v8

The most powerful version ever released.

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Welcome — and thank you for joining us today.

Agenda

- **Sierra Interactive Integration and v8 Highlights**
- **System Pt. 1** (Lead Status Definitions, Smart Filters, Contact Templates, Action Plans)
- **Nudge your Database**
- **System Pt. 2** (Automations, Landing Pages, Tags)
- **Work the Responses** (Inbox, Priority — Tasks filter)

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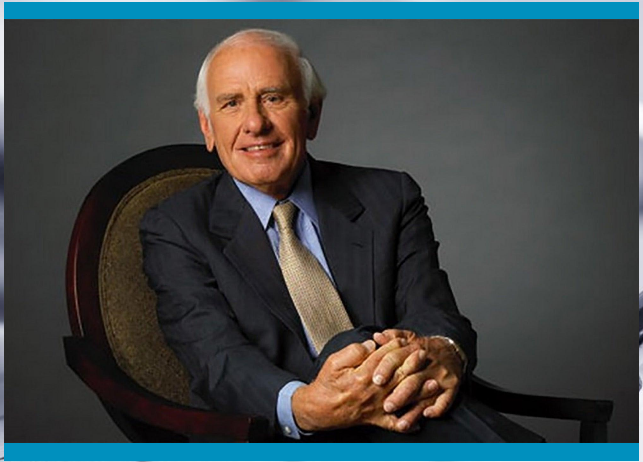

Mindset

"Success is nothing more than a few simple disciplines, practiced every day."

— Jim Rohn

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Sierra Interactive Integration

A lead management system that seamlessly integrates with Sierra Interactive — easy plug-and-play functionality.

What's included?

- Action Plans
- Automations
- Landing Pages
- Smart Filters
- Contact Templates
- Tags

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Main Benefits

Save Time And Avoid The Headache

Avoid wasting valuable time and energy building out your CRM. Instead, leverage our plug-in-play lead management system which is deeply integrated into Sierra Interactive.

Simplify Your Day — Daily Workflow

Stop reaching out to leads randomly. Our daily workflow puts the hottest leads inside your CRM front and center so that you know exactly who needs immediate attention.

Inject Video Into Your Follow-Up Strategy

Start nurturing your database with video content to set yourself apart from the competition. We provide scripts to re-film the videos that come stock on the landing pages.

Hold Yourself And/Or Team Accountable

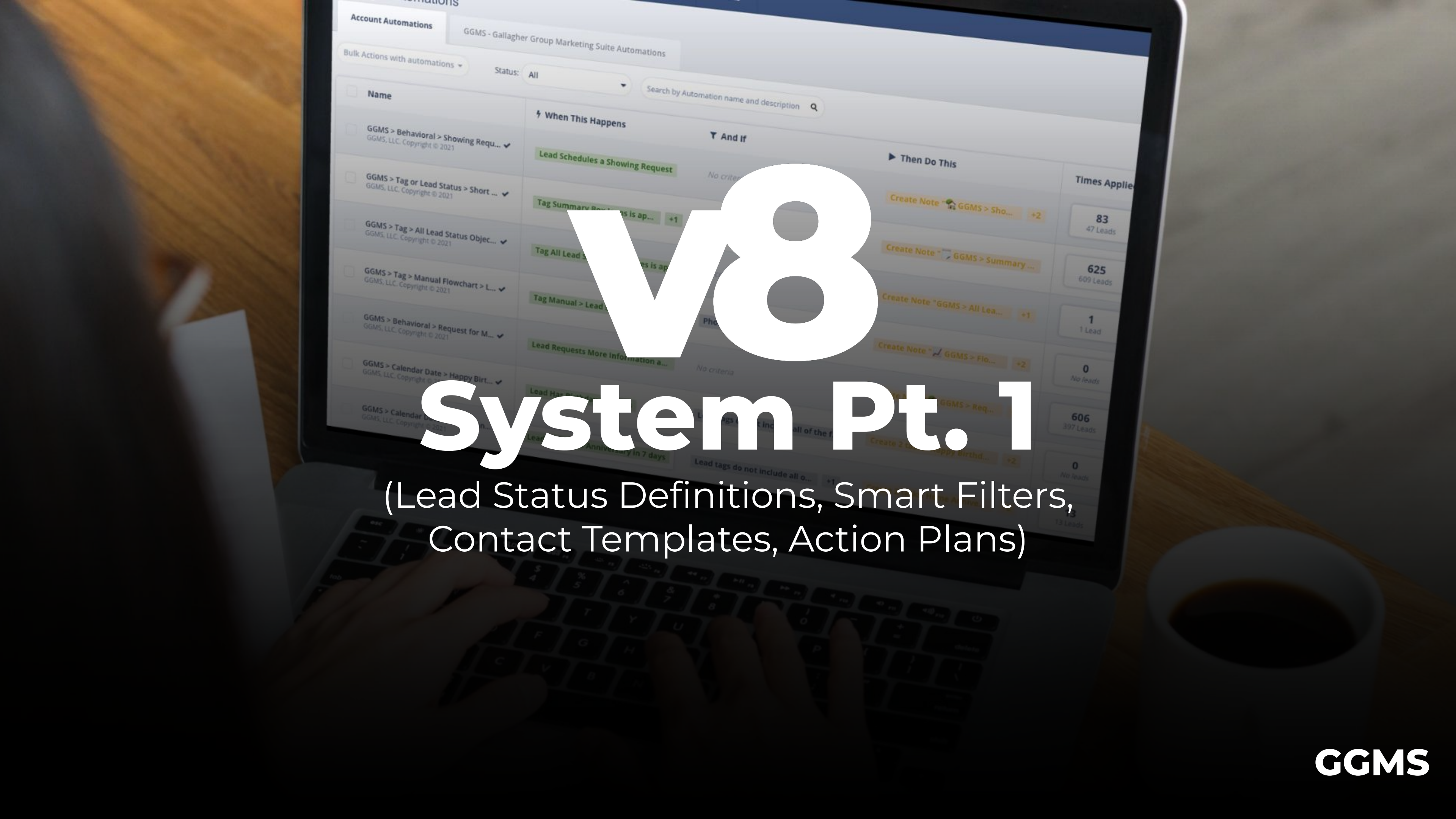
Our lead management system adds transparency to your CRM. Quickly identify when you and/or your team are behind on tasks, calls, responses, and general database maintenance.

Sierra Interactive Integration

v8 Highlights

The core highlights of this version include the following;

- Phone Call & Task Alerts (Time-Sensitive)
- Automation Enhancements
- Simplified Smart Filter Dashboard
- Cash Offer Strategy (Landing Page, Action Plan, Script & FB/Insta videos)
- Updated Market Watch Video
- Zillow Call Alerts for New Leads
- Nudge Action Plans (Text Only)
- Active, Closed, SOI, and Pending Action Plans
- Streamlined GGMS Assist process
- Signature Line removed from Emails
- Bugfixes, Grammatical Errors, and more...



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System Pt. 1

(Lead Status Definitions, Smart Filters, Contact Templates, Action Plans)

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3 Types of Lead Statuses

Very Important. Automations, action plans, tasks, etc. are driven by lead status. Leads in the wrong status might cause them to receive irrelevant email and/or text messaging.

ENGAGEMENT

Automation monitors lead behavior, assigns tasks, and automatically engages and nurtures the contact using mixture of email and text messaging.

SENSITIVE

Automation monitors for lead behavior and assigns a task, if needed, but will not automatically engage the contact.

DISQUALIFIED

Automation monitors for lead behavior and assigns a task, if needed, but will not automatically engage the contact.

System Pt. 1

Engagement			Sensitive			
New	**Qualify**	**Active**	**Prime**	**Pending**	**Closed**	**Archived**
New leads, registered in the last 45 days.	Cold, unresponsive leads regardless of lead source.	Warm leads, hand-raisers that we had a positive communication via text, email, or phone call.	Hot leads, lead is within 90 days from purchasing and/or listing their home. ...or scheduled an appointment, met in person, pre-approved, or sent to a lender.	Pending offer, under an agreement, or you've listed their home.	Past clients, ask for referrals and repeat business.	Sphere of influence, ask for referrals.

System Pt. 1

Disqualified

Watch	Junk	DNC	Blocked
Outbound referrals, linked leads, working with another agent.	Already purchased or sold with another agent.	Disqualified leads. Automatically opt's lead out of receiving marketing emails & texts.	Blocks ability to visit the site.

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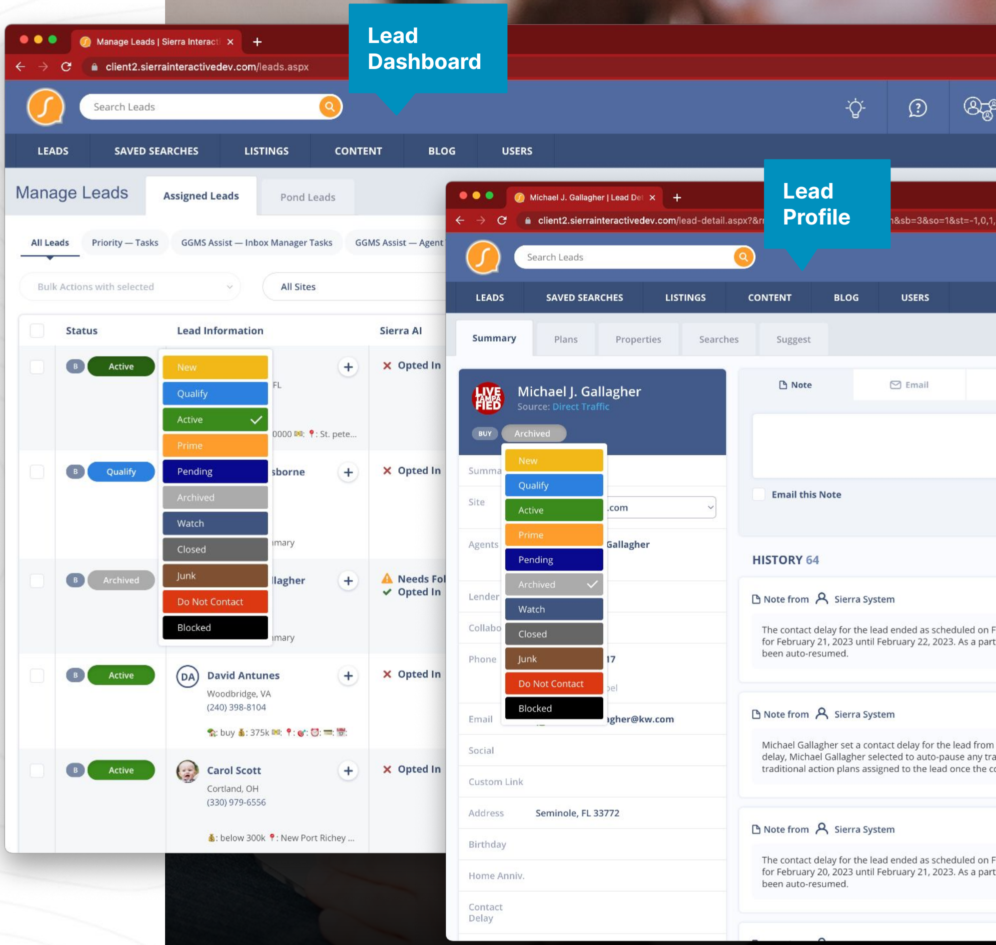
System Pt. 1

How do I update a lead status?

Click the lead status drop down menu in select places from inside Sierra Interactive.

- Lead dashboard
- Lead profile
- Bulk action from the lead dashboard



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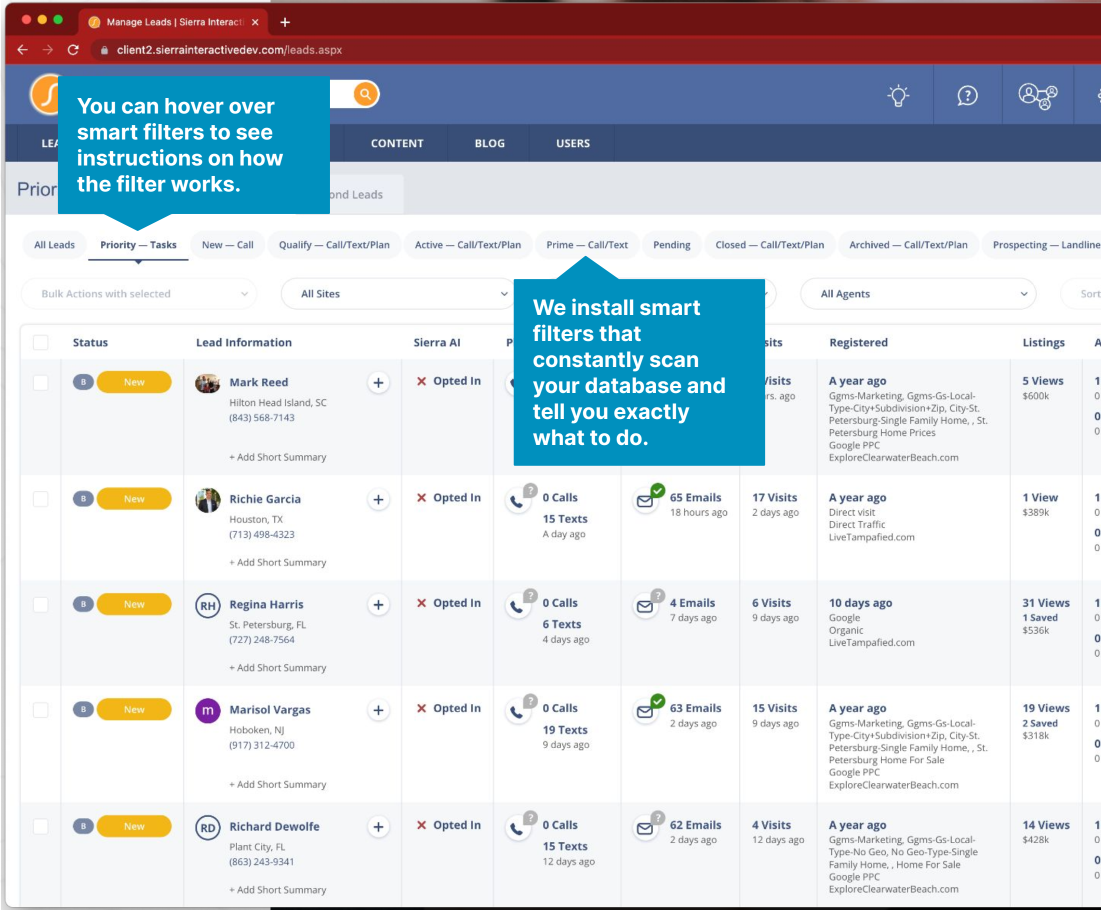
System Pt. 1

Smart Filters

Our intelligent filters that continuously monitor your database and provide clear instructions on the next steps.

There are (3) three smart filter styles;

1. **Task** — Outbound communication or action needed
2. **Engagement (Call/Text/Plan)** — Dynamically populate based on gaps in the follow-up.
   a. Call, text, or apply a plan to remove the contact from the smart filter
3. **Lead maintenance** — Duplicate leads, no e-alert or market report, etc



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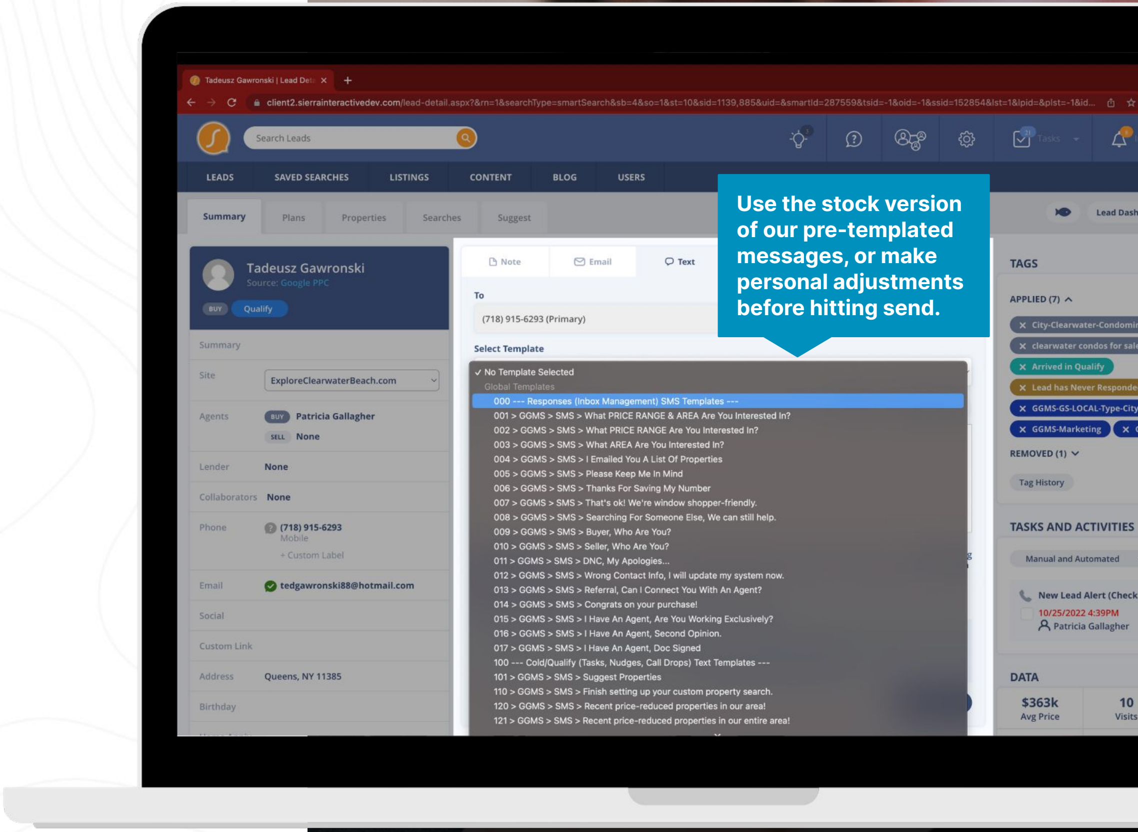
System Pt. 1

Contact Templates

- Quickly respond to a lead using a pre-written template.
- Use the stock version of our pre-templated messages, or make personal adjustments before hitting send.
- Uncover more opportunities by nudging your database with contact templates.



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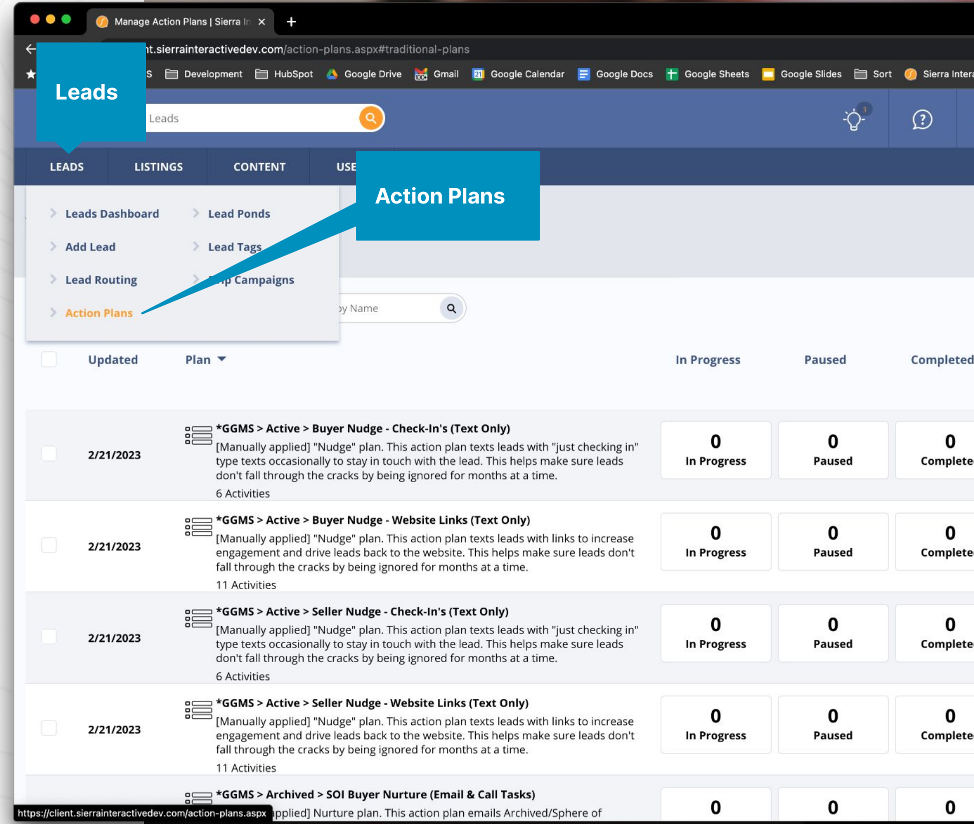
System Pt. 1

Action Plans

- The action plans with an (*) asterisk are manually applied using an engagement filter.
- The content of the campaigns is tailored to the lead status in Sierra Interactive.
- Many action plans are applied through lead routing rules or automations.
- Most plans feature links to the custom landing pages installed in your account.
- Personalize the landing page video content to alter messaging and experience.



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Nudge your Database

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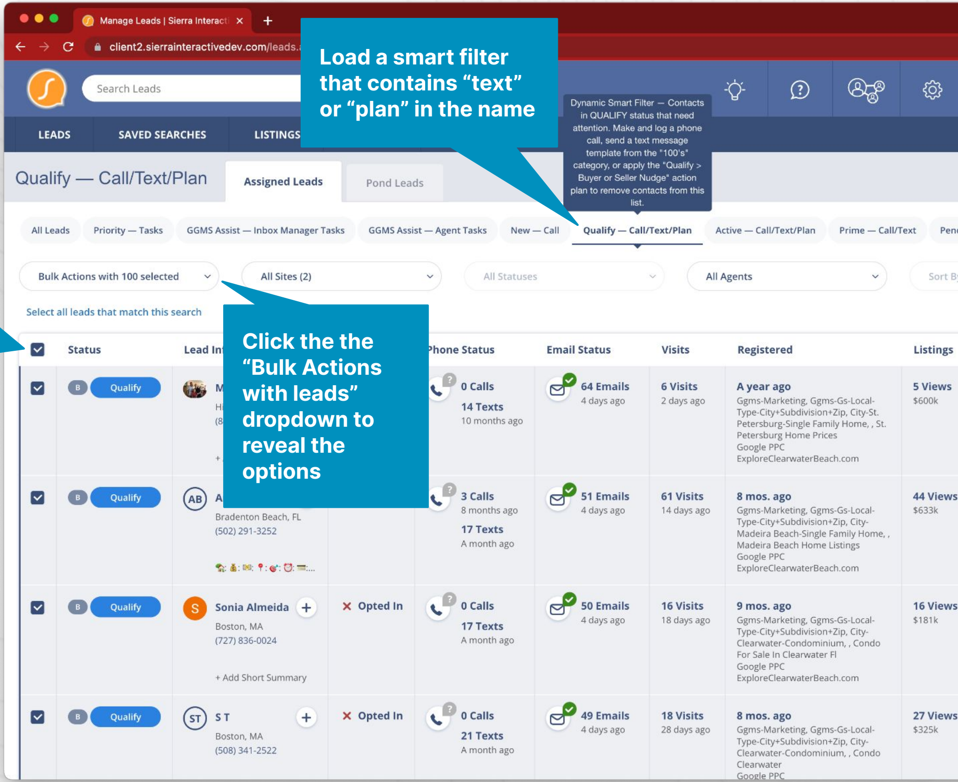
Bulk Select from the Dashboard

- Load a smart filter form the lead dashboard that contains “text” or “plan” in the name
- Hover over the smart filter and read the description which explains the proper templates or plans to use
- Select the checkbox to bulk select the whole page of contacts
- Click the the “Bulk Actions with leads” dropdown to reveal the options

Select the checkbox to bulk select the whole page of contacts

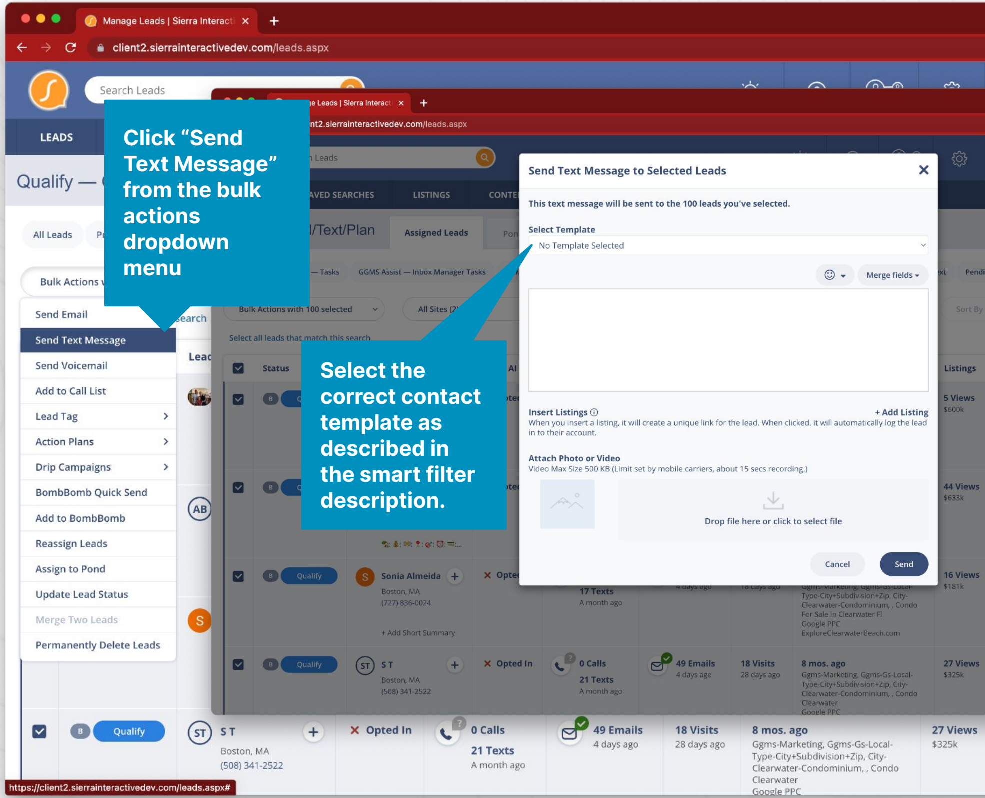


Nudge your Database

Nudge with Contact Template

Contacts will stay removed from the smart filter for 30 days using this method.

- Click “Send Text Message” from the bulk actions dropdown menu.
- Select the correct contact template as described in the smart filter description.
- Preview the message, make any edits, then hit “Send.”



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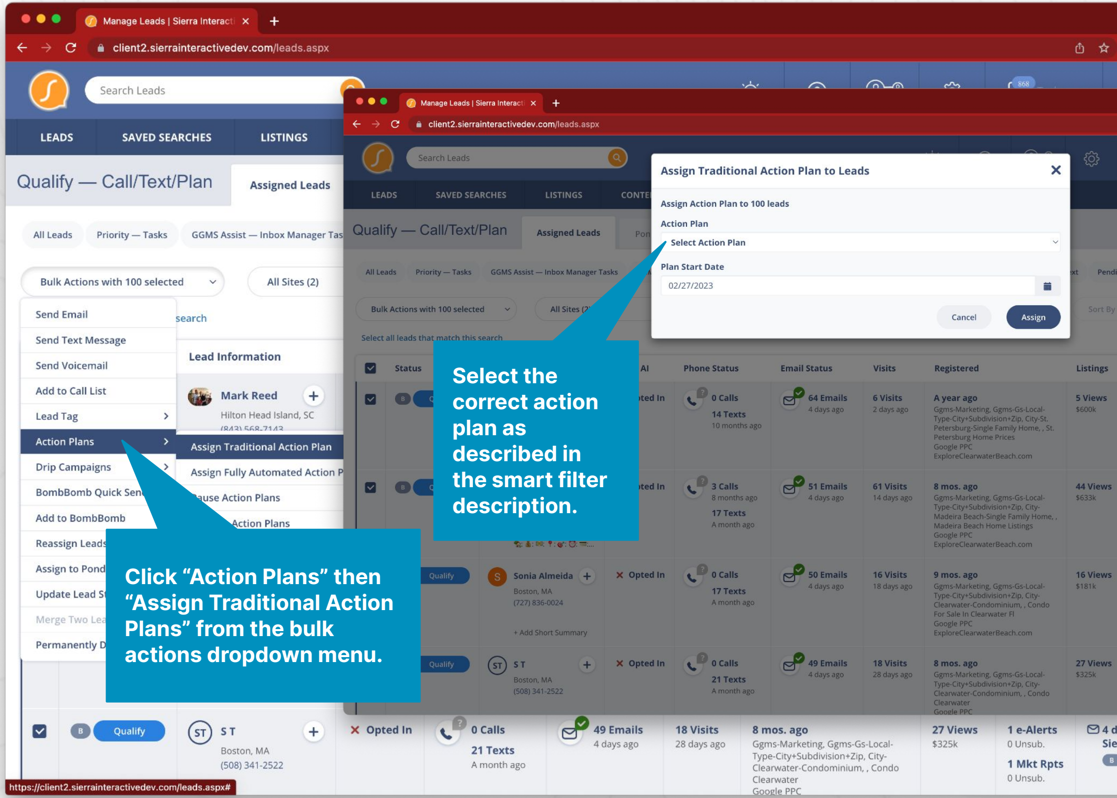
Nudge your Database

Nudge with Action Plan

Contacts will stay removed from the smart filter for months using this method.

- Click “Action Plans” then “Assign Traditional Action Plans” from the bulk actions dropdown menu.
- Select the correct action plan as described in the smart filter description.
- Choose the plan start date, then hit “Assign.”



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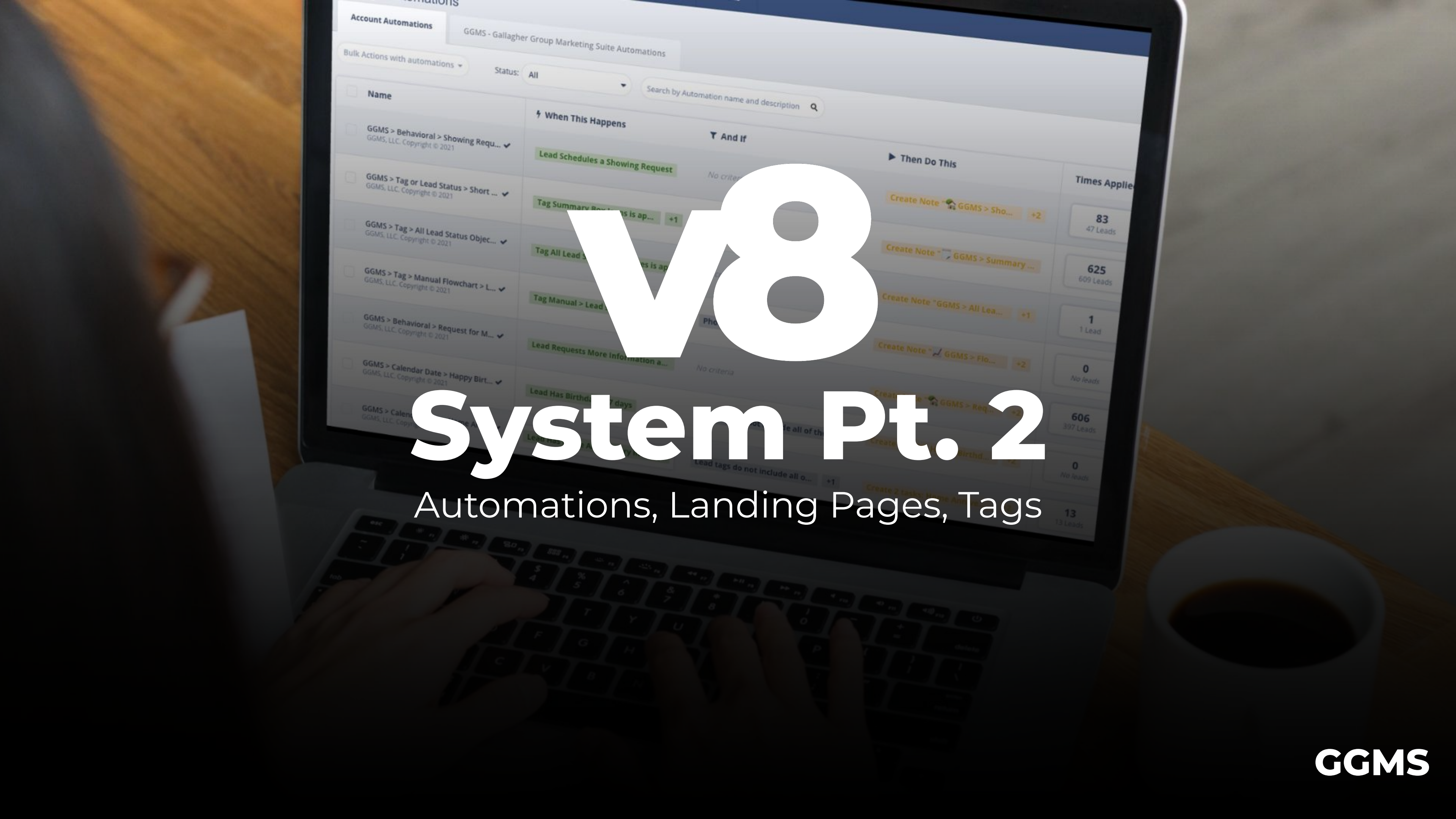

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System Pt. 2

Automations, Landing Pages, Tags

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System Pt. 2

Automations

We turn your CRM into a smart lead management system through automation.

- Automations scan your database and apply action plans automatically.
- Monitors lead behavior and assigns phone call alerts for the hottest opportunities.
- Reduce time-consuming lead maintenance tasks and improve efficiency.
- Keeps track of lead behavior to ensure you never miss a potential opportunity.

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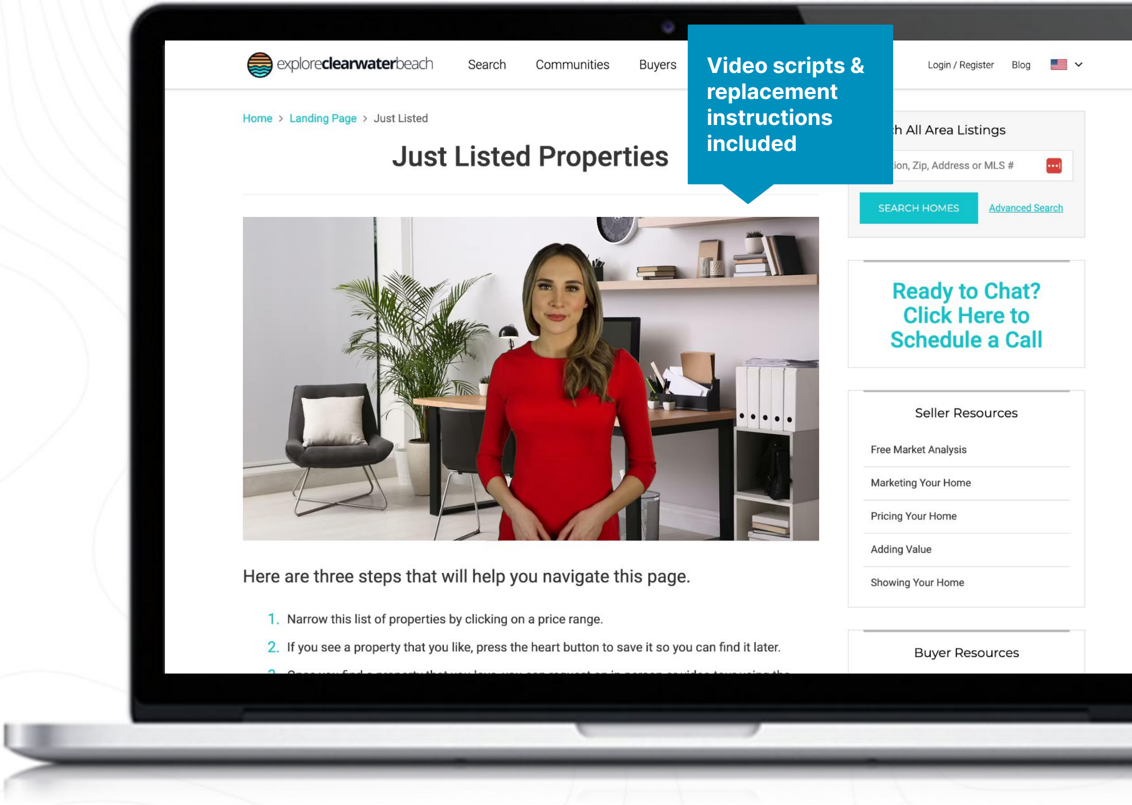
System Pt. 2

Video Landing Pages

We’ve enhanced your website's lead nurturing capabilities with a focus on video.

- All of the landing pages contain a video, properties, and/or a contact form.
- We provide video scripts and guidelines for customization.
- Landing page URL’s are used in text, email, and digital marketing campaigns.
- Personalize the videos to reflect your brand and make the content authentic.



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Landing Page List

General Landing Pages

- Welcome
- Schedule Call
- Careers
- FSBO
- Expired
- Price Reductions
- Just Listed
- Market Watch UPDATED

Buyer Landing Pages

- Buyer General
- First Time Buyers
- Making An Offer
- Escrow, Now What?
- Mortgage Calculator
- Mortgage Pre Approval
- Personalized Home Search
- What Are Closing Costs?

Seller Landing Pages

- Seller General
- Adding Value
- Marketing Your Home
- Free Market Analysis
- Pricing Your Home
- Showing Your Home
- Cash Offer NEW

System Pt. 2

Tags

We integrate tags into your Sierra Interactive account for effortless tracking, triggering of automations, and lead searching.

- Tags are automatically and manually applied.
- Utilize Sierra Interactive's advanced lead search tool to find searchable data points created by tags
- Streamline common lead objections and scenarios handling through automations triggered by “flowchart” tags
- Enhance accountability and uncover missed opportunities with the help of our tracking tags for both you and your team.

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Work the Responses

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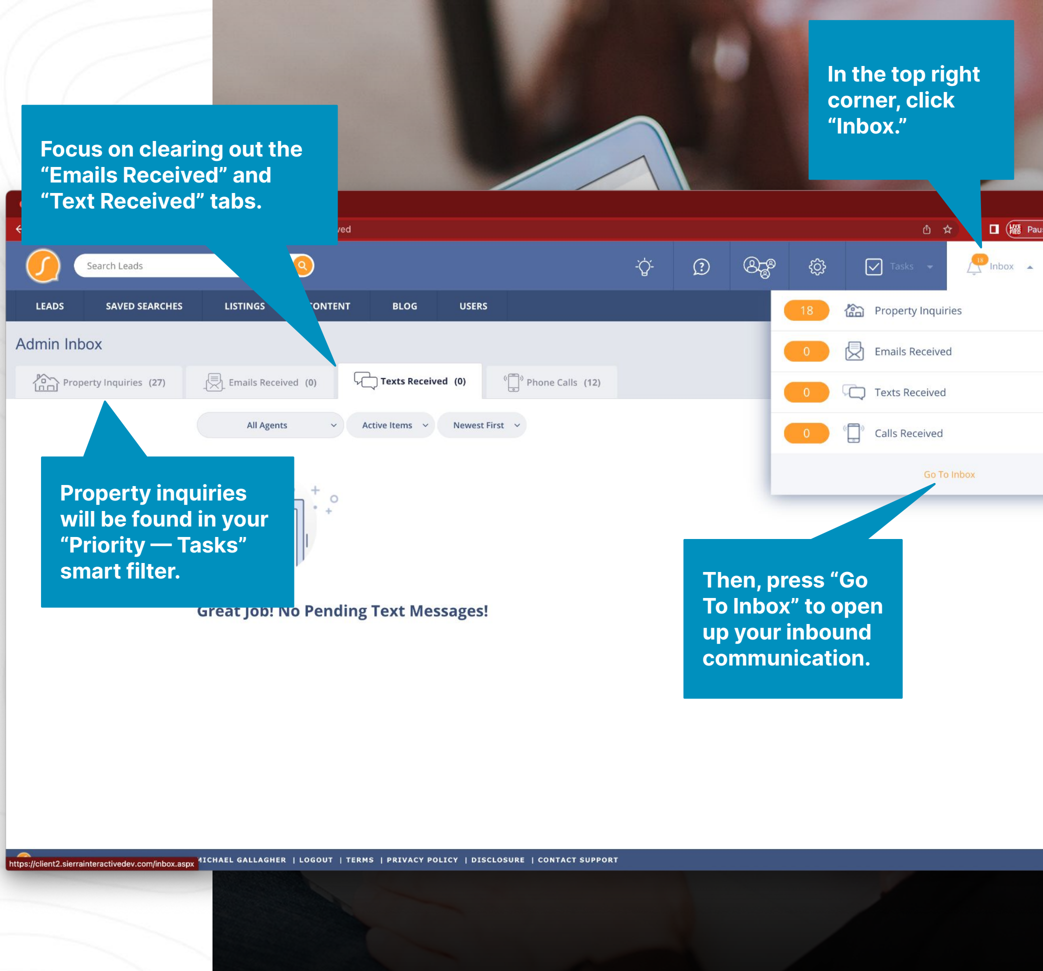
Work the Responses

Inbox

Keep your inbox at zero.

- In the top right corner, click “Inbox”
- Then, press “Go To Inbox” to open up your inbound communication.
- Focus on clearing out the “Emails Received” and “Text Received” tabs.
- Property inquiries will be found in your “Priority — Tasks” smart filter.

If you are using GGMS Assist this portion of the system is automatically maintained for you.



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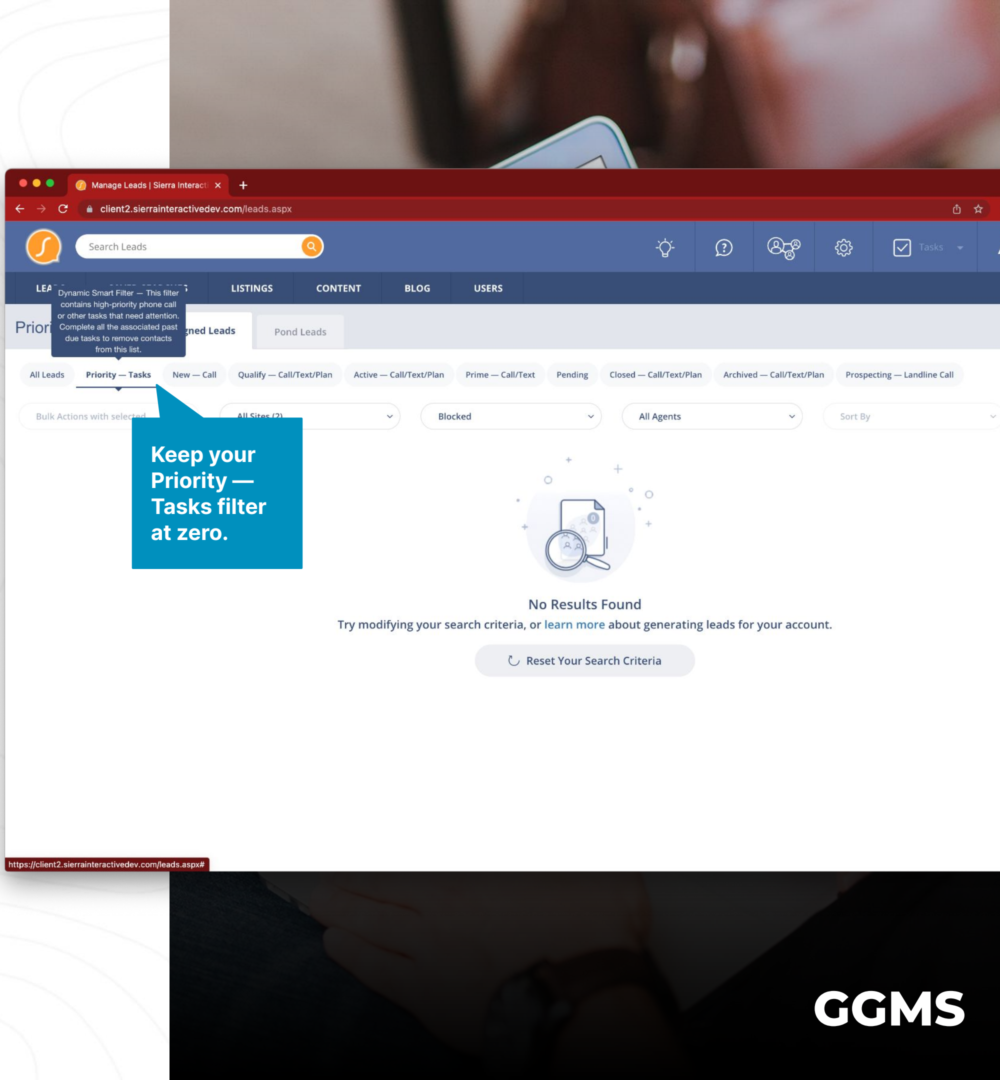
Work the Responses

Priority — Tasks

Keep your Priority — Tasks filter at zero

- **Dynamic Smart Filter —** This filter contains high-priority phone call or other tasks that need attention.
- Complete all the associated past due tasks and mark them complete to remove contacts from this list.
- E-alerts, market updates, action plans, nudging and automations are pushing the best group of leads in your database to this filter.



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