PREPARE TO LAUNCH WITH YLOPO

Get an overview & guide on what it means to “go live.”

EVERY OTHER WEDNESDAY
AT 12PM PST

bit.ly/YourYlopoAccountGoesLive

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 (Admins)

Self Paced Training

Welcome to Ylopo

Ylopo Stars

Mission Control

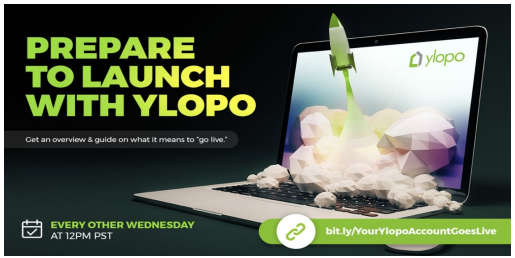
Ylopo Marketing For You

Home Search Site

Ylopo Branded Sites

Ylopo & Lofty (formerly Chime)

Live Training



✅ Implementation:
License Launch, CRM + Ylopo Integration

✅ Post Launch:
CRM + Ylopo, Ylopo Stars

✅ Onboarding:
Additional tools and systems training for lead conversion

New Ylopo Agent Training Guide (Team Members)

Self Paced New User Training

Live Training

Intro to Ylopo

Engage and nurture database using Stars

Additional tools and systems training for lead conversion

Agenda

- ✓ High Level Overview of (Go Live) Launch with Ylopo
- ✓ CRM, Agent and Ylopo roles
- ✓ Ylopo + CRM Integration
- ✓ Prep for Mass Lead Import and Seller Import
- ✓ Next Steps and Client Recommendations

Ylopo Go Live/Launch Overview

- ❑ Ylopo Onboarding
- ❑ Marketing Ads
- ❑ Home Search Site
- ❑ Stars
- ❑ AI Texting/AI Voice
- ❑ Mission Control
- ❑ Coaches Office Hours

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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

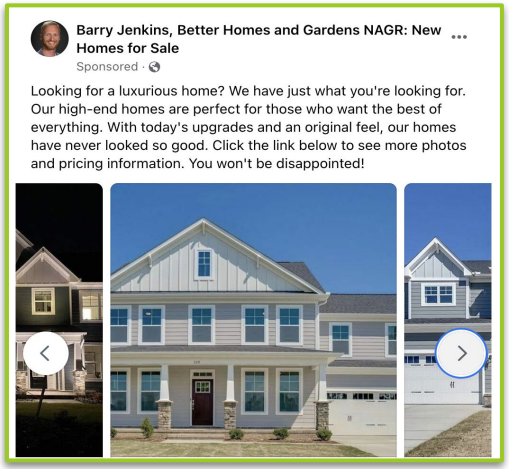
- Stars to engage
- Seller Suite
- Database Imports
- Agent Transitions Made Simple

Onboarding 3: Maximizing Your Toolkit

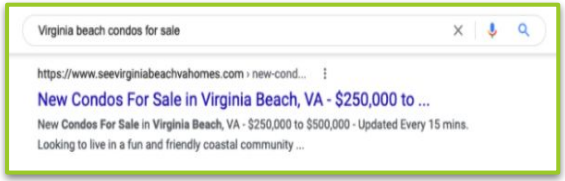
- Agent Power Tools
- AI Performance Review
- Support at Your Fingertips
- Optimization

Please attend these meeting for optimal account set up!

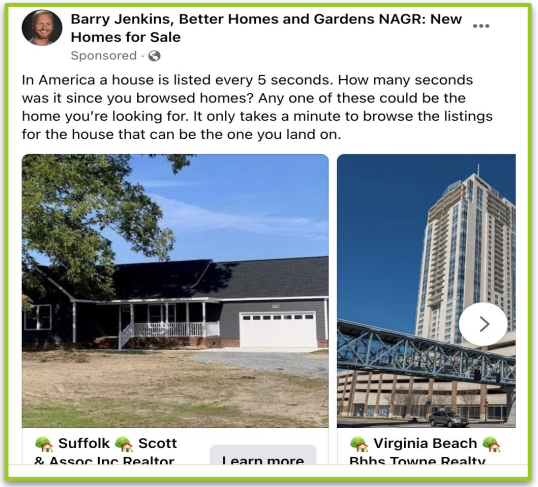
Marketing: Your Ylopo ads are live!



Social Marketing



Google PPC



Remarketing

Marketing is live for lead generation, remarketing live to retarget leads

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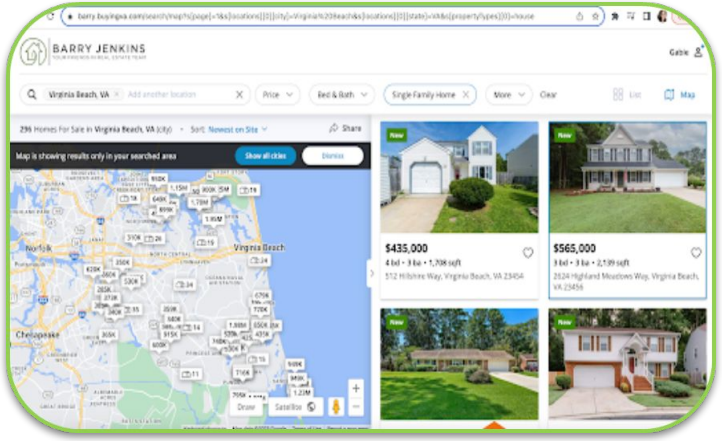
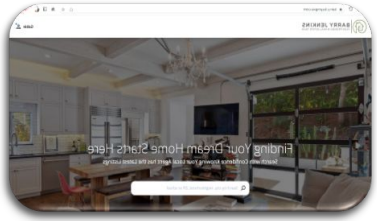
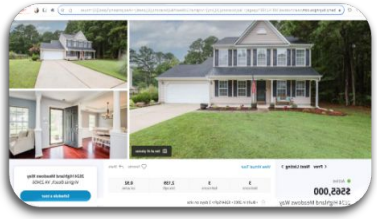
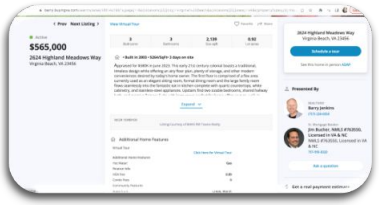
Home Search Site: Used to generate leads, remarketing, keep buyers engaged on your home search site



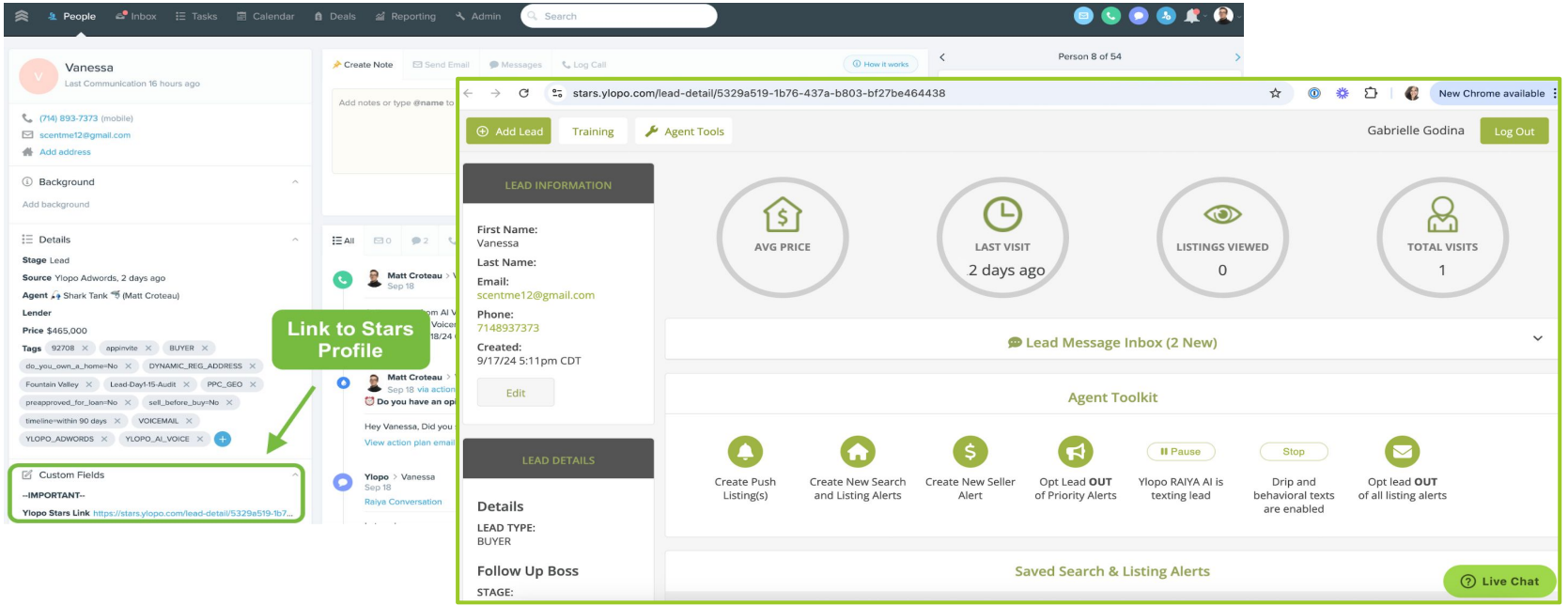
- Utilized in all Ylopo marketing and remarketing
- New visitors are asked to register
- User activity is synched to Stars, the system integrated with your CRM
- (Free Optional) Agent Subdomains







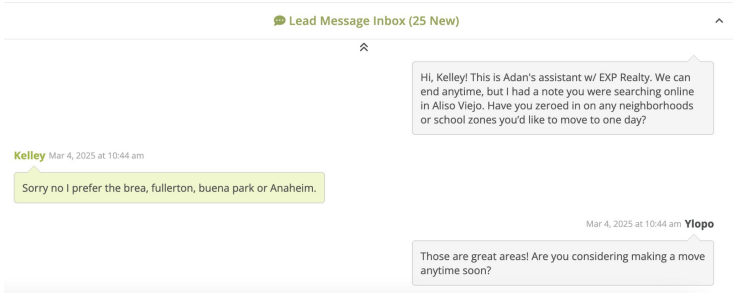
Stars Integration: Use Stars tool to engage and nurture



All Users: Utilize Stars to keep leads engaged on your new home search site with listing alerts, manage your AI texting, send AVM report, use the bad number tool and MORE!

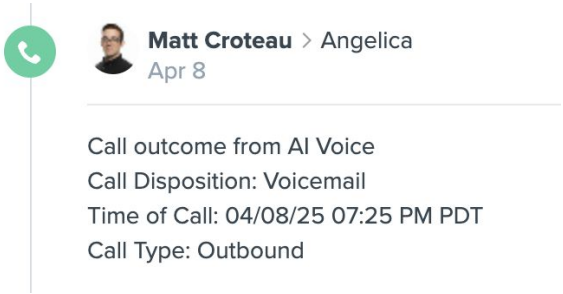
AI Text & AI Voice: Assistants begin outreach

- **AI texting outreach to new leads, manage in Stars**
  - Stars Online Course, Boot Camp will train on AI texting



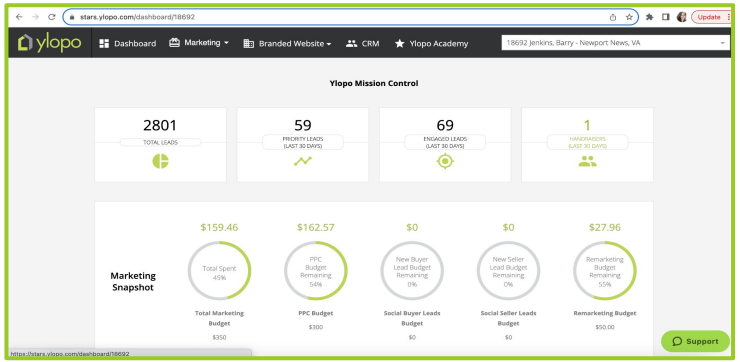
AI text outreach begins, manage in Stars

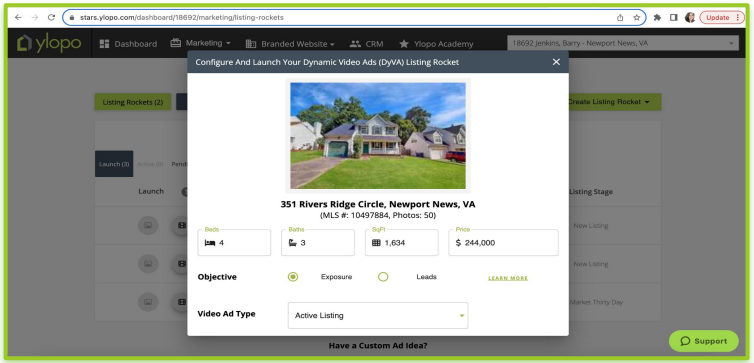
- **(Optional) AI voice begins calling eligible leads, manage voice through FUB**
  - AI Voice training should be completed



AI Voice outreach begins, manage through FUB

Mission Control: Manage marketing, view campaigns, promote listings





Ylopo Admins: View ad spend, adjust marketing areas and budgets, manage AI stages, promote listings with listing rockets and more!

- ❑ Marketing will check in 1 month post account launch - IMPORTANT TO ATTEND
- ❑ Expect lower lead volume and higher CPL in first 30 days
- ❑ Coassemble course on Mission Control assigned for admins

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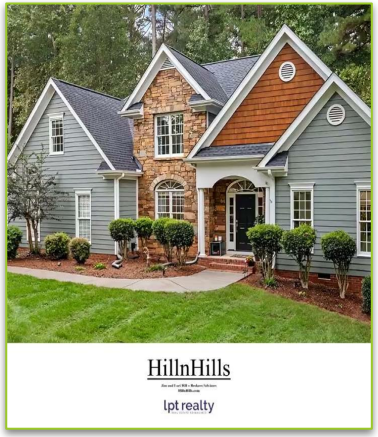
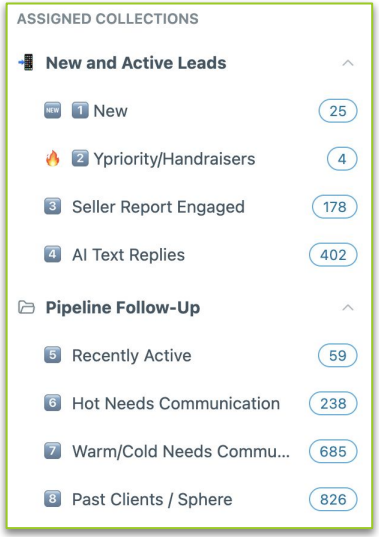
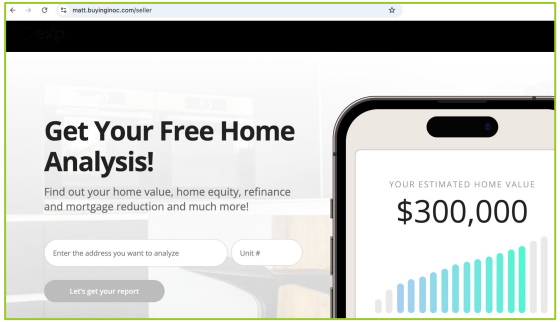
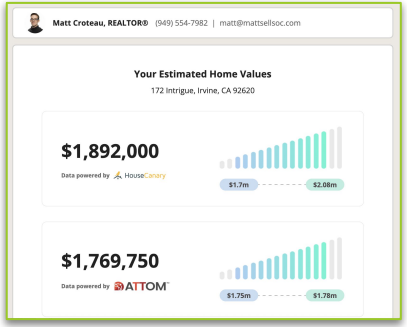
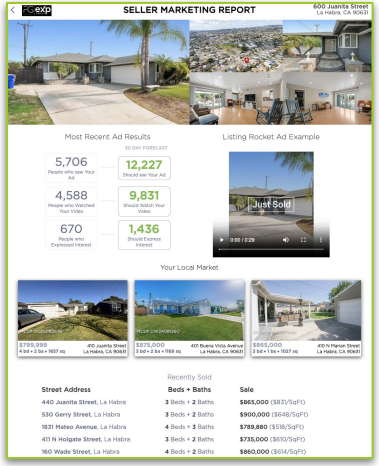
COACHES
OFFICE HOURS
Learn from the experts!
Every Monday, Tuesday, Thursday and Friday
9:00 AM Pacific Time (US and Canada)
bit.ly/Coach-Office-Hours
HOST
Matt Croteau
Ylopo Coach
HOST
Chris Phares
Ylopo Coach
HOST
Jim Hill
Ylopo Coach
HOST
Marissa Canario
Ylopo Coach


HillnHills
lpt realty


ASSIGNED COLLECTIONS
New and Active Leads
1 New 25
2 Ypriority/Handraisers 4
3 Seller Report Engaged 178
4 AI Text Replies 402
Pipeline Follow-Up
5 Recently Active 59
6 Hot Needs Communication 238
7 Warm/Cold Needs Commu... 685
8 Past Clients / Sphere 826


Get Your Free Home Analysis!
Find out your home value, home equity, refinance and mortgage reduction and much more!
YOUR ESTIMATED HOME VALUE
$300,000


Matt Croteau, REALTOR®
Your Estimated Home Values
172 Intrigue, Irvine, CA 92620
$1,892,000
$1,769,750


SELLER MARKETING REPORT
Most Recent Ad Results
Listing Rocket Ad Example
Your Local Market
Recently Sold

YOUR GUIDE TO
Home Ownership
Matt Croteau Presents To Jonathan Davis

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Ylopo Product Support

For the fastest response and resolution, please email our support team.

support@ylopo.com

If you're reporting a bug or issue, including lead examples or screenshots can significantly speed up troubleshooting and help us resolve your concern more efficiently.

Prefer to speak with someone directly?

Call (844) 359-5493

8 AM - 6 PM PST M - F, Connect with a member of our team, including Support, Billing, and Marketing for quick answers and personalized assistance.

Note: Voicemail is monitored over the weekend for urgent issues.

Take full control of your Ylopo experience with our self-service options.

Yloposupportcenter.com

From customizing your branding and managing user access to handling licenses, CRM, marketing campaigns, and AI-powered tools, everything you need to optimize your platform is available at your fingertips.

www.yloposupportcenter.com

Your Ylopo Success Teams

Ylopo Coaching

Join Ylopo Coaches every weekday at 9 AM PST! Our live coaching calls are your go-to space for open Q&A, expert guidance, and hands-on training to help you maximize your ROI.

Get real-time answers, learn what's working for other top agents, and walk away with practical strategies to grow your business with Ylopo.

Ylopo Success

Connect with a Ylopo Success Manager for personalized guidance, strategic insights, and proven best practices.

These sessions are designed to help you fine-tune your approach, maximize your results, and achieve your business goals with confidence.

Ylopo Growth Advisors

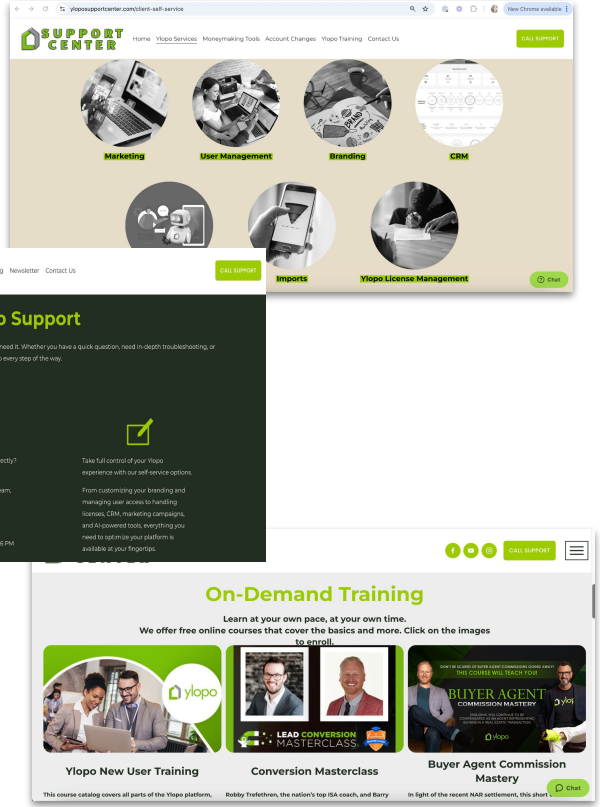
Looking to take your business to the next level? Schedule time with a Ylopo Growth Advisor for a high-level strategy session focused on maximizing your results, identifying new opportunities, and making the most of your Ylopo investment.

These conversations are ideal for teams exploring what's next and ready to scale smarter.

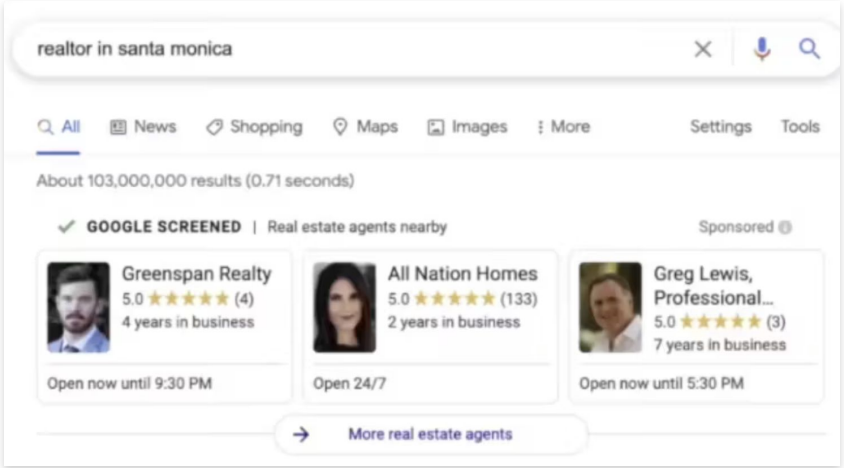
www.yloposupportcenter.com

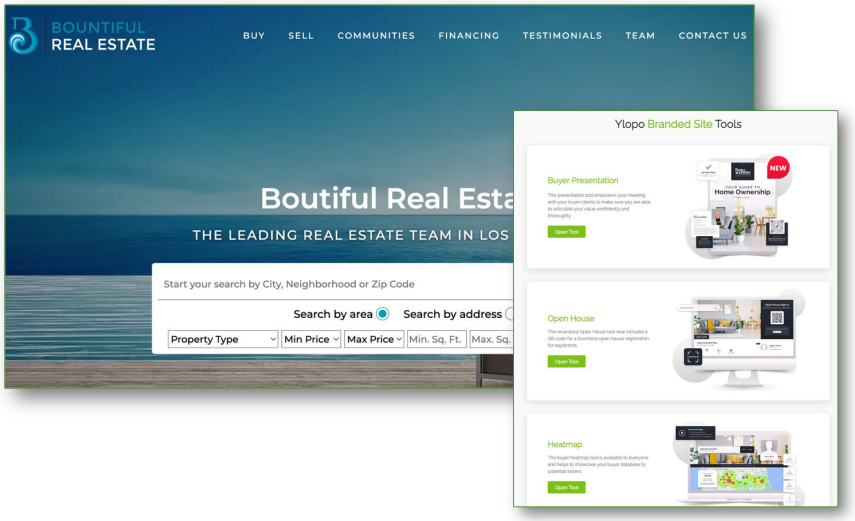
Utilize YlopoSupportCenter.com

- **Get Support**
  - Ylopo Product Support Help
  - Book a Coaching Call
- **Self Service**
  - Add/remove Ylopo users
  - Update Ylopo services
  - Account Changes
  - Mass Lead imports
- **Training Guides and Resources**
  - Sign up for Ylopo Training
  - Access Recordings
  - Best Practices
- **& More!**

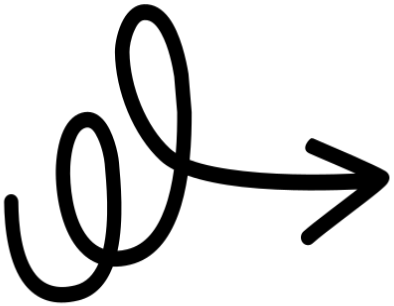


Not Live: LSA, GBP & Branded Site





Ylopo Role
+ CRM
Integration



CRM, Ylopo, and Agent Roles in Online Lead Generation

CRM

Lead Management

- ❑ 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

Agent

Relationship Management

- ❑ Prospect Leads
- ❑ Qualify leads
- ❑ Stage/segment Lead
- ❑ Create relationships
- ❑ Add Value
- ❑ Determine best follow up
- ❑ Stay connected to nurture leads, past clients and your Sphere
- ❑ Add notes/create tasks
- ❑ Work leads and deals

Ylopo

Marketing, Websites and Agent Tools

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

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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

Lofty
kvCORE
Sierra Interactive
LionDesk
follow up boss

- ❑ 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]

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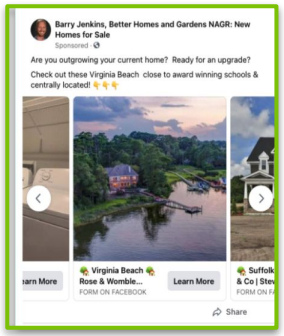
Ylopo + CRM: New Buyer Lead Journey

Lead

Facebook Social Ads



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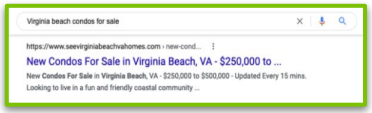
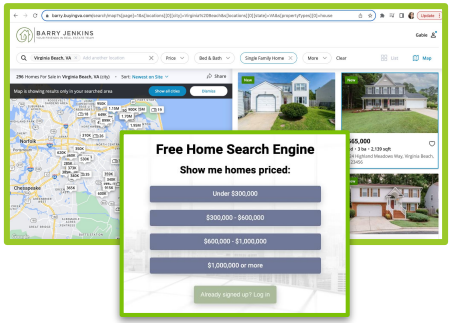
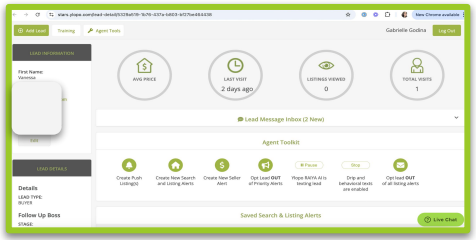


Google PPC Ads

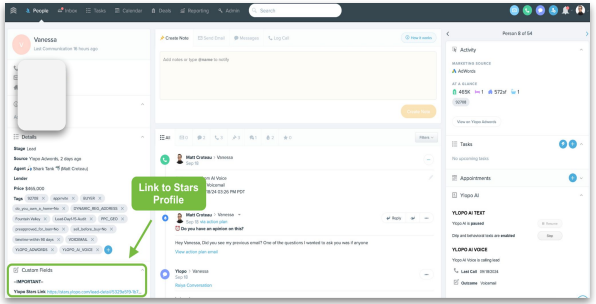
Home Search Site
Registration & Profile creation



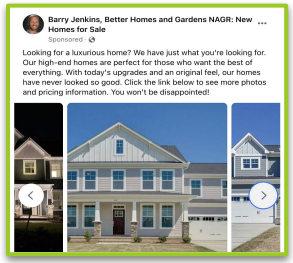
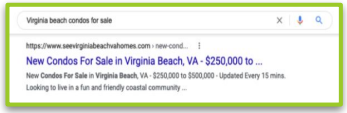
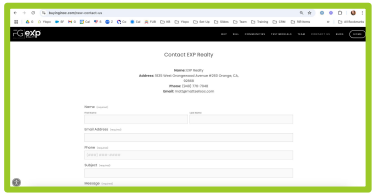
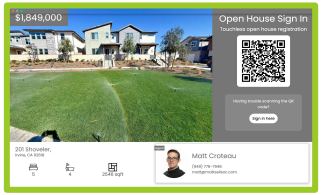


- Stars Profile created
- Saved search created
- Listing alert sent
- Ylopo AI engagement begins
- Lead captured for remarketing

Lead delivered to CRM to begin outreach, Access Stars Profile through link in CRM



CRM + Ylopo (Stars): Sources

Ylopo Lead Source:	Home Search Site: Facebook/Social	Home Search Site: Google Ads/PPC	Branded Site, Branded Sites Tools Page Tools	Branded Site: Open House Tool
				
Ylopo Source Name in FUB:	• Ylopo Buyers • Ylopo Sellers • Direct Connect FB	• Ylopo Adwords, Ylopo LSA • Direct Connect PPC	• Branded Website	• Open House (Ylopo)

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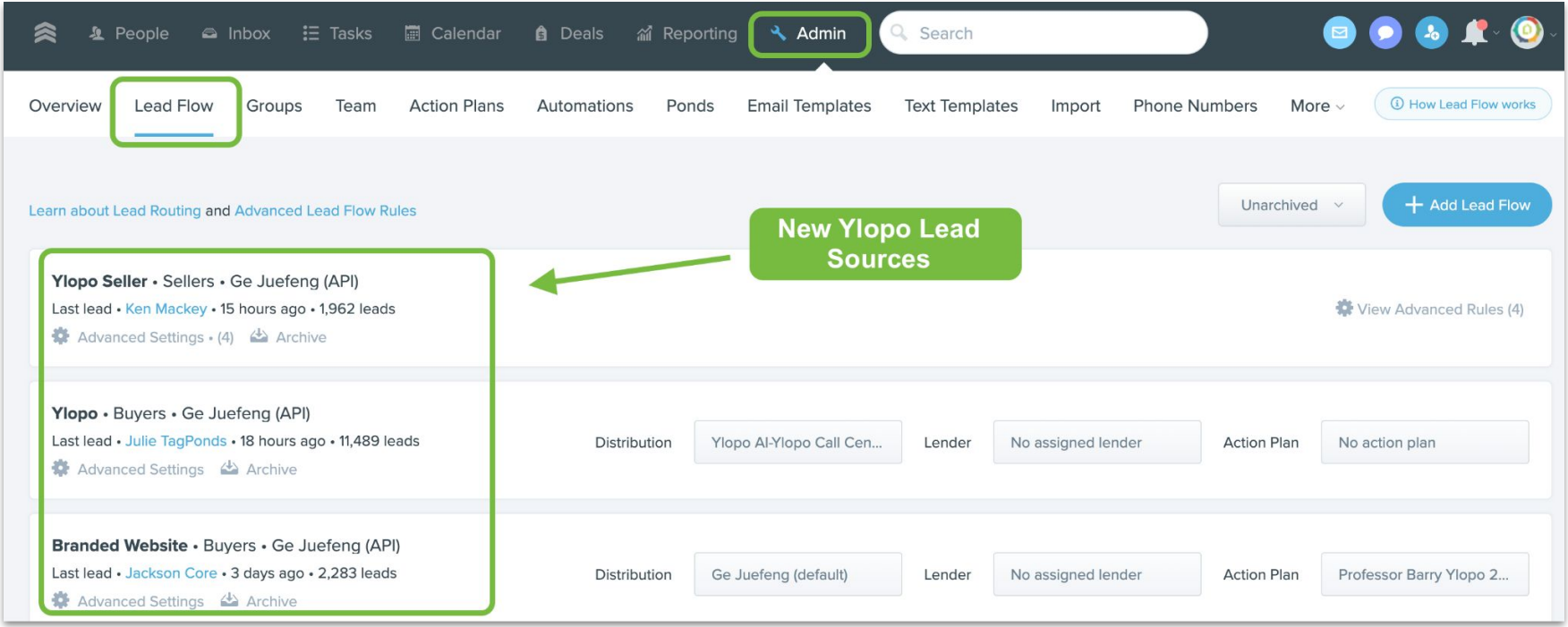
Ylopo + CRM: Lead Sources



Ylopo will only set up lead distribution for AI Voice eligible lead sources based on your AI Voice set up. Advise which lead sources to Auto-import into Ylopo Stars (if CRM applicable)

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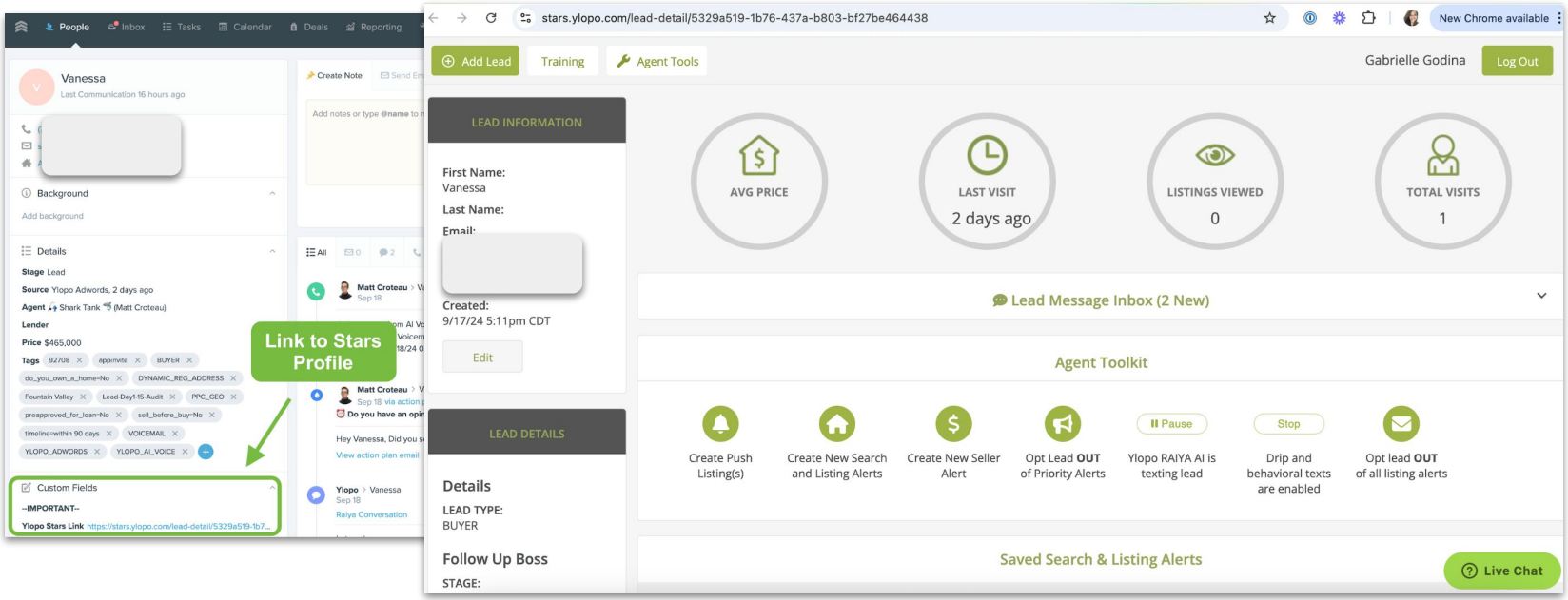
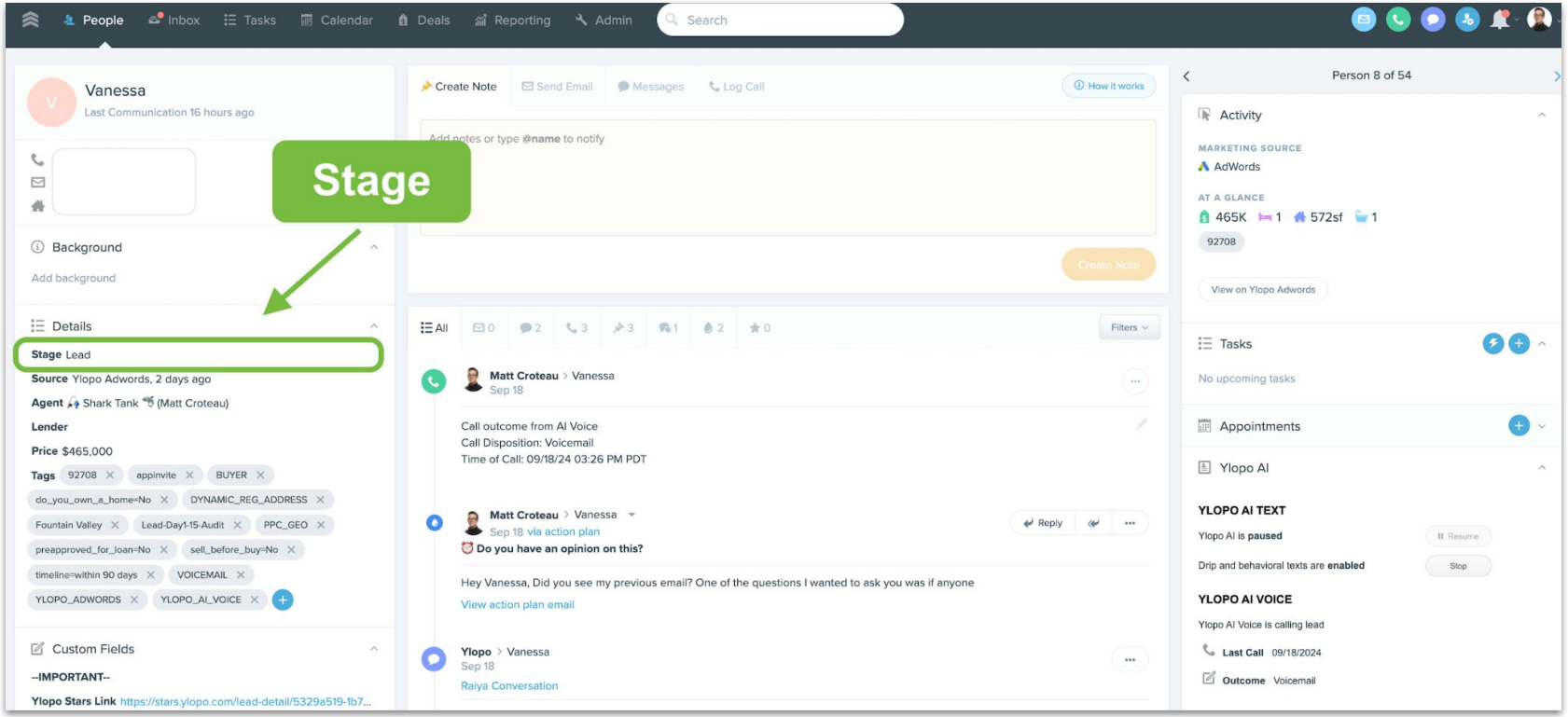
Ylopo + CRM: Link to Stars



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.

Ylopo + CRM: Stage



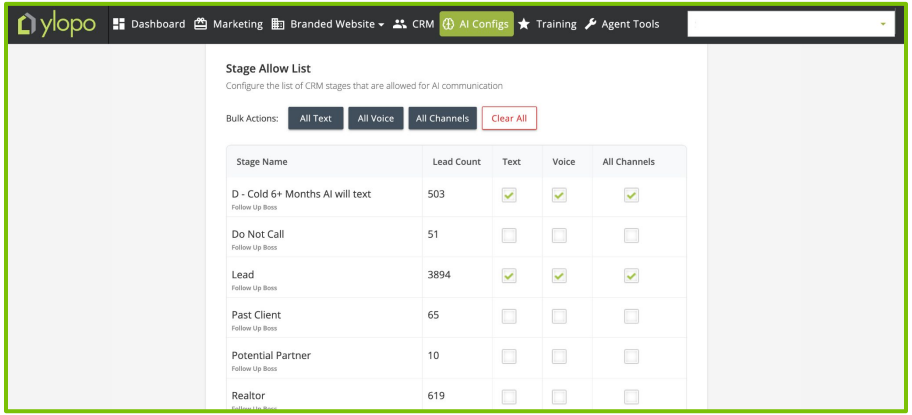
Stage/Status/Pipeline: AI blocked or allowed

Ylopo + CRM: Stage

AI

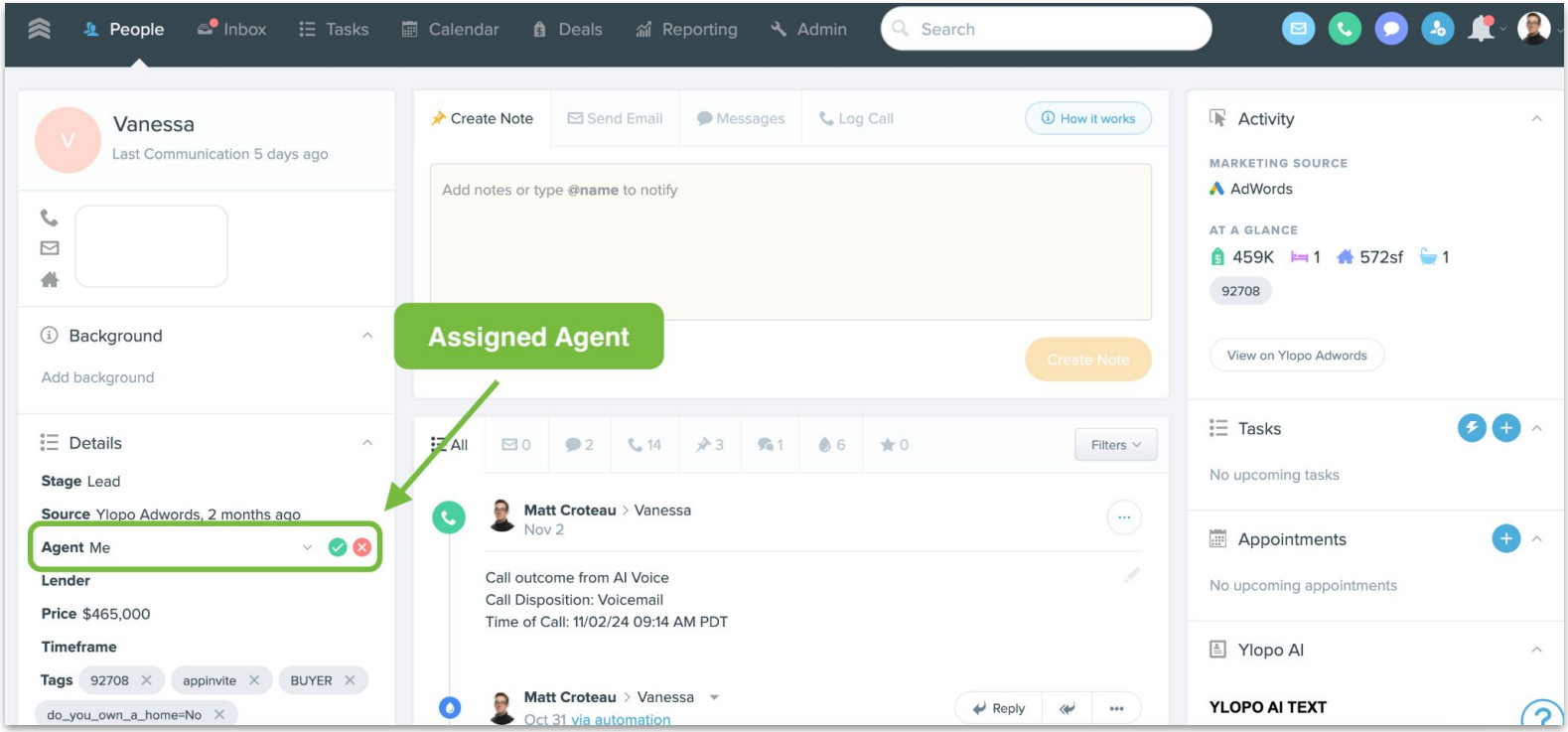
Recommended blocked stages

- **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

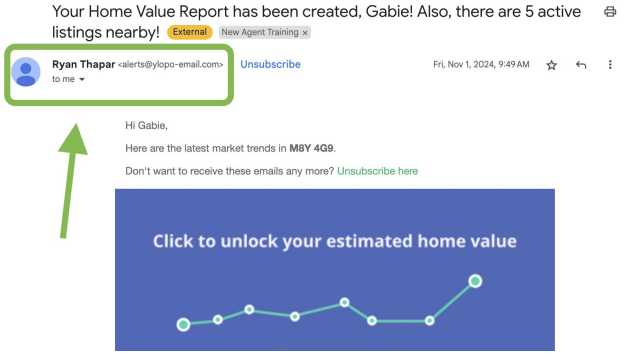
Ylopo + CRM: Assigned Agent



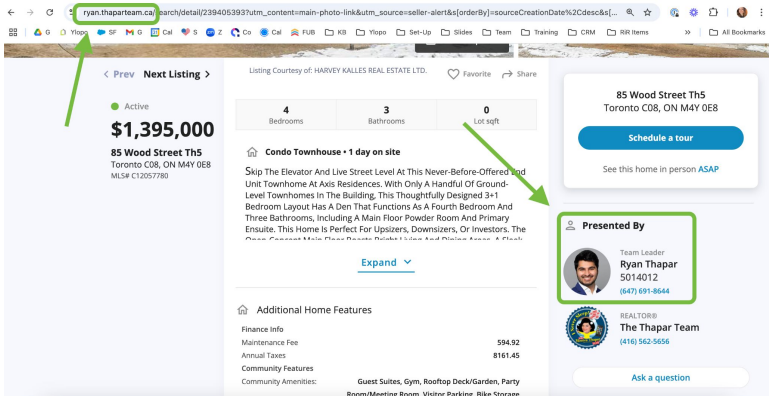
Ylopo Listing and Seller Alerts, Presented by section on Home Search Site

Ylopo + CRM: Assigned Agent

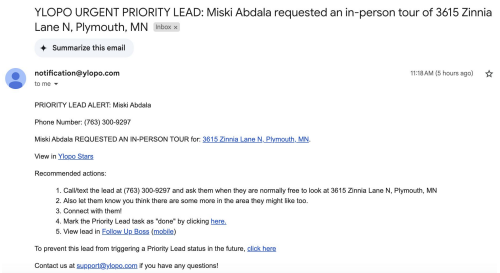
Listing Alerts/Seller Alerts



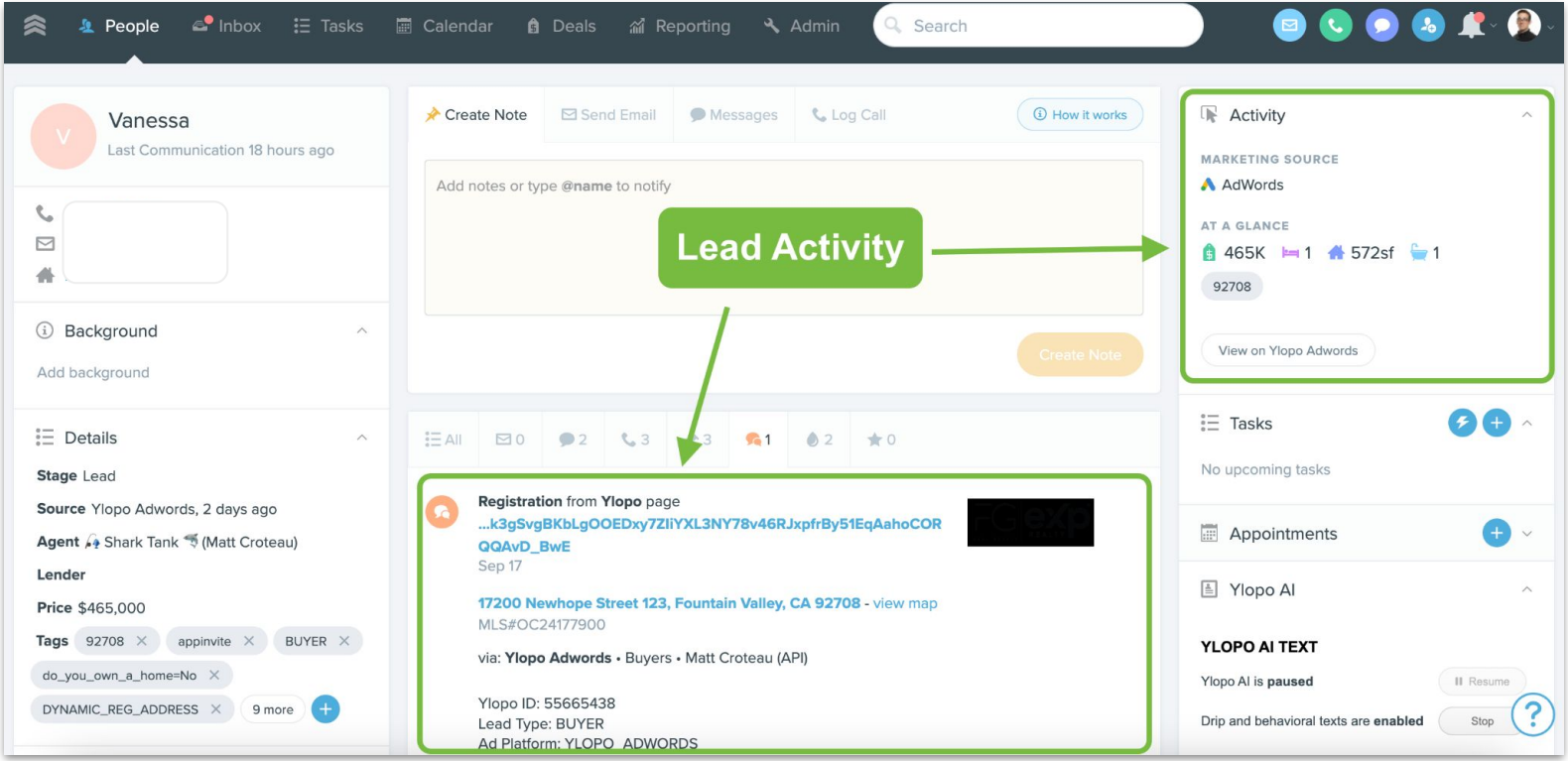
(Optional) Agent Home Search Site



Ylopo Notifications to Agent



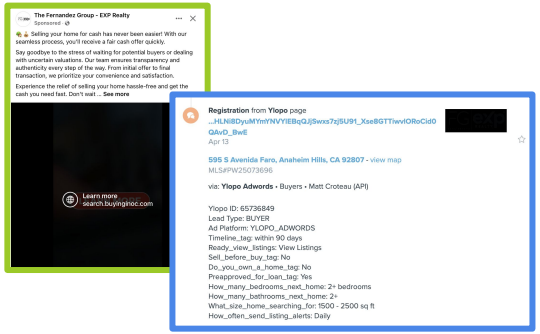
Ylopo + CRM: Activity



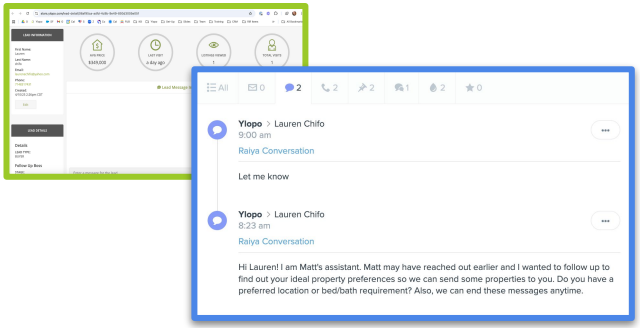
Activity from engagement with Ylopo ads, AI, websites and tools

Ylopo + CRM: Activity

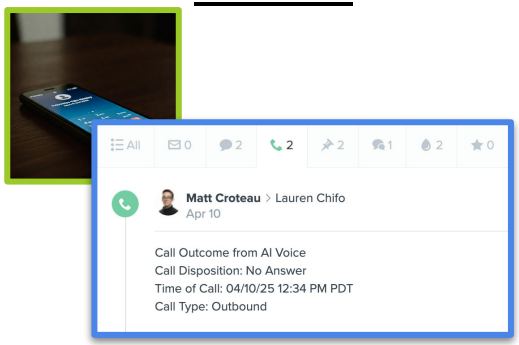
Ad Engagement



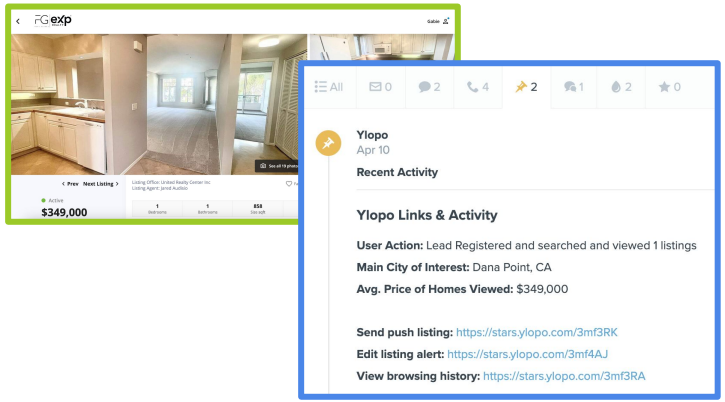
AI Text



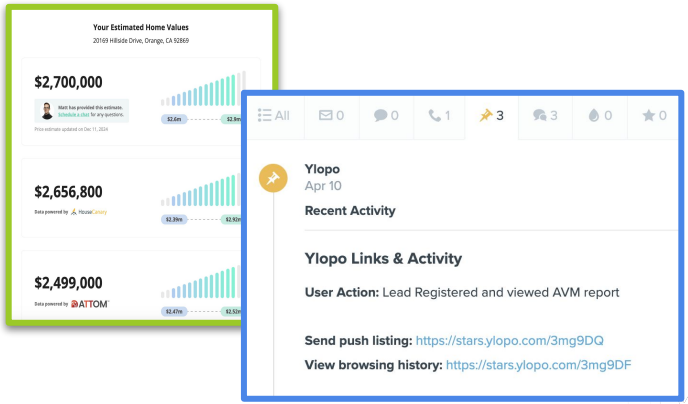
AI Voice



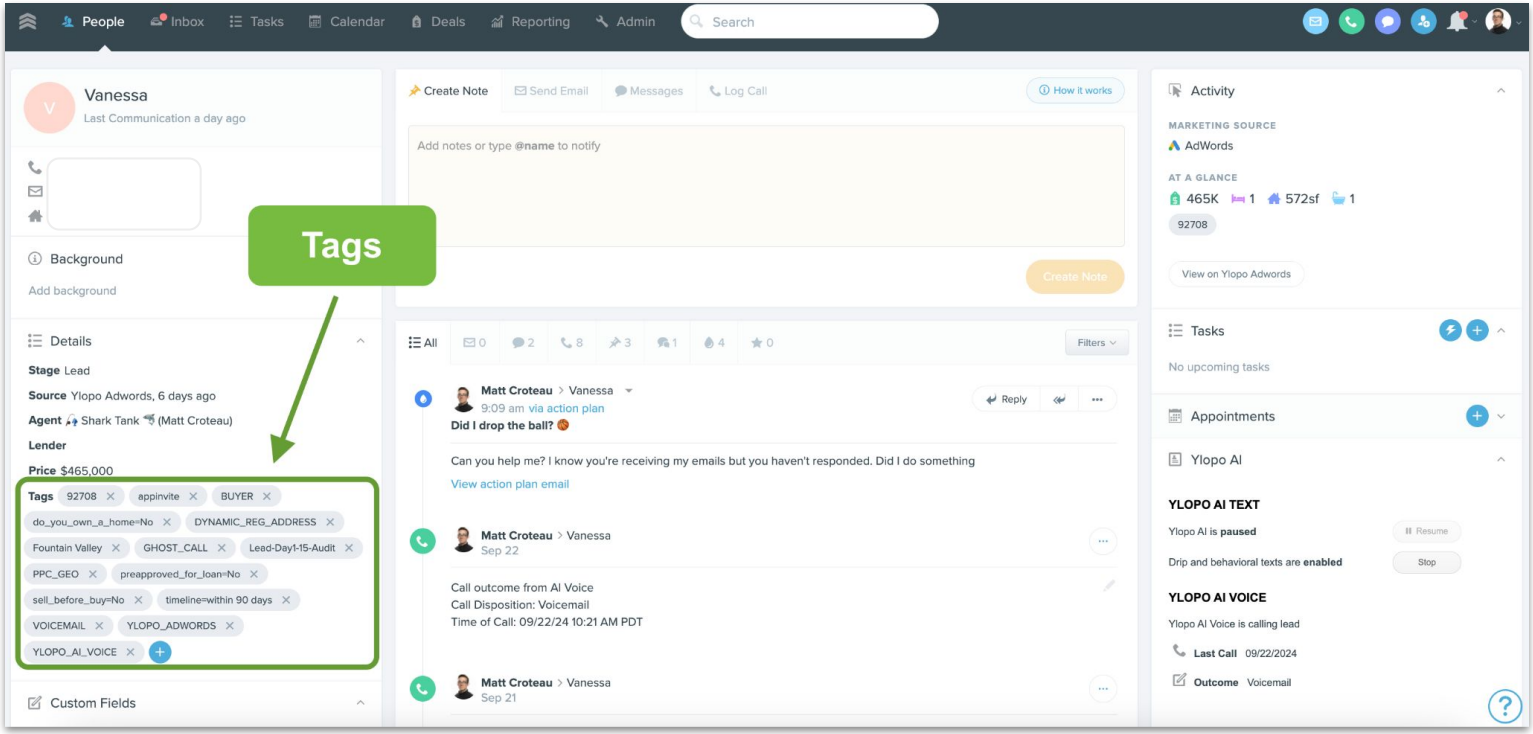
Home Search Site Activity



Seller Report & Listing Alerts



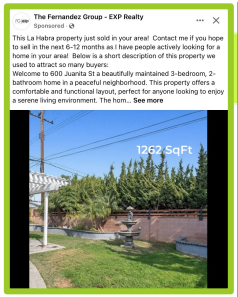
Ylopo + CRM: Tags

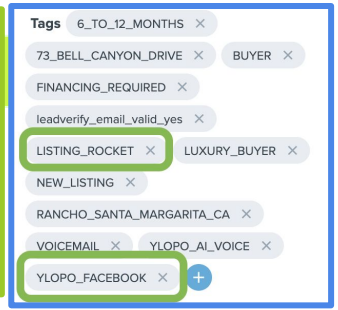


Ylopo Tags will be utilized to indicate lead activity, AI text, AI Voice dispositions, lead source and more so you can easily filter through your database, route leads, create automations - IMPROVE YOUR CRM WORKFLOW

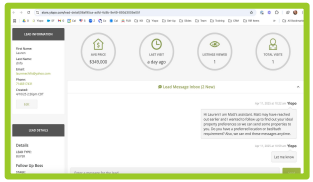
Ylopo + CRM: Tags examples

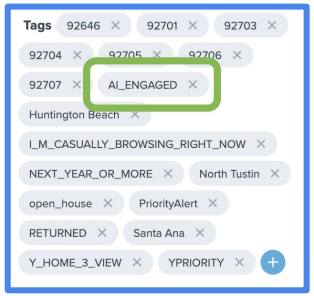
Ad Engagement



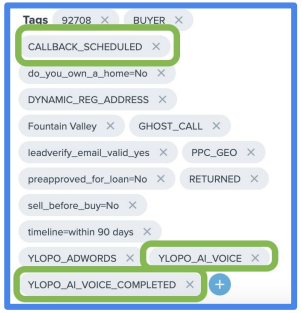


AI Text

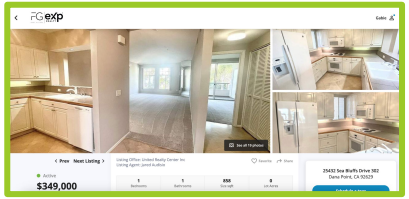


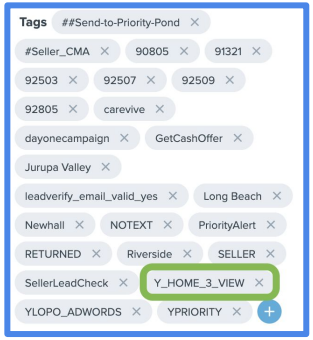


AI Voice

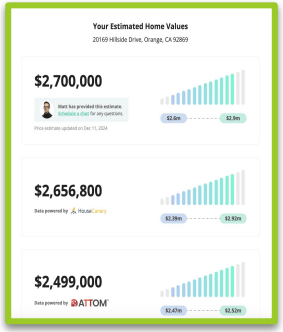


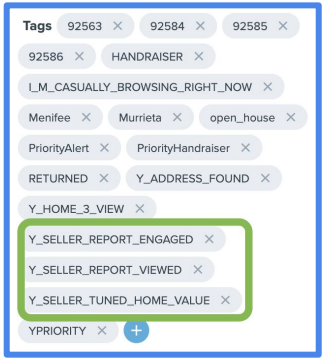
Home Search Site Activity





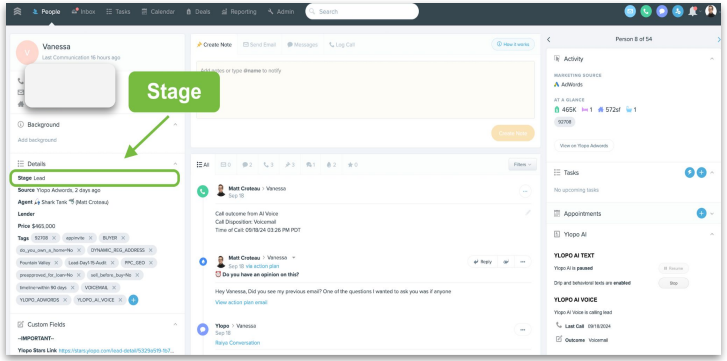
Seller Report & Listing Alerts

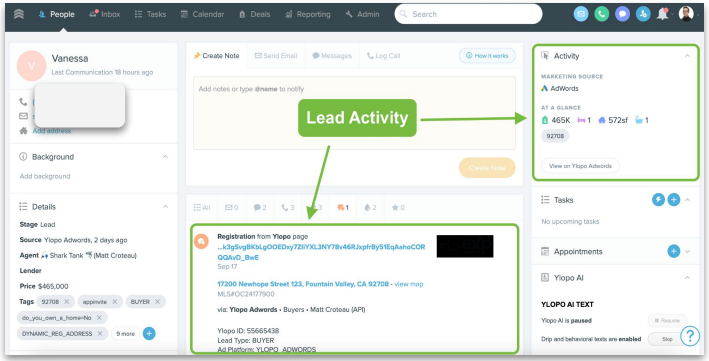




Ylopo + CRM: Integration Review

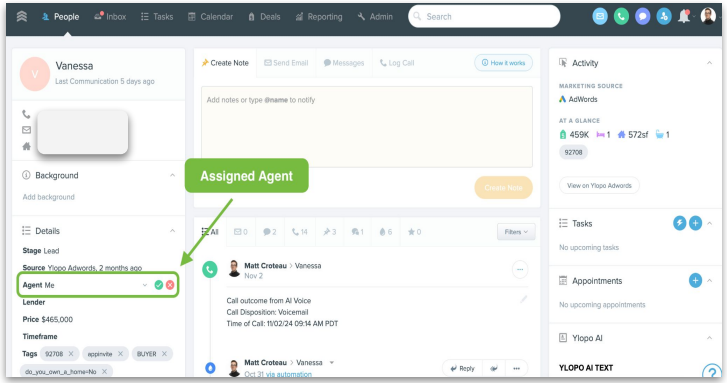
AI blocked or allowed

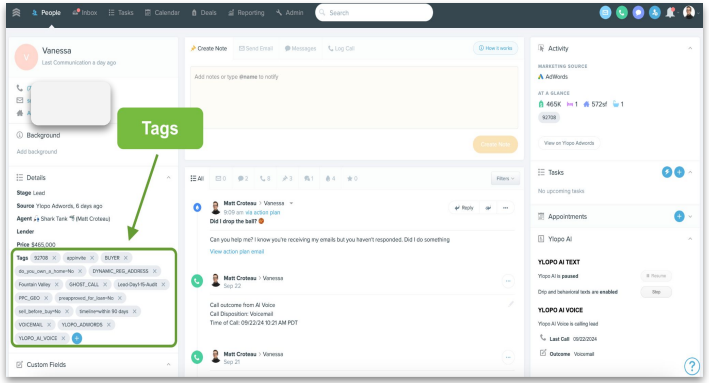


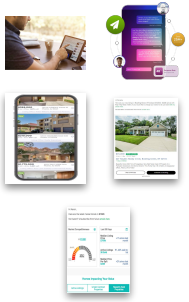


Activity from engagement with Ylopo ads, AI, websites and tools

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





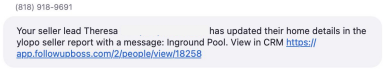


Lead sources, registration responses, engagement with Ylopo sites, AI and tools

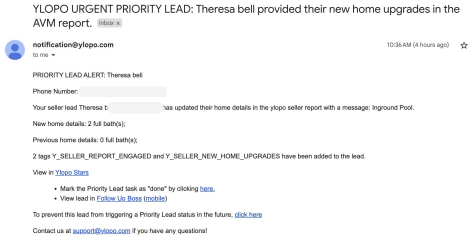
Ylopo Notifications: Priority Notifications

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!

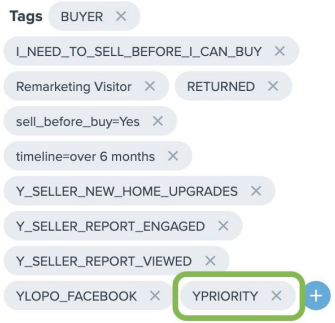
Priority Text sent to agent



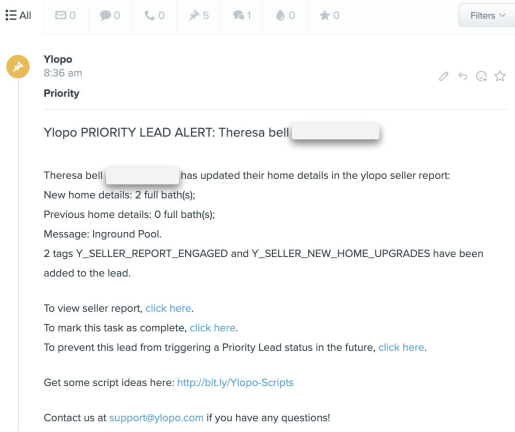
Priority Email sent to agent



YPRIORITY tag added on lead profile



Priority notes added to lead profile in CRM



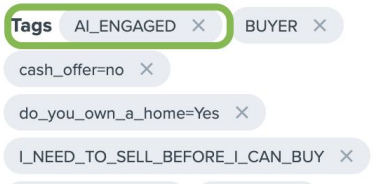
Ylopo Notifications: Responses to AI Texting

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.

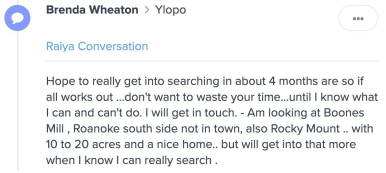
Text notification sent to agent

Email notification sent to agent

AI Text Tag added to CRM profile



Conversation added to lead profile in CRM



Importing
Leads
into Stars

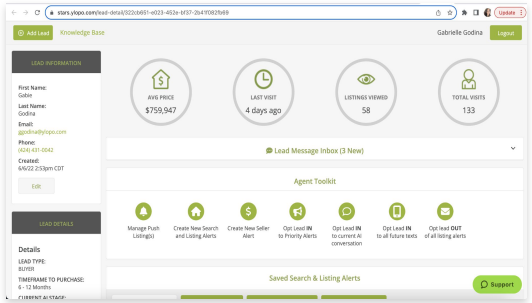
Mass Lead Import

SCAN ME

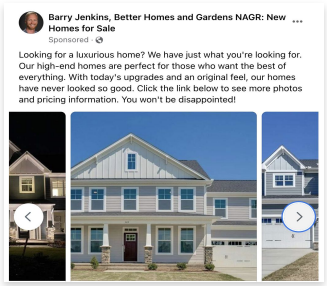
Best for importing large buyer and remarketing only contacts into Stars

Prep:

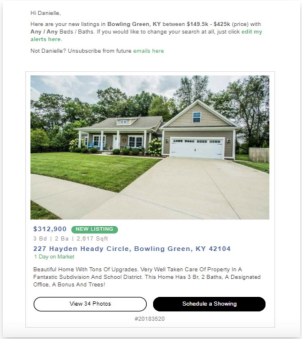
- ❑ Import leads into CRM, email must be present
- ❑ Export saved searches to be used for existing e-alerts
- ❑ Your Implementation Specialist will provide you further instructions



Import into Stars



Remarketing



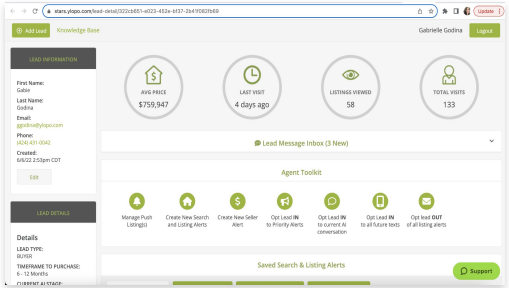
Optional Listing Alert

Seller Leads Import

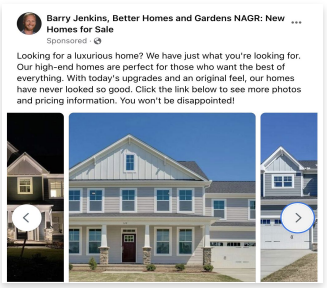
Best for targeting sellers/home owners

Prep:

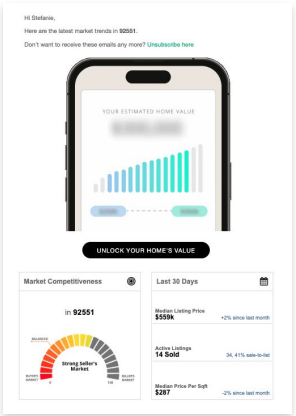
- ❑ Import leads into CRM, email must be present
- ❑ Ensure lead/client addresses are present
- ❑ Only import seller leads that are either past clients or generated seller leads
- ❑ Your Implementation Specialist will provide you further instructions

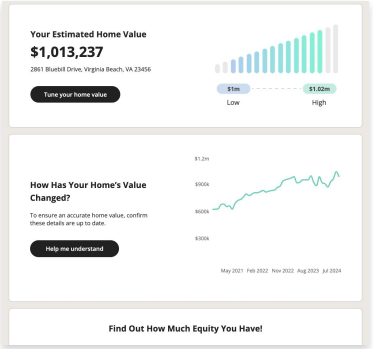


Import into Stars



Remarketing





Seller Alert/Seller Report

Next
Steps

Next Steps before Go Live!

- ❑ Continue to work with your Implementation Specialist in Base Camp
- ❑ Understand your CRM features and functionality
- ❑ Complete Ylopo New User online training
- ❑ Approve your Home Search Site
- ❑ Prep your CRM/database for Stars Import
- ❑ Register and Attend Ylopo New Client Bootcamp

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