Daily Workflow
- Simplicity
- 15min/day
- Leads/Daily (smart list)
- Hot/2x/week
- Nurture/Monthly
- email or text or call and they fall off list until their next followup
-

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Showcase
- Showing daily workflow - Simplicity for consistency
- mobile app
- Sort contacts by stage and last communication
-

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Follow Up Boss Value
- Work Leads
- Organize Leads
- Single Source of Truth
- See who to follow up with and when
-

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Framework

What you will be learning
- How to use Follow Up Boss & Sisu
- How the pieces fit together

This is more than just learning new technology; it's learning new habits. Which is much more challenging.

To meet the challenge, I've created this structured program to introduce then practice each new skill you will be required to learn to be successful.
There will be assignments to complete (no busy work here this isn't high school). Every concept & skill you learn here can be used to further your career, save yourself time, extend your reach as a professional.

Amy and I have focused countless hours on setting up the infrastructure so that it just works invisibly in the background.

Ultimately the choice to use or not use these technology tools is up to you, but I ask you to suspend your evaluation of the applications and the new processes until you have mastered the skills by using them.

I am committed to your success and adoption of these new tools and processes. I ask you to commit yourself to learning and practicing these new techniques.

Introduction to a Tech Stack

- CRM
- Back End Administration & Analytics
- Lead Generation

Open FUB, Sisu, Zillow

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Introduce me to your Tech Stack

- How Do They Manage Their Contacts?
- How Do they Manage Their Scheduling?
- How Do they Manage Their Communications?
  - Emails, Txts, Phones, Notes

Activity 1

What is a current goal in your life?

Big Ticket item?
Vacation?
Investment?

Find a Visualization of it.

Download and set up App

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The Pieces of the REO Davis Tech Stack in Detail

Purpose of a new tech stack - Growth

Goals of a good CRM
- From the Agent's perspective & Their Business

Follow Up Boss - Our New CRM

SISU - Transaction Management & Analytics

Zillow & IDX Website - Lead Management

Benefits to the Agents' Business
- Centralized hub for all communications
- Note Tracking
- Team Communication Asynchronously
- Faster Lead Response Time - 'Speed to Lead' Statistics
- Automation of texts, emails, reminders, and drip campaigns

The Importance of Data in Today's World
- Data is the new gold
- Data allows leadership to see where we are and plan where we are going

Lead Routing
- Leads come in from Zillow and soon our IDX Website
- Routed to Agents who are in good standing with the brokerage and have completed this training, and demonstrate mastery of the tools and new processes
- Lead sovereignty

Beginning the Work

Summary of Work - We Believe in This

- FUB Accounts Set Up
- Sisu Accounts Set up
- Gmail Accounts Set up
- Zillow Integration

The REO Davis Process Flow
- Data Flow for the Agent
- Data Flow through the Brokerage
- Benefits of a visual process flow

The FUB Interface
- Dashboard
  - Report Tabs
- People
- Inbox
- Calendar

Beginning the Work

Follow Up Boss

The Follow Up Boss **Dashboard** → The FUB Dashboard - Report Tabs

The Follow Up Boss **People** → Smart Lists → Individual People

Smart Lists → All Peoples → Today's Leads → Clients → Leads/Daily → Managing Lists → Creating New Lists

The Follow Up Boss **In Box** → Knowledge Base Article

The Follow Up Boss **Calendar**

The Follow Up Boss **Deals**

Activity 2

Set up Mail forwarding from REO to Gmail

Outlook > Settings Gear > Forwarding > Enable > Enter in Gmail address

Activity 3

Create New Contacts/Leads in FUB

Send CSV file to

Activity 4

Download and Set up Mobile App

Activity 5

Modify and then Create a new action plan

Activity 6

Creating New Smart Lists