

ylopo

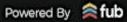
SUCCESS SUMMIT CHARLESTON



April 23rd and 24th 2025



95 Calhoun St Charleston SC 29401



Ylopo New Client Bootcamp



New Ylopo Client Training Guide

Self Paced Training















Ylopo Stars

Ylopo Marketing For You

Home Search Site

Ylopo Branded Sites

Live Training







Implementation: License Launch, CRM + Ylopo Integration



Onboarding: Additional tools and systems training for lead conversion

New Ylopo Agent Training Guide

Self Paced New User Training



Live Training



Getting started with Ylopo



Engage and nurture database using Stars



Additional tools and systems training for lead conversion

AGENDA

01

01

02

02

PART 1

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

Q&A

Break

PART 2

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

Q&A

End

Building a Successful CRM database to nurture and convert

CRM



- Choose a CRM that fits your goals and needs
- Set KPIs
- Clean and segment your database
- Create a nurture strategy
- Optimize your workflows
- Automate tasks
- Integrate your CRM with marketing tools
- Continuously optimize

Agent



- Lead Management
- Qualifying Leads
- Building Relationships
- Educating and Advising
- Driving Conversion
- Follow-Up
- Leveraging CRM and Marketing Tools
- Post-Conversion Engagement
- Continuous training

Ylopo



- Lead Generation
- Al Text and Voice Assistant
- Retargeting
- IDX Home Search Site
- Stars platform: Agent Tools to nurture
- Branded site: Agent Tools to convert
- Priority Notifications
- Training and Coaching on Ylopo tools and conversion

CRM







Ylopo



CRM + Agent +

Ylopo

We help you turn more leads into clients and get the most out of your CRM.

With smart workflows and processes, consistent branding and engagement, and timely and value-adding follow-ups, you'll stay on top of every step in the sales journey.

Ylopo + CRM Integration Review

Visit our Ylopo Help Center on CRM Integration

CRM + Ylopo Integration



- 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

- Online Lead Generation
- Al Text Assistant
- Al 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

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

<u>Visit our Help Center for more articles on the CRM + Ylopo integration</u>

CRM + Ylopo (Stars) Integration: New Buyer Lead Journey

Facebook Social Ads



or



Google PPC Ads

Home Search Site Registration



Lead Delivered to CRM



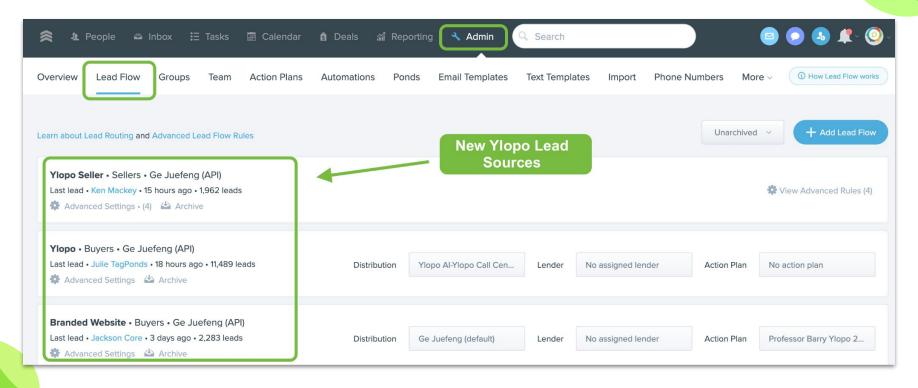
Imported into Ylopo Stars





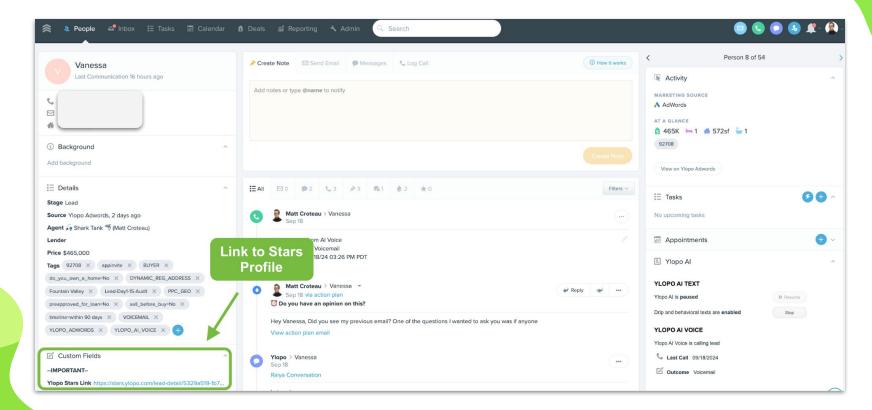


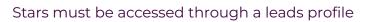
CRM + Ylopo (Stars) Integration Review



Ylopo will only set up lead distribution for Al Voice eligible lead sources based on your Al Voice set up.

CRM + Ylopo (Stars) Integration Review

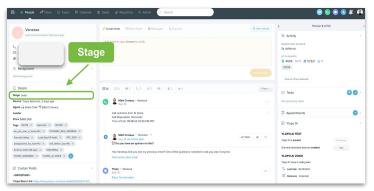


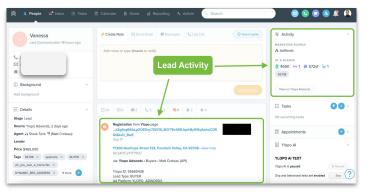


CRM + Ylopo (Stars) Integration Review



Al blocked or allowed





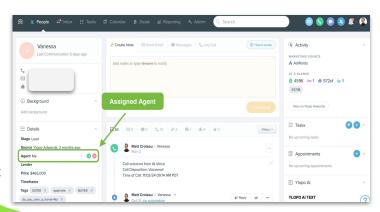


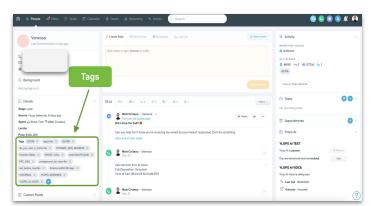
Activity from engagement with Ylopo ads, Al, websites and tools



Ylopo Listing and Seller Alerts,

Presented by section on Home Search









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

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!

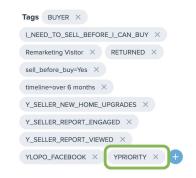
Priority Text sent to agent

If Theresa bell has updated their home details in the port with a message: Inground Pool. View in CRM https://

Priority Email sent to agent

	YLOPO URGENT PRIORITY LEAD: Theresa bell provided their new home upgrade AVM report. $\space{1mm}$							
•	notification@ylopo.com to me ▼	10:36 AM (4 hours ago)	1					
	PRIORITY LEAD ALERT: Theresa ball							
	Phone Number:							
	Your seller lead Theresa bell has updated their home details in the ylopo seller report with a message: Ing	round Pool.						
	New home details: 2 full bath(s);							
	Previous home details: 0 full bath(s);							
	2 tags Y_SELLER_REPORT_ENGAGED and Y_SELLER_NEW_HOME_UPGRADES have been added to the lead.							
	View in Ylopo Stars							
	Mark the Priority Lead task as "done" by dicking here. View lead in Editor Up Boss (mobile)							
	To prevent this lead from triggering a Priority Lead status in the future, <u>plick here</u>							
	Contact us at support@vinco.com if you have any questional							

YPRIORITY tag added on lead profile



Priority notes added to lead profile in CRM

≣ All	☑ 0	• 0	C 0	≯ 5	% 1	0	★ 0			Filters V
	Ylopo 8.35 am ∅ ♭ ℚ ☆ Priority ∅									
	Ylopo PRIORITY LEAD ALERT: Theresa bell									
	Theresa I	bell		has upd	ated their	r home de	etails in the	ylopo seller re	eport:	
	New home details: 2 full bath(s);									
	Previous home details: 0 full bath(s);									
	Message: Inground Pool.									
	2 tags Y_SELLER_REPORT_ENGAGED and Y_SELLER_NEW_HOME_UPGRADES have been									
	added to the lead.									
	To view seller report, click here.									
	To mark this task as complete, click here.									
	To prevent this lead from triggering a Priority Lead status in the future, click here.									
	Get some script ideas here: http://bit.ly/Ylopo-Scripts									
	Contact us at support@ylopo.com if you have any questions!									



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

(424) 276-3699

We've texted Brenda Wheaton for you, and they replied "Hope to really get into searching in about 4 months are so if all works out ...don't want to waste your time...until I know what I can and can't do. I will get in touch. - Am looking at Boones Mill , Roanoke south side not in town, also Rocky Mount .. with 10 to 20 acres and a nice home. but will get into that more when I know I can really search ." - see full thread: https://stars.ylopo.com/158N7aY

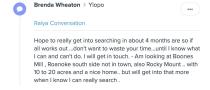
Email notification sent to agent



Al Text Tag added to CRM profile



Conversation added to lead profile in CRM



Ylopo Best Practice Workflows for 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 Text Replies -

- Stage includes: Lead
- Tags include:
 AI_ENGAGED,
 AI_NEEDS_FOLLOW_UP
- Last Communication > than
 1 day ago

4) Lead Active

- Stage includes: Lead
- Last Visit < 7 Days ago
- Last Communication > than 7 days ago

5) Nurture Active

- Stage includes: Hot, Warm, and Cold, Past Client
- Last Visit < 7 Days ago
- Last Communication > than 7 days ago

View the recommended lists here

Ylopo Best Practice for Nurture

1) Hot 1x/wk

- Stage: Includes Hot
- Last communication > 1 week

3) Cold 1x/mo

- Stage: Includes Cold
- Last communication > 30 days

2) Warm 2x/mo

- Stage: Includes Warm
- Last communication > 2 weeks

4) Closed/Past 1x/q

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

View the recommended lists here

Ylopo Additional Smartlists

Al Voice Follow Up -

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

Seller Engagement -

- Tags include:
- Y_SELLER_REPORT_VIEWED
- Y_SELLER_REPORT_ENGAGED

No Stars Links -

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

 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...



QUESTIONS?

This Concludes 1 of 2 Part Ylopo Boot Camp Training

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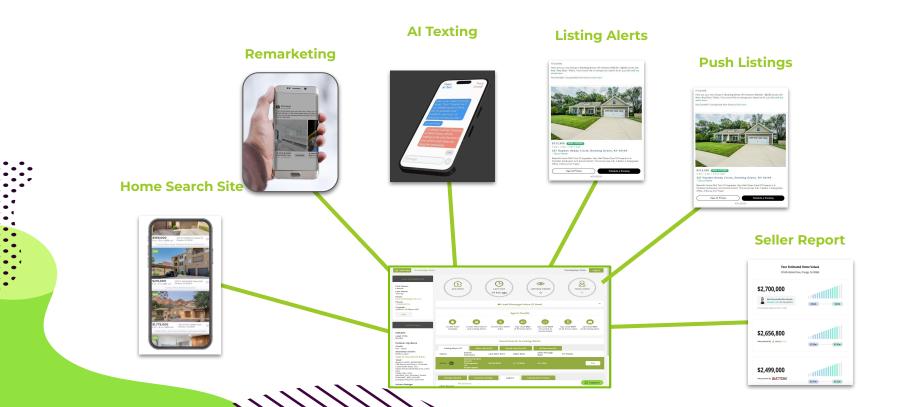
PART 2

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

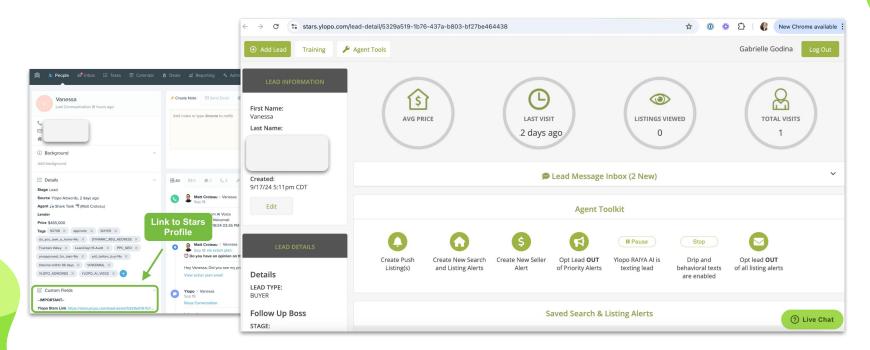
Q&A

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Utilize Ylopo Stars for Lead Engagement and Nurturing

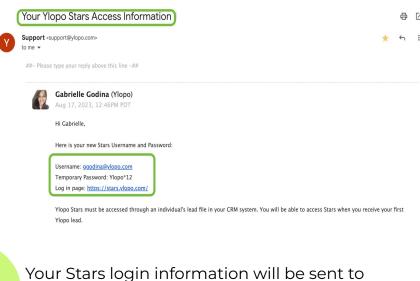


Accessing Stars

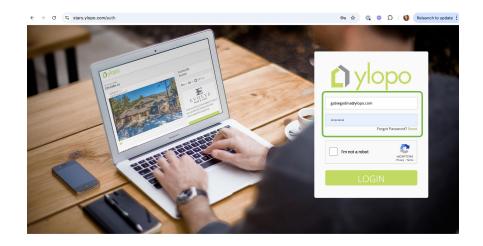


Stars is the control center for a user experience on your home search site. Agents must have a Stars login to access Stars and an Agent subdomain required to be listed on the "Presented by" section on the home search site.

Logging into Stars



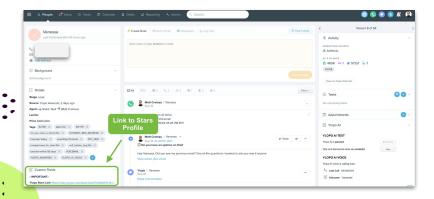
Your Stars login information will be sent to you from Ylopo via email



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

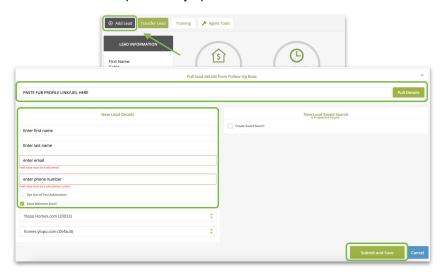
Stars: Manually Add a Lead to Stars

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



Learn More

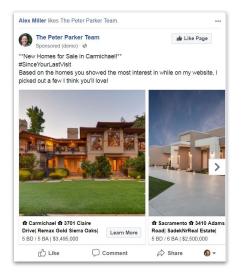
Add a lead via Add Lead button in Stars or visit https://stars.ylopo.com/lead-detail/add





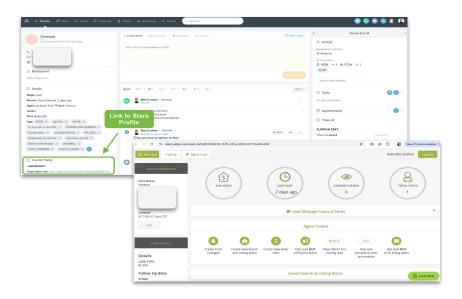
Stars: Remarketing

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



Learn More

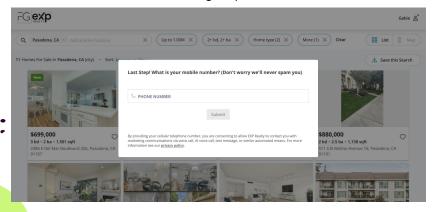
Leads with Stars Profiles/Links are eligible for remarketing.





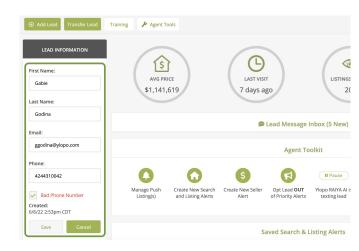
Stars: Lead Information & Bad Number Tool

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



Learn More

Manage Lead Information in Stars





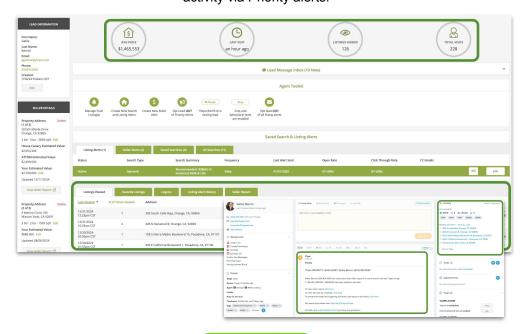
Stars: Home Search Site

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.





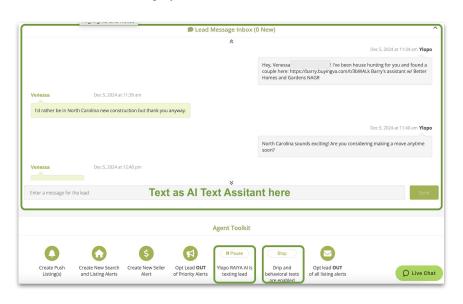
Stars: Al Texting

Leverage your AI text assistant to engage and nurture leads



Learn more

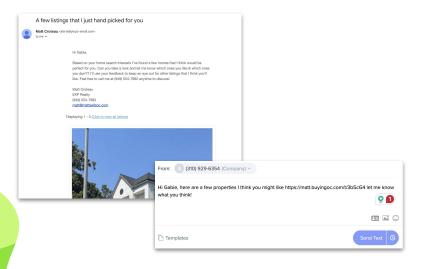
Manage your AI Text Assistant in Stars





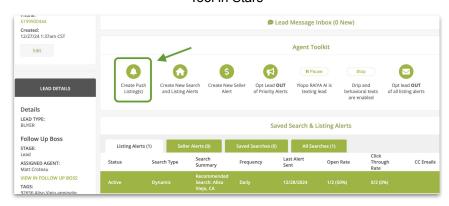
Stars: Push Listings and Push Listing Link

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



Learn More

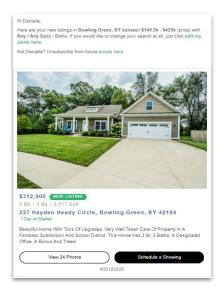
Create and manage Push Listings with the Push Listing Tool in Stars





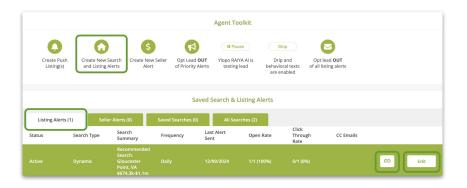
Stars: Listing Alerts and Listing Alert Link

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



Learn more

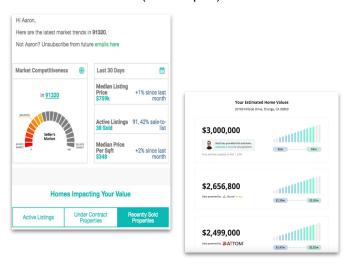
Manage Listing Alerts in Stars





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)



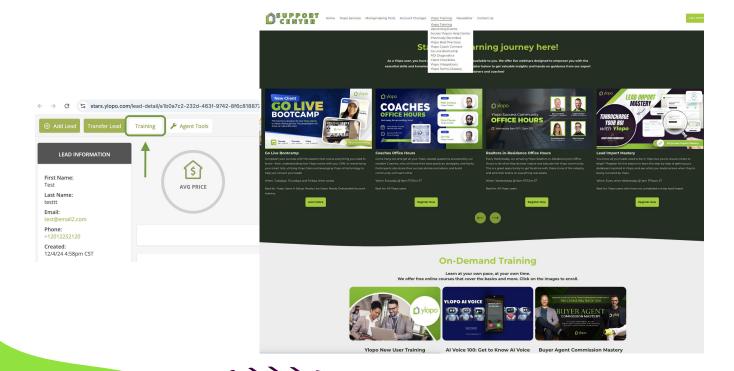
Learn more about seller alerts, seller report

Manage Seller Alerts/Seller Reports in Stars





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



Ylopo 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

THANK YOU!

