
Ad Engagement



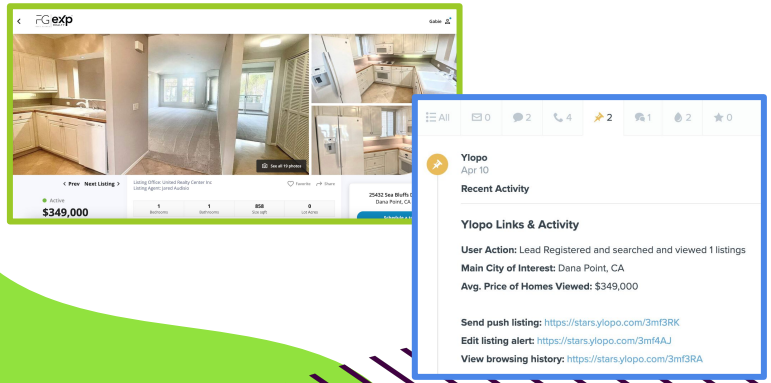
AI Text



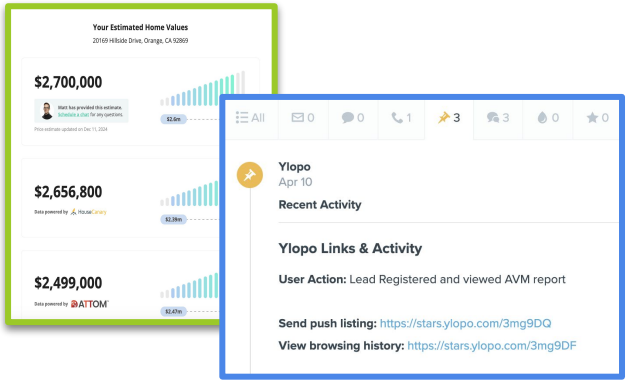
AI Voice



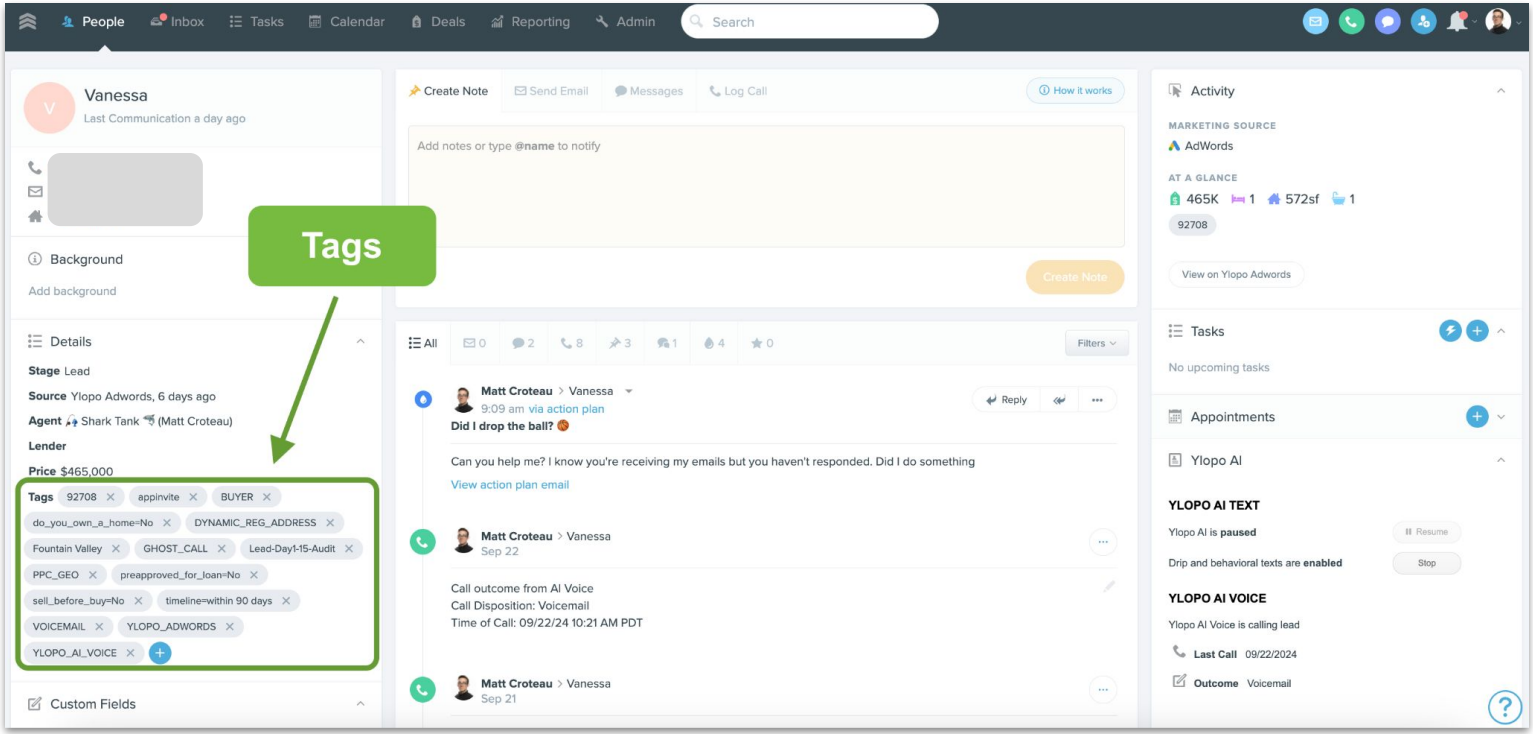
Home Search Site Activity



Seller Report & Listing Alerts



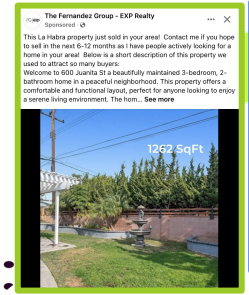
CRM + Ylopo (Stars): Tags

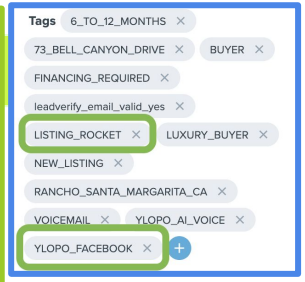


Tags will be utilized to indicate lead activity, AI text, AI Voice dispositions, lead source and more so you can easily filter through your database.

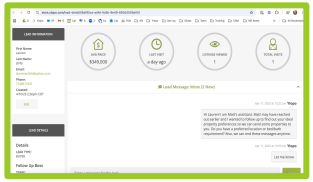
CRM + Ylopo (Stars): Tags

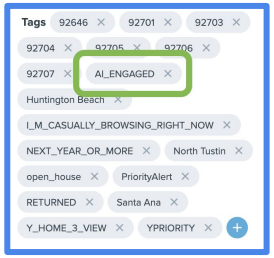
Ad Engagement



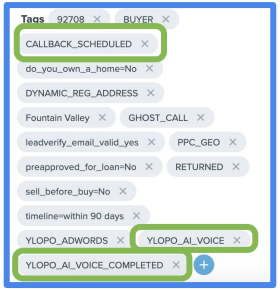


AI Text

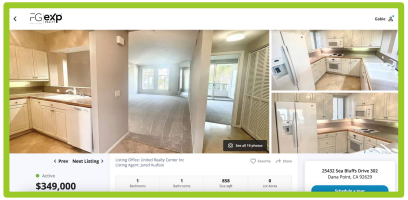


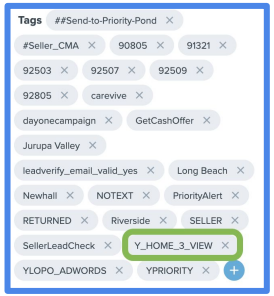


AI Voice



Home Search Site Activity





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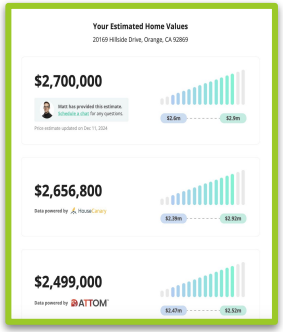
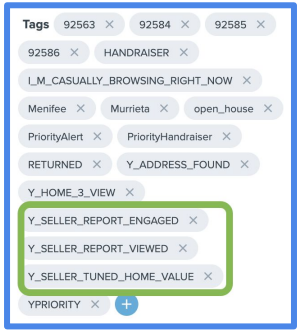
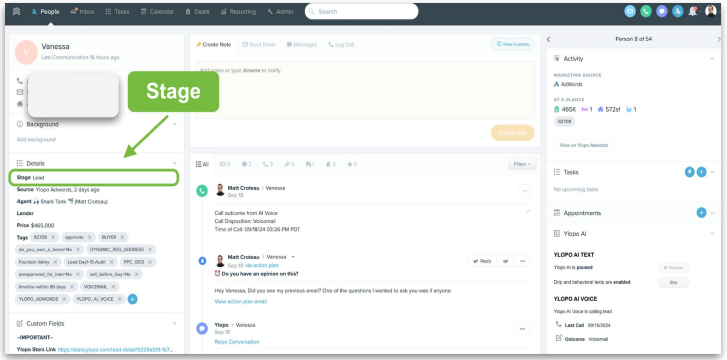
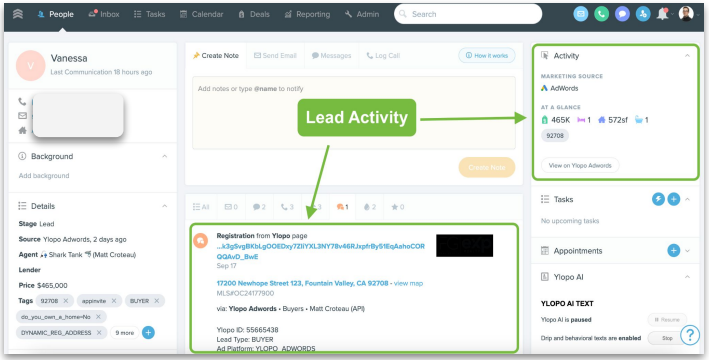




CRM + Ylopo (Stars): Integration Review

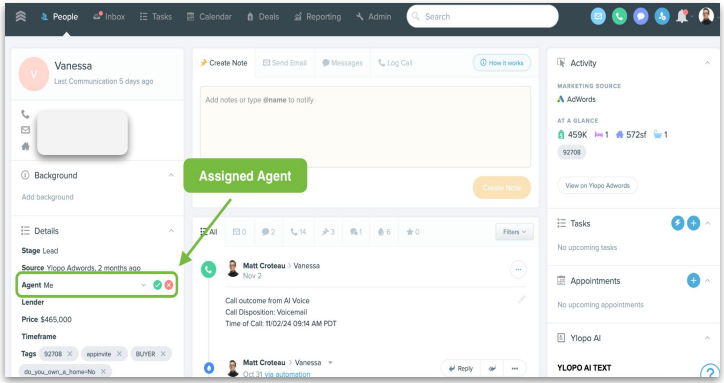
AI blocked or allowed

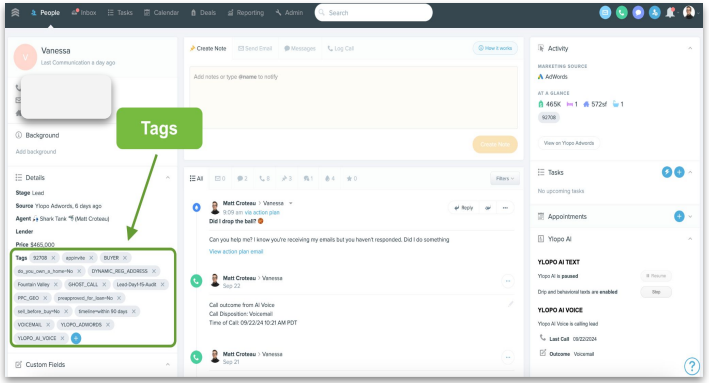


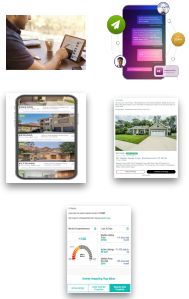


Activity from engagement with Ylopo ads, AI, websites and tools

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







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

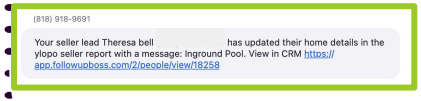
Complete your online training to learn about your specific CRM's integration with Ylopo

Ylopo Notifications to Agents

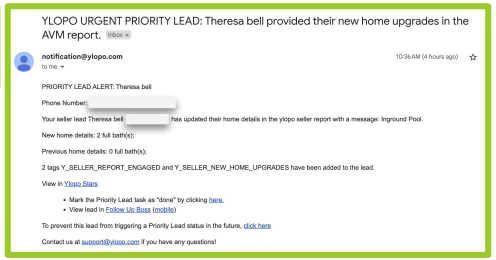
Ylopo Notifications: Priority Notifications

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!

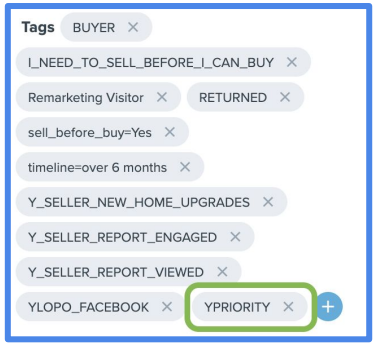
Priority Text sent to agent



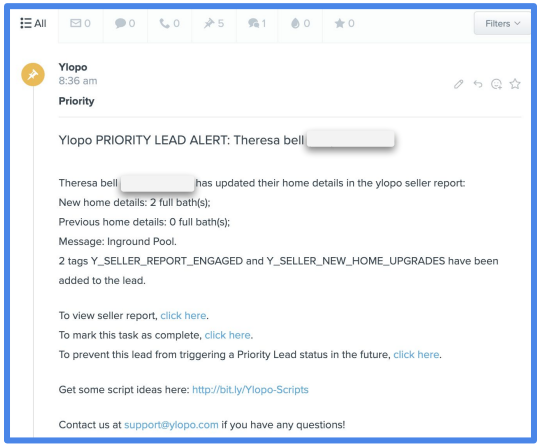
Priority Email sent to agent



YPRIORITY tag added on lead profile



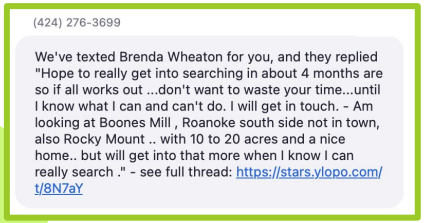
Priority notes added to lead profile in CRM



Ylopo Notifications: Responses to AI Texting

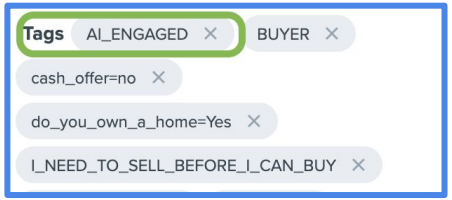
When someone responds to your AI text assistant, the assigned agent will receive a text and an email notification. Within the leads profile in the CRM a relevant AI text tag is applied in the tag section and the conversation is added to activity/notes section.

Text notification sent to agent

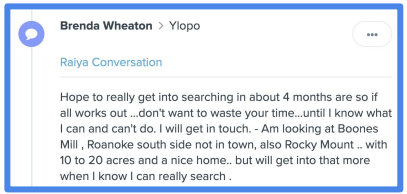


Email notification sent to agent

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...

1. Allows you to shape your business and workflow around what is important to you
2. Leads don't "slip through the cracks"
3. Identify and convert high intent buyers and sellers
4. Provide your clients and potential clients with access to valuable information and tools
5. Nurturing for leads and database in any stage

AND MORE!

CRM

Lofty
kvCORE
Sierra Interactive
LionDesk
follow up boss

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

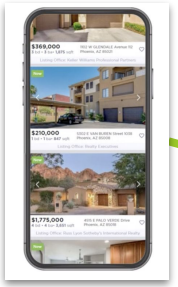
02

Q&A

End

Utilize Ylopo Stars for Lead Engagement and Nurturing

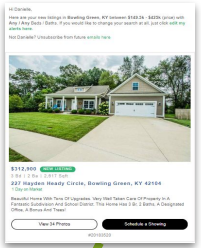
Home Search Site



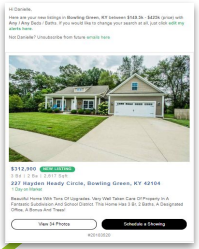
Remarketing

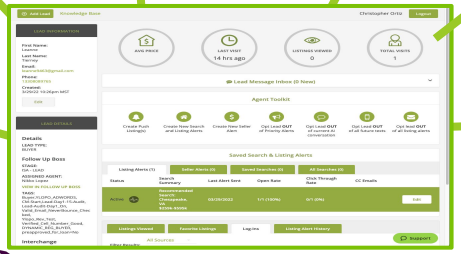
AI Texting

Listing Alerts

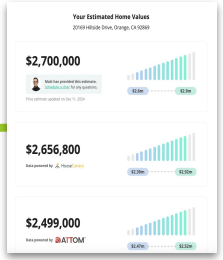


Push Listings





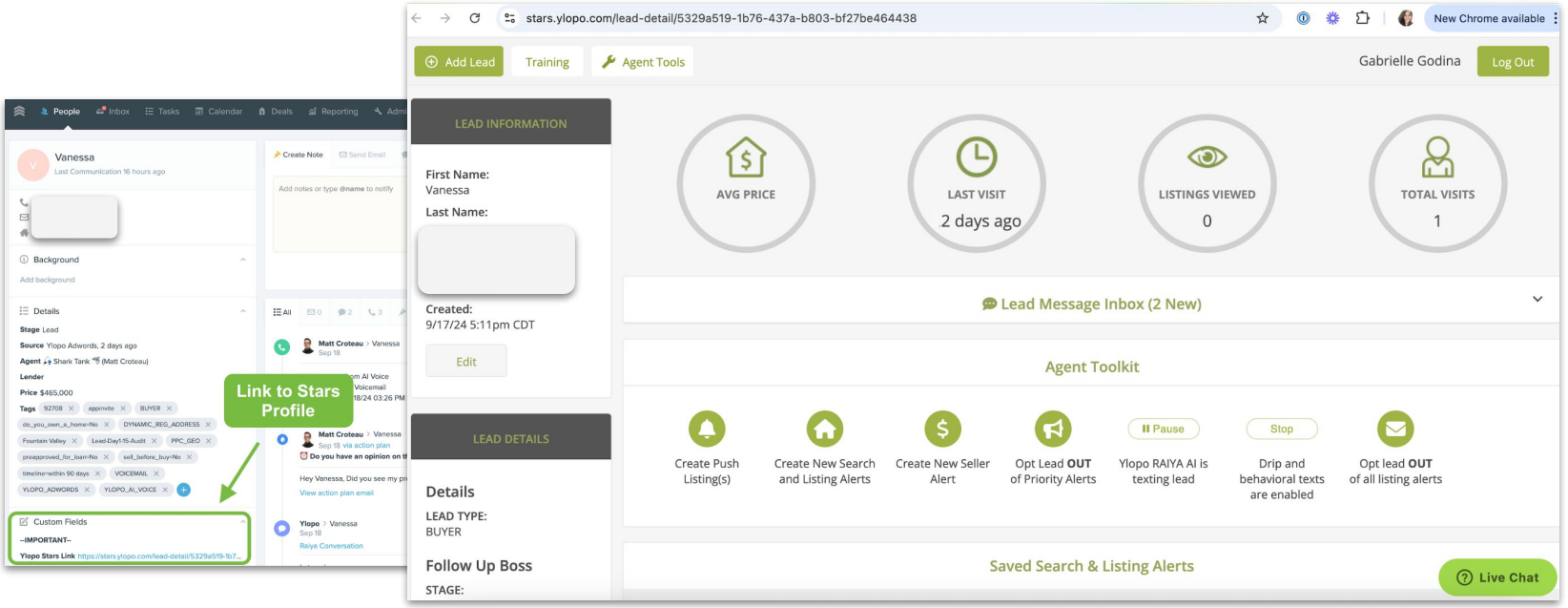
Seller Report



CRM + Ylopo (Stars): Integration

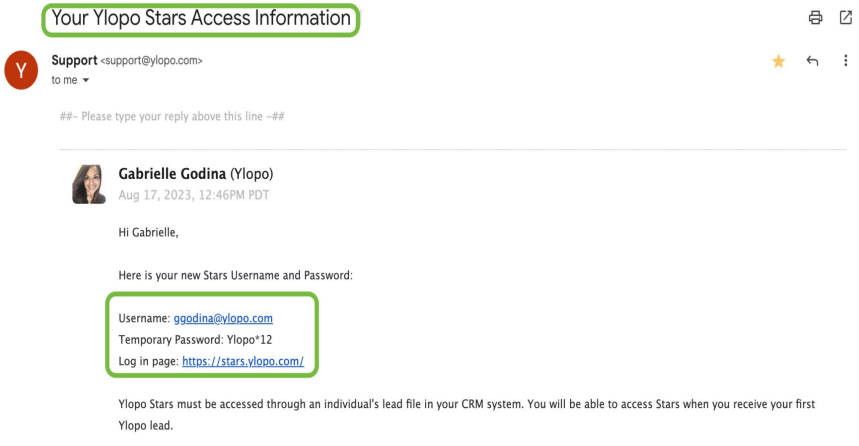
Stars is Ylopo's database marketing tool that integrates with your CRM, giving you a powerful way to engage, nurture and track home buyer and seller activity from your new leads to past clients.

Accessing Stars

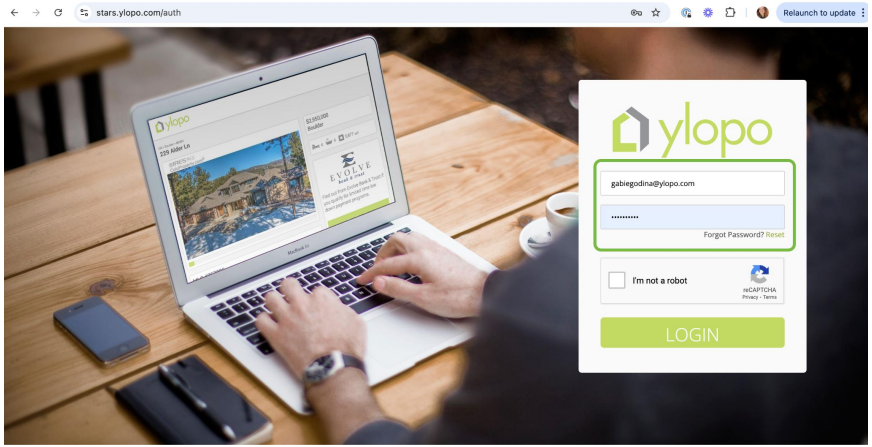


Stars is the control center for a user experience on your home search site. Agents must have a Stars login to access Stars and an Agent subdomain required to be listed on the “Presented by” section on the home search site.

Logging into Stars



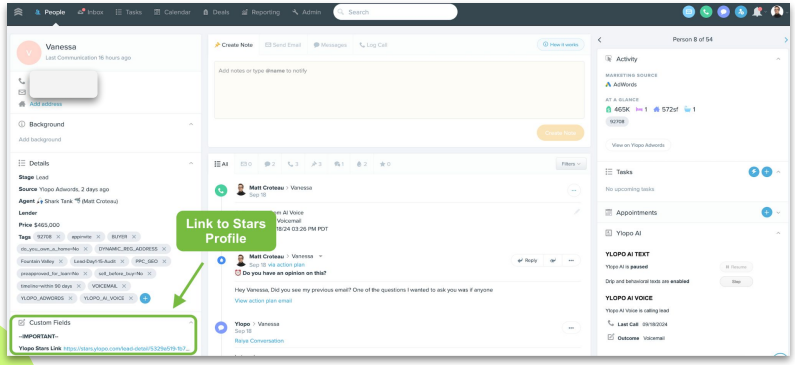
Your Stars login information will be sent to you from Ylopo via email



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

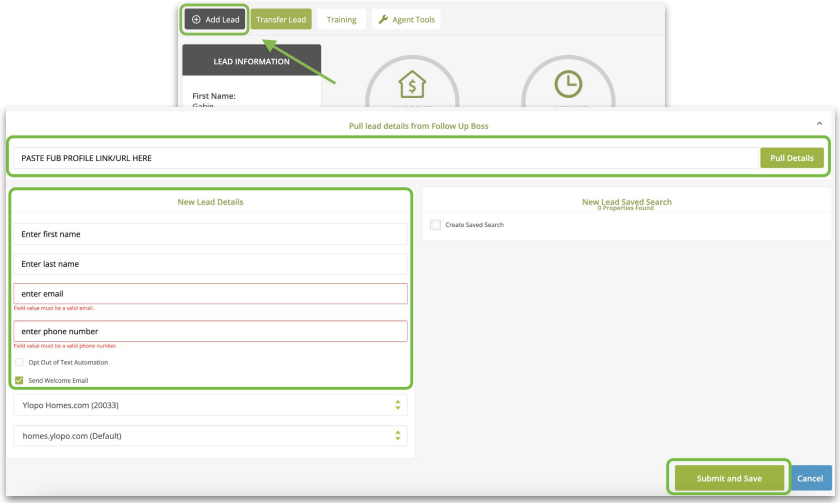
Stars: Manually Add a Lead to Stars

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



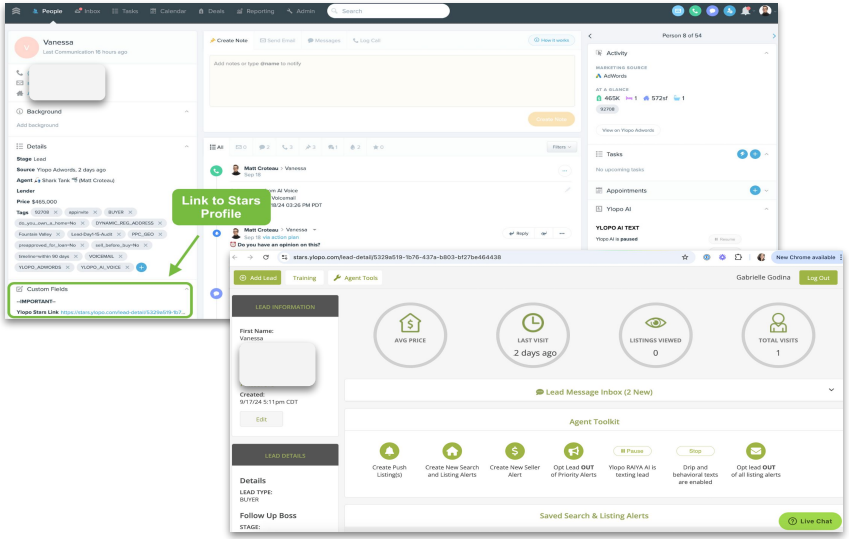
Watch Now

Stars: Remarketing

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

Learn More

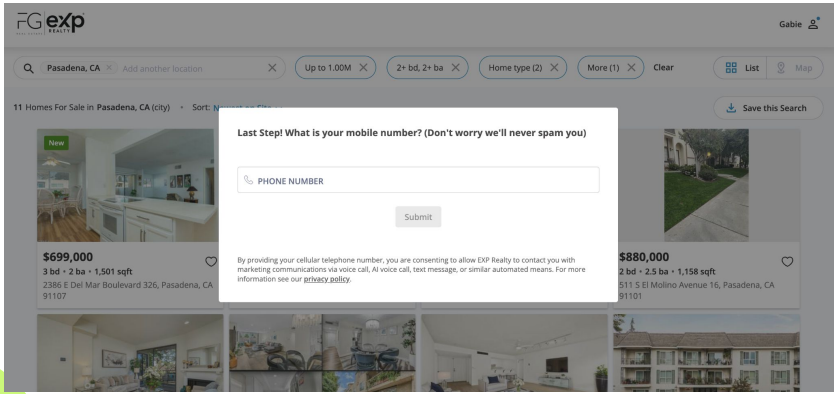
Leads with Stars Profiles/Links are eligible for remarketing.



Watch Now

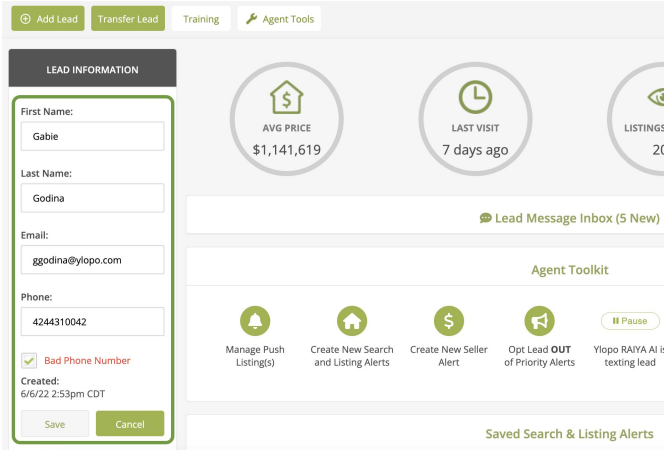
Stars: Lead Information & Bad Number Tool

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



Learn More

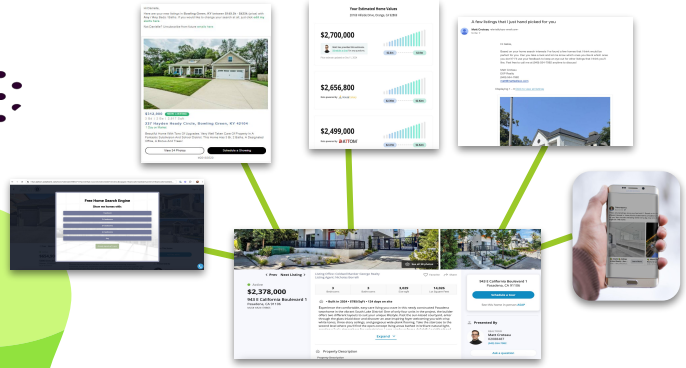
Manage Lead Information in Stars



Watch Now

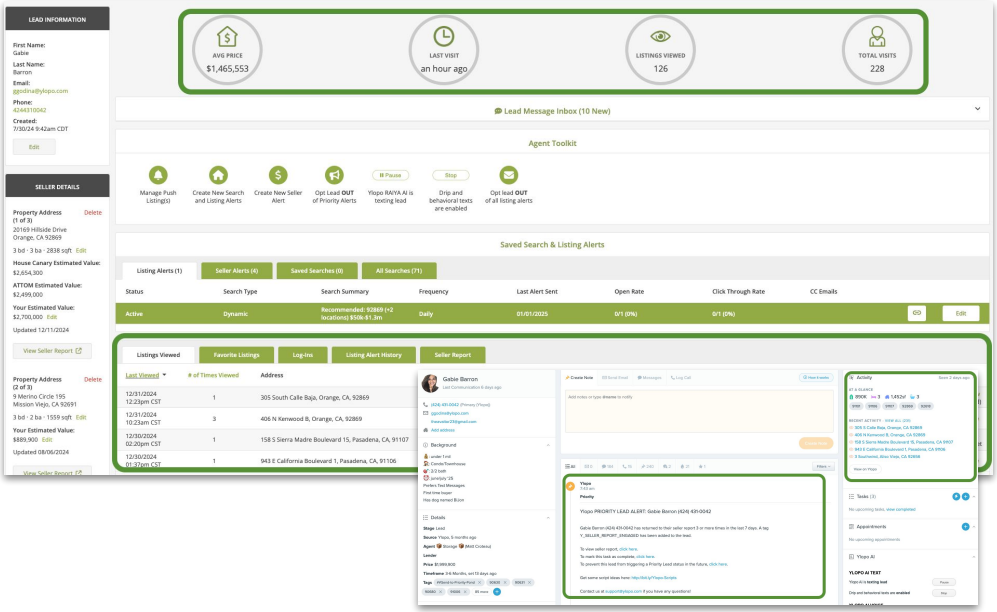
Stars: Home Search Site

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

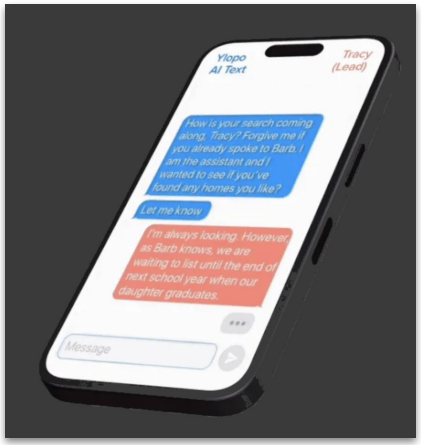
Listing alert, seller alert, AI texting and home search site activity is logged in Stars and added to the leads profile in CRM. You'll be alerted of important activity via Priority alerts.



Watch Now

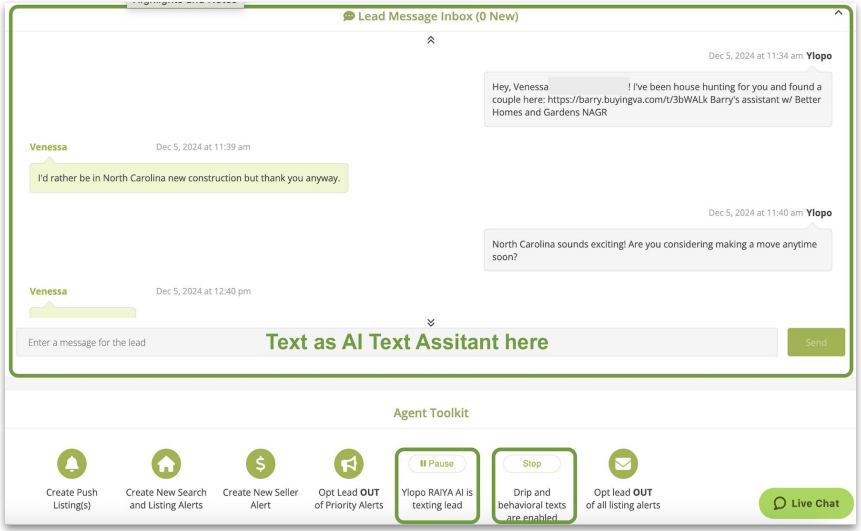
Stars: AI Texting

Leverage your AI text assistant to engage and nurture leads



Learn more

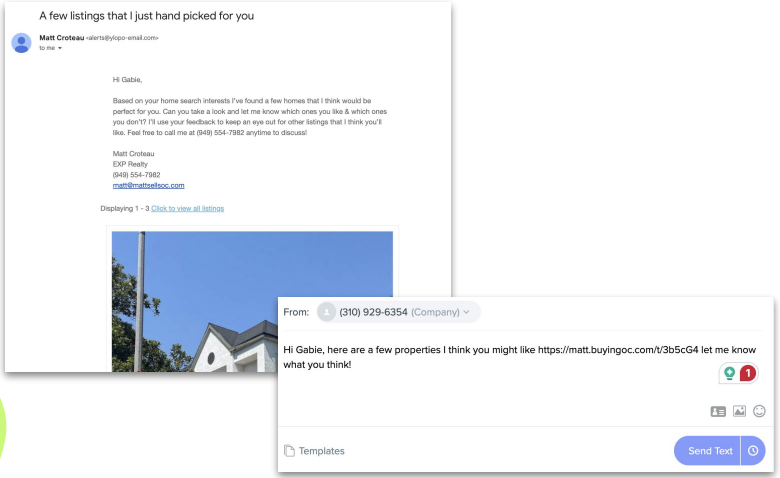
Manage your AI Text Assistant in Stars



Watch Now

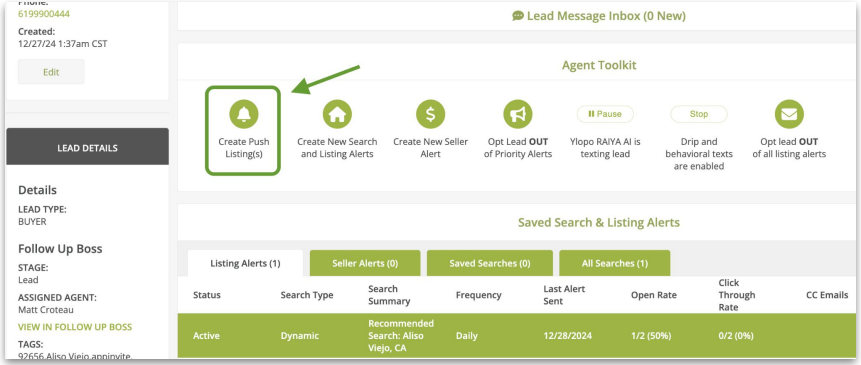
Stars: Push Listings and Push Listing Link

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



Learn More

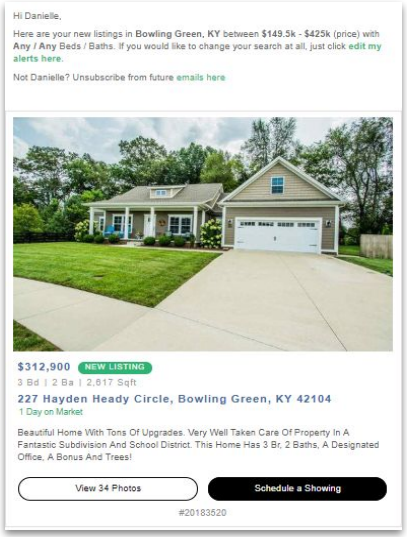
Create and manage Push Listings with the Push Listing Tool in Stars



Watch Now

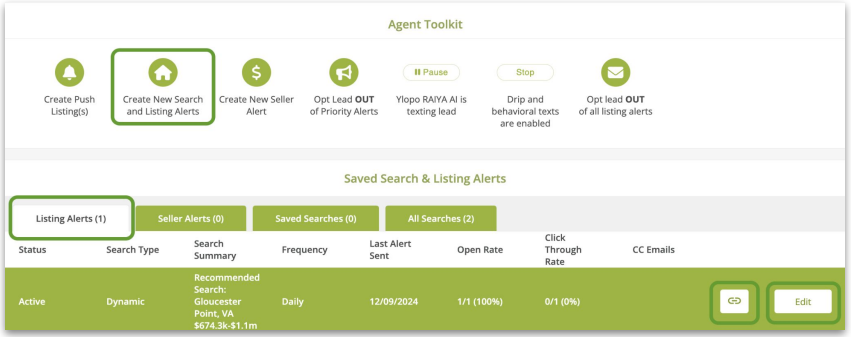
Stars: Listing Alerts and Listing Alert Link

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



Learn more

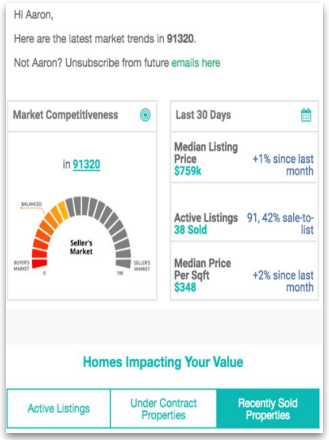
Manage Listing Alerts in Stars

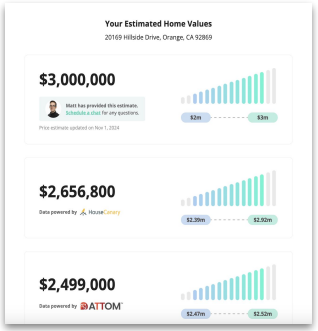


Watch Now

Stars: Seller Alert and Seller Report

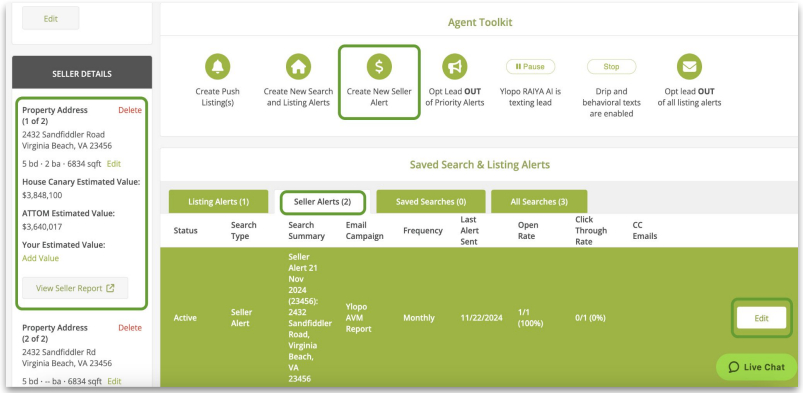
Engage and nurture sellers in your database with local market updates (seller alert) and home equity reports (seller report)





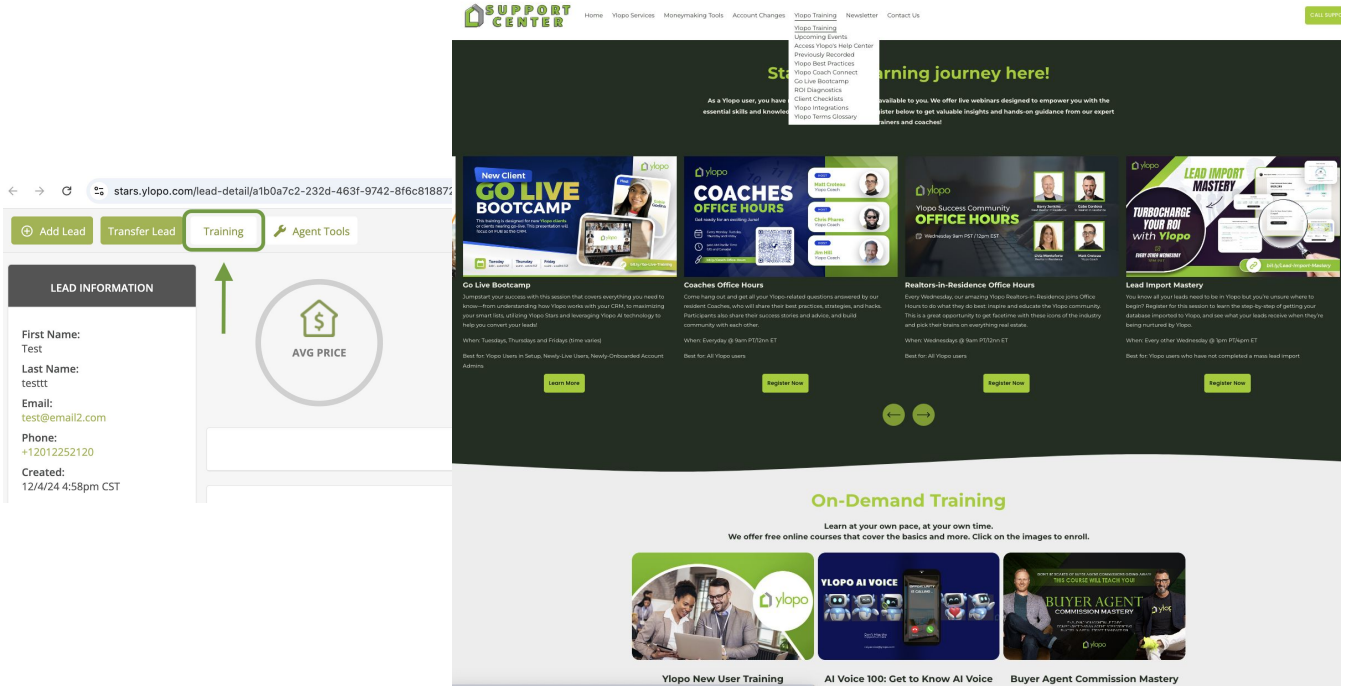
Learn more about seller alerts, seller report (US), Seller Experience (Canada), Understanding the seller report (CAN)

Manage Seller Alerts/Seller Reports in Stars

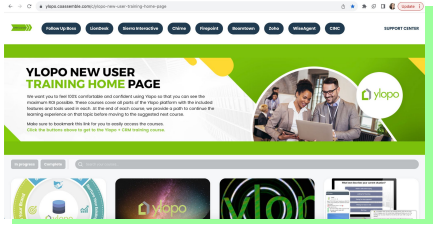


Watch Now

Ylopo Training and Coaching Resources

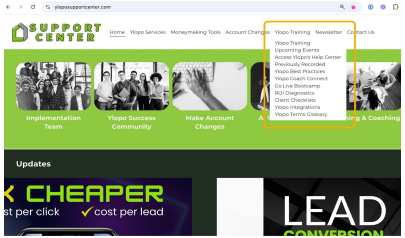


Ylopo Training and Coaching Resources



Online Training Courses

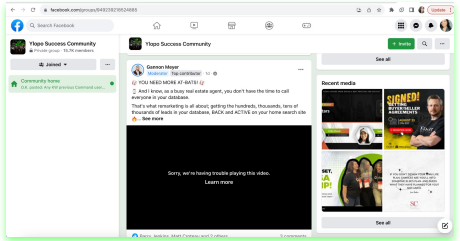
Live Weekly Training



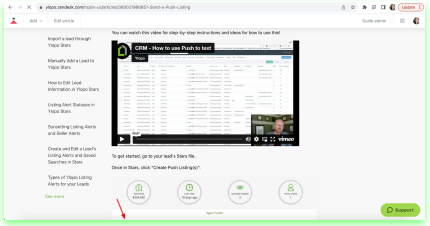
Ylopo Support Center

Realtor in Residence Office Hours

Ylopo Media Center



Ylopo Success Community



Ylopo Knowledgebase

Ylopo Best Practices

yloposupportcenter.com/ylopo-best-practices

SUPPORT CENTER

Home | Ylopo Services | Moneymaking Tools | Account Changes | Ylopo Training | Newsletter | Contact Us

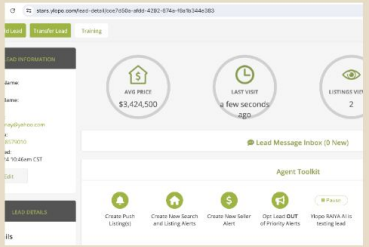
CALL SUPPORT

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!

ylopo