Ylopo New Client Bootcamp



AGENDA

01

02

03

04

PART 1

- YlopoOverview
- Ylopo + CRM Integration

Q&A

Question & Answer/break

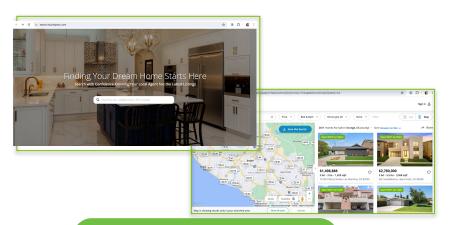
PART 2

- Best practices for converting online leads
- Recommended Smartlists
- Additional training opportunities

Q&A

Question & Answer

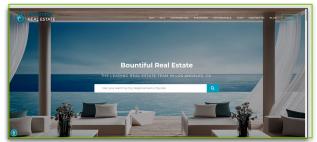
Ylopo Overview



Home Search Site

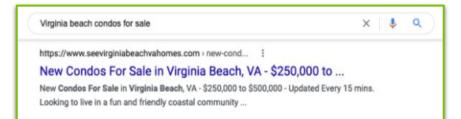
- Ylopo Managed
- Subdomains
- Agent subdomains
- Lead Capture Site
- Website Activity integrated in CRM
- User profiles

Branded Site





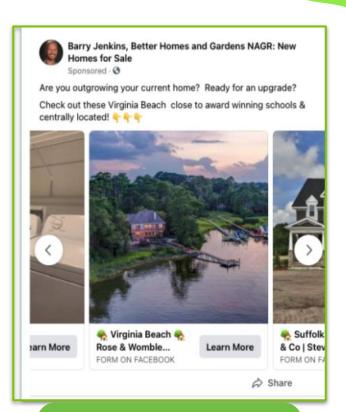
- Squarespace
- Agent/Team Branded Site
- Integrated with Home Search Site
- Ylopo Agent Tools
- Blogs, reviews, communities



Google PPC Ads



Remarketing



Facebook Social Ads



DyVa Ad



Open House Flyer

But we also...

- Provide you with unique branded tools to help you stand out as an agent
- Nurture your leads via property searches, local market reports, AVM reports
- Al texting, Al calling
- Train and coach you on how to build a database of relationships and opportunities using our technology and data
- Continuously improve our technology and lead generation as changes are needed with Real Estate
- And MORE



Identify and convert high intent buyers and sellers

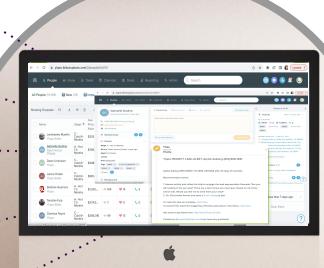
Leads don't "slip through the cracks"

Better online experience for your clients and users

Provide your clients and potential clients with valuable information with tools branded to you and integrated with your CRM

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







AND MORE!

Ylopo + CRM



- Generates online leads using your Ylopo Home Search Site
- Market/AVM Reports
- Listing Alerts
- Website/user activity integrated with CRM
- Ylopo Al texts and calls lead, can be seen inside CRM
- <u>Tags</u> leads in CRM with important information like <u>YPRIORITY</u>
- Training, Coaching, and Strategy Meetings



- Lead Routing
- Assigns Leads
- Stores Leads
- Integrates with Ylopo
- Action Plans
- Automations
- Calls, texts, emails from agent
- Filter/saved/smartlists
- Deal Reporting
- CRM Training

Ylopo + CRM Integration Review

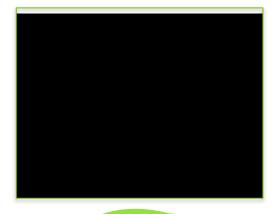
You may visit our Ylopo Help Center on CRM Integration

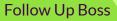
Lead Journey Overview

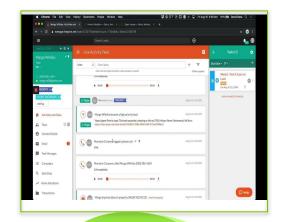


Ylopo leads are delivered into CRM and imported into CRM + Stars









Firepoint



LionDesk

<u>Stages</u>

What are Stages?

Stages group contacts together in buckets to quickly identify the leads. These can be assigned based on different factors, including urgency, the client's phase, and timeframe. Commonly used stages are hot, warm, and cold.

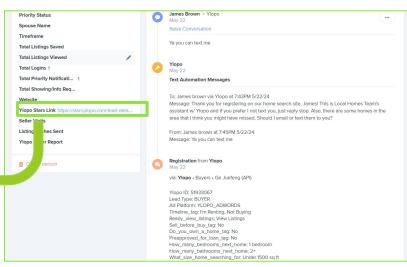
Different CRM use different verbiage:

- Follow Up Boss Stages
- LionDesk Hotness Levels
- Sierra Status
- Firepoint Status
- Boomtown Category
- Lofty (formerly Chime) Opportunities
- Cinc Pipeline

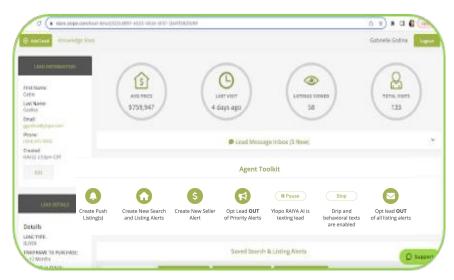


To access <u>Ylopo Stars</u>, go to the person's contact record in FUB and click the Stars link.





Ylopo Stars



Stars must be accessed through a leads profile

- Access your Ylopo Agent Tool Kit
- Customize your lead property searches
- Send multiple or single push listings
- Manage your Al Texting
- View all details of what the lead is doing on your home Search Site





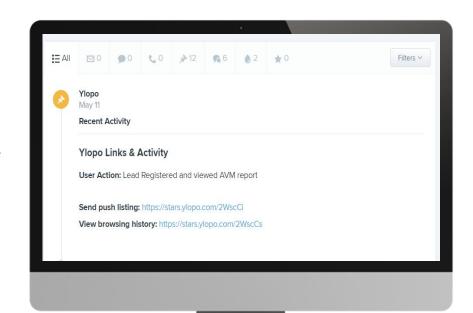
Weekly Live training on Stars



Website Activity



Activity on the <u>Home Search Site</u> is captured in the CRM.

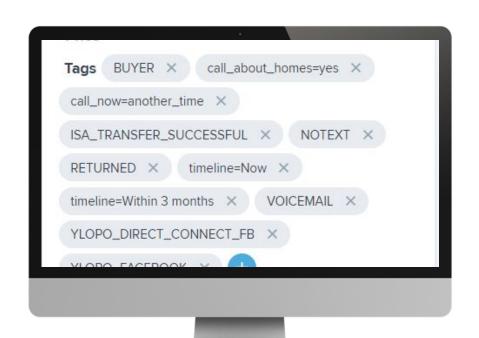






Tags are added to give you relevant information about the lead's behavior. Providing you insight into where the leads originated, their demographics, and how they are engaging with your site. These tags help you to keep your leads organized and your outreach consistent.

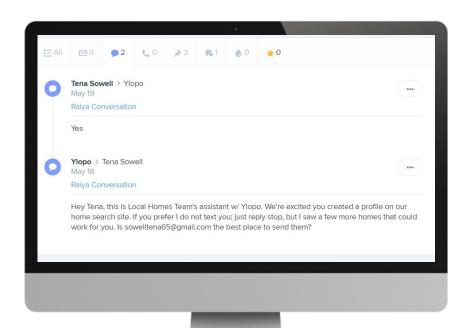
Click <u>here</u> to learn more about Tags and the <u>YPRIORITY</u> tag.

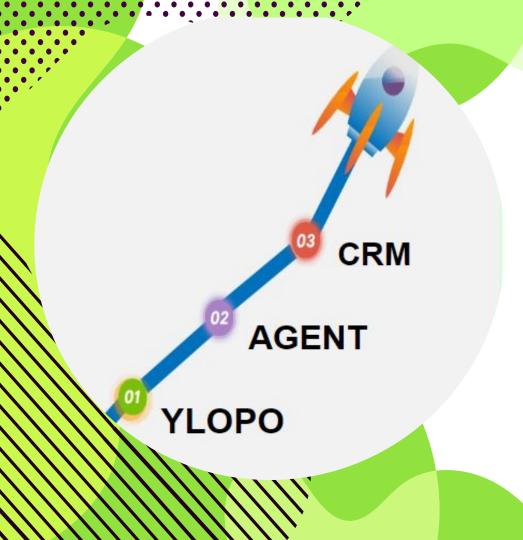






Ylopo Al texting is a powerful and dynamic tool that can be used to automatically facilitate communication, nurturing and conversion of your leads within your CRM. When Al texting is turned on for your leads the generated texts will appear in the lead activities as Notes.





Ylopo + CRM Ultimate Goal

Help you 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.

Q&A / Break

Up Next:

Working your leads in your CRM utilizing Saved Filters and Ylopo Stars tools

QUESTIONS ?

This Concludes 1 of 2 Part Ylopo Boot Camp Training

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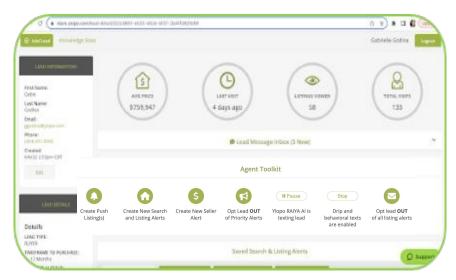
Question & Answer

Lead Journey Overview



Ylopo leads are delivered into CRM and imported into CRM + Stars

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Weekly Live training on Stars

Add Users Into Stars



Used when adding one or a couple of leads into Ylopo Stars.



Import

Mass Lead Imports allow you to import a large database of leads into Ylopo Stars.



Mass Lead Import Request Form

Best Practices for Using Stars

- Taking over AI Text conversations
- Using the push listing tool to engage leads
- Sending past clients and home owners the seller report/seller alert
- Editing and creating searches based on client needs
- Adding all non-Ylopo leads/contacts to Stars for remarketing (MLI, auto import)

Working Your Leads

What are Smart Lists?

Smart Lists are the saved filters in your CRM used to identify the group of leads that require attention. Create your Smart list by using filters and sorting. These can be created based on multiple filters; some suggestions include tags, stages, last outreach, etc. These automatically refresh and the best practice is to work on your lists daily. The order of priority for Smart lists can be different based on personal preference and how you set up your stages.

Links for Resources:

- Recommended Ylopo Smart Lists
- Al Voice Smart Lists
- Smart List (Direct Connect Lead Sources)

Best Practices for Converting Online Leads

- Log all communication in/through CRM
- Calling prospects more than 1x, leads can take anywhere from 6-14 times to get a response
 - This is why AI Voice and AI Text is a no-brainer!
- Working your smartlists daily! We will review our best practice smartlists together but you will find our own flow and business needs as you begin to learn these systems
- Prospect daily! Each day Ylopo is delivering and nurturing your leads and you could potentially be missing opportunities within your CRM
- Attend our endless training and coaching opportunities, take advantage of your new network of Ylopo users who are finding success with the system
- Have a close relationship with your CSM

Prospecting Scripts

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

Next recommended training



Training and Coaching

Resources









Online Training Courses

Live Weekly Training

Live Coaching

Realtor in Residence Office
Hours







Ylopo Success Community



Ylopo Knowledgebase

QUESTIONS ?

THANK YOU!

