

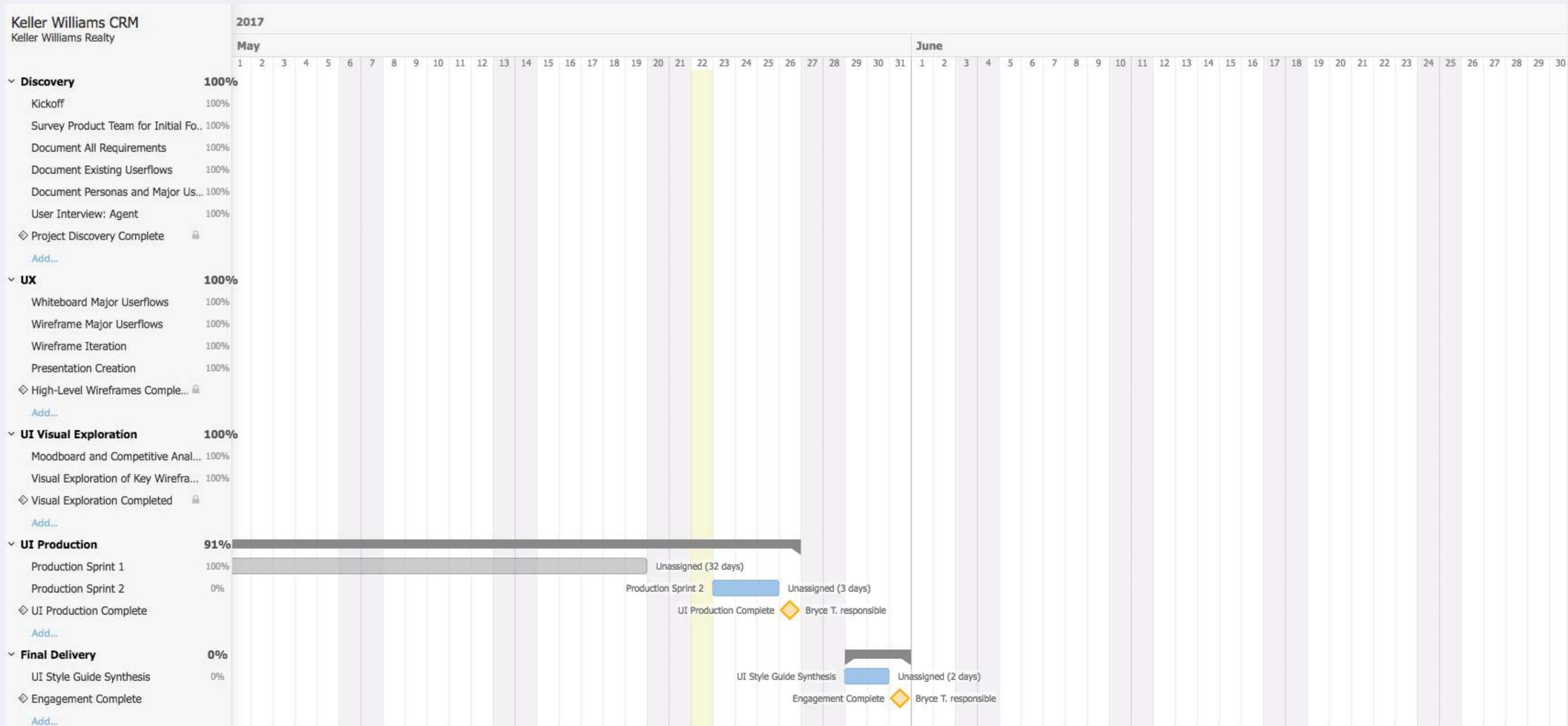




Agenda

- **Agenda**
- **Timeline**
- **Production Deliverables**
 - **Agent**
 - **Admin**
 - **Owner**
 - **Mobile**
- **Next Steps**

Timeline



A wide-angle photograph of a large, two-story stone house during dusk or early evening. The sky is filled with warm, orange and yellow hues from the setting sun. The house features a dark-tiled roof, several arched windows with warm light glowing from within, and a central entrance with a dark door. Two tall, thin evergreen trees stand on either side of the entrance. In the foreground, there's a lawn with several small, round, green shrubs.

Production Agent Experience





MYMETRO

Austin



Tyson Joe



Dashboard



20



1000



Training



Reports



Collapse

Scoreboard

| | MTD | | YTD | |
|----------------|---------|--------|-----------|--------|
| | GOAL | ACTUAL | GOAL | ACTUAL |
| Listings Taken | 23 | 9 | 77 | 9 |
| Buyer Reps | 30 | 12 | 100 | 9 |
| Nurtures | 400 | 1200 | 118 | 9 |
| Sales | 23 | 77 | 4 | 9 |
| Open Houses | 8 | 24 | 2 | 9 |
| MTD Goal | \$20.5k | | \$120.2k | |
| YTD Goal | \$20.5k | | \$1000.2k | |



\$20,500
APRIL GROSS INCOME



100
NEW LEADS

Top Performers

MAR 11 2017 → MAR 31 2017

| | | | | |
|---|--|-----------------|-----|-----------|
| 1 | | Angel Guzman | GCI | \$1120.2k |
| 2 | | Thomas Peterson | GCI | \$750k |
| 3 | | Kellen James | GCI | \$540k |
| 4 | | Sarah Jones | GCI | \$250k |
| 5 | | Kelly Osgood | GCI | 212k |
| 6 | | Ryan Adams | GCI | 200k |
| 7 | | Evan Stillson | GCI | 198k |
| 7 | | Kevin O'Leary | GCI | 120k |

Client Activity

VIEW PEOPLE



1238 Evergreen
Terrace

PENDING

Kevon Sherman

Call Lead

NEW

Text Lead

COMPLETE



1111 Evergreen
Terrace

PENDING

Kevon Sherman

Call Lead

NEW

Tasks Due Today

VIEW TASKS

1230 Hailey Way

Call Lead

Text Lead

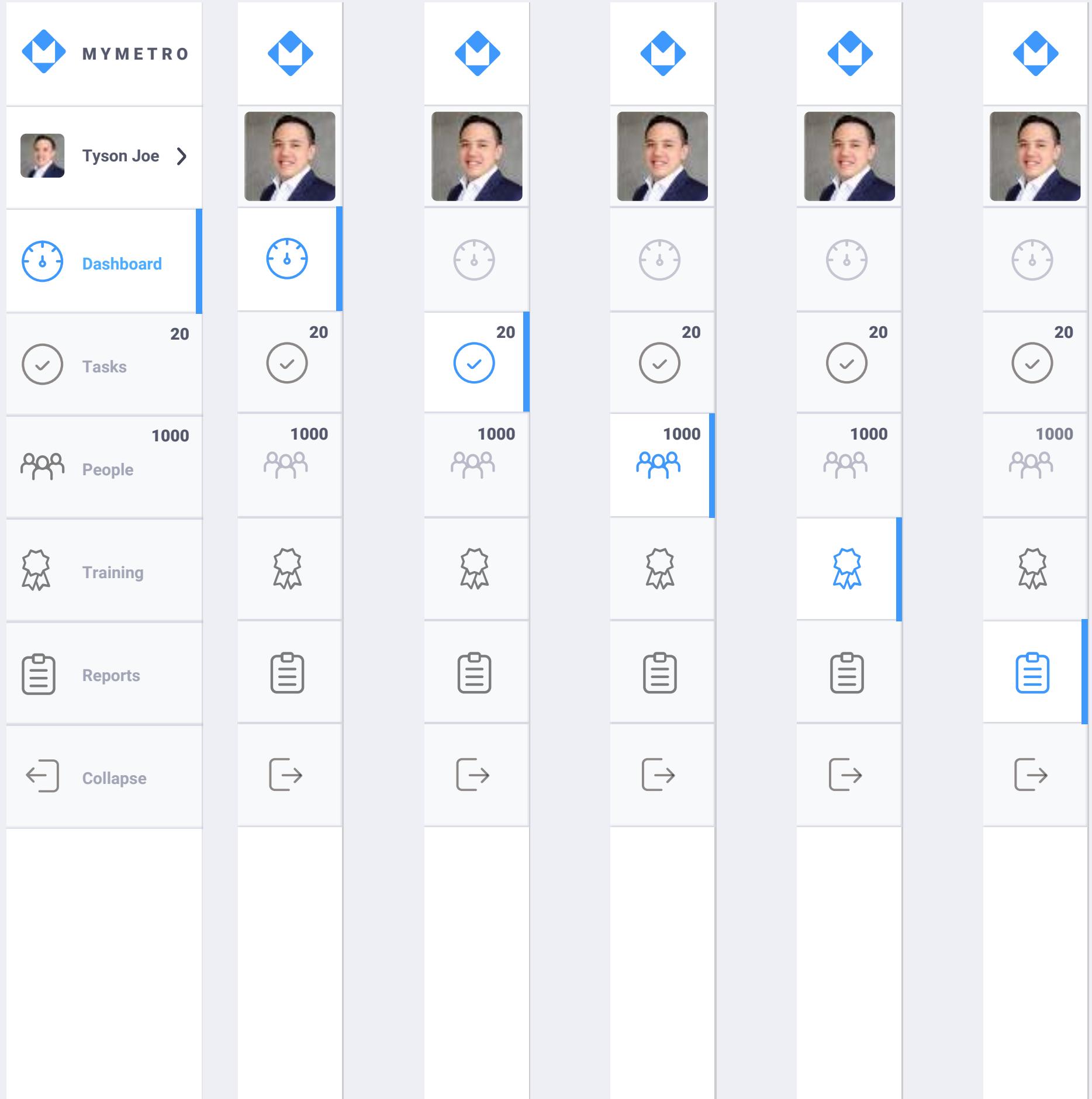
Upload Signing Documentation

Confirm Appointment

1230 Hailey Way

Call Lead

Navigation Experience



GCI Monthly Goal
\$20.5k / \$120.2k

Team Activity

- 1203 Elm St.
Task Name: COMPLETED
- 1203 Elm St.
Task Name: PAST DUE
- 1203 Elm St.
Task Name: NEW
- 1203 Elm St.
Task Name: COMPLETED

Top Performers (MAR 11 2017 - MAR 31 2017)

| Rank | Agent | Office | GCI |
|------|-----------------|--------|-----------|
| 1 | Angel Guzman | GCI | \$1120.2k |
| 2 | Thomas Peterson | GCI | \$750k |
| 3 | Kellen James | GCI | \$540k |
| 4 | Sarah Jones | GCI | \$250k |
| 5 | Kelly Osgood | GCI | 212k |
| 6 | Ryan Adams | GCI | 200k |
| 7 | Evan Stillson | GCI | 198k |
| 7 | Kevin O'Leary | GCI | 120k |

500 GROSS INCOME

100 NEW LEADS

99 NURTURES

Tasks Due Today

- 1230 Hailey Way
 - Call Lead
 - Text Lead
 - Upload Signing Documentation
 - Confirm Appointment
- 1230 Hailey Way
 - Call Lead

1238 Evergreen Terrace

PENDING

Kevon Sherman

- Call Lead: NEW
- Text Lead: COMPLETE

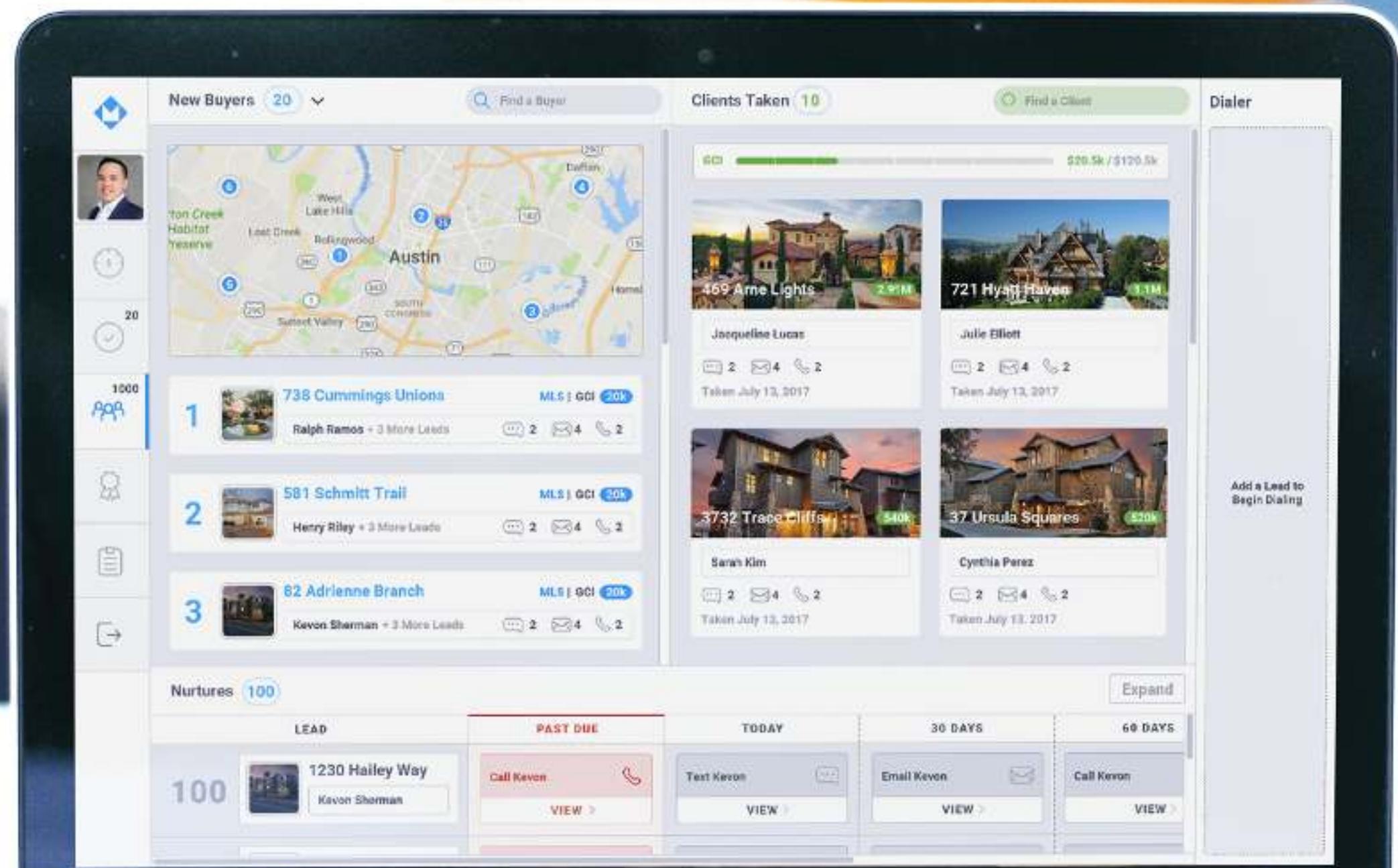
1111 Evergreen Terrace

PENDING

Kevon Sherman

- Call Lead: NEW

Stay on Top Of Leads & Tasks









20



1000



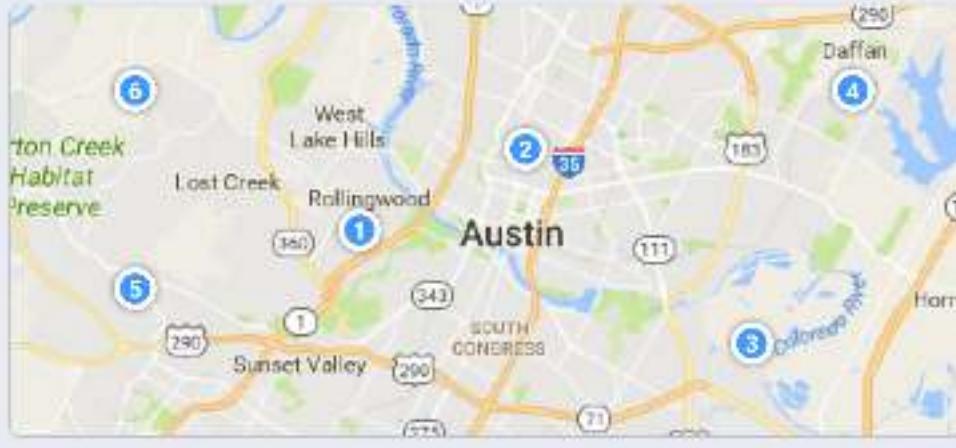






New Buyers 20

Find a Buyer



1  **738 Cummings Unions** MLS | GCI 20k
Ralph Ramos + 3 More Leads 💬 2 📧 4 ☎ 2
Taken July 13, 2017

2  **581 Schmitt Trail** MLS | GCI 20k
Henry Riley + 3 More Leads 💬 2 📧 4 ☎ 2
Taken July 13, 2017

3  **82 Adrienne Branch** MLS | GCI 20k
Kevon Sherman + 3 More Leads 💬 2 📧 4 ☎ 2
Taken July 13, 2017

Clients Taken 10

Find a Client

| | GCI | Value |
|--|---|--------------------|
|  |  | \$20.5k / \$120.5k |
|  |  | \$1.1M |
|  |  | 540k |
|  |  | 520k |

Jacqueline Lucas
💬 2 📧 4 ☎ 2
Taken July 13, 2017

Julie Elliott
💬 2 📧 4 ☎ 2
Taken July 13, 2017

Sarah Kim
💬 2 📧 4 ☎ 2
Taken July 13, 2017

Cynthia Perez
💬 2 📧 4 ☎ 2
Taken July 13, 2017

Dialer

Add a Lead to Begin Dialing

Nurtures 100

Expand

| LEAD | PAST DUE | TODAY | 30 DAYS | 60 DAYS |
|--|--|--|---|--|
| 100  1230 Hailey Way Kevon Sherman | Call Kevon  VIEW > | Text Kevon  VIEW > | Email Kevon  VIEW > | Call Kevon  VIEW > |

Find New Buyers & Sellers

The screenshot displays a real estate CRM application with the following sections:

- New Buyers (20):** A search bar labeled "Find a Buyer" is at the top. Below it is a map of Austin, Texas, with various neighborhoods and landmarks labeled. A sidebar on the left shows a profile picture, a clock icon, and a "20" badge.
- Clients Taken (10):** Shows a GCI progress bar at 100%. Below it are two client cards:
 - 469 Arne Lights:** 2.9M. Listed by Jacqueline Lucas. Taken July 13, 2017.
 - 721 Hyatt Haven:** Listed by Julie Elliott. Taken July 13, 2017.
- Nurtures (100):** A table with columns: LEAD, PAST DUE, TODAY, and 30 DAYS. The first row shows a lead for "1230 Hailey Way" (Kevon Sherman) with buttons to "Call Kevon" (Past Due), "Text Kevon", and "Email Kevon".

The screenshot displays a real estate management application interface. On the left, there is a map with several locations marked by blue circles, labeled with numbers 1 through 4. Below the map, there are three sections, each containing a "Leads" button and a "Taken" button. The first section shows 2 Leads and 4 Taken properties. The second section shows 2 Leads and 4 Taken properties. The third section shows 2 Leads and 4 Taken properties. In the center, there is a "Clients Taken" section with a count of 10. This section includes a "Find a Client" search bar and a progress bar for "GCI" from \$20.5k to \$120.5k. Below this, there are four property cards: 469 Arne Lights (2.91M), 721 Hyatt Haven (1.1M), 3732 Trace Cliffs (540k), and 37 Ursula Squares (520k). Each card includes the agent's name (Jacqueline Lucas, Julie Elliott, Sarah Kim, Cynthia Perez), the date taken (July 13, 2017), and contact statistics (2 messages, 4 emails, 2 calls). At the bottom, there is a "Dialer" section with an "Expand" button and a placeholder text "Add a Lead to Begin Dialing".

Keep Track Of Taken Properties

The screenshot shows a real estate CRM interface with a sidebar on the left containing icons for Home, Leads, Properties, and Reports. The main area displays three leads numbered 1, 2, and 3, each with a thumbnail image, name, and contact information (2 messages, 4 emails, 2 calls). To the right of the leads are two property cards: "3732 Trace Cliffs" and "37 Ursula Squares", both taken on July 13, 2017, with their respective details and contact information.

1 738 Cummings Unions MLS | GCI 20k
Ralph Ramos + 3 More Leads 2 4 2

2 581 Schmitt Trail MLS | GCI 20k
Henry Riley + 3 More Leads 2 4 2

3 82 Adrienne Branch MLS | GCI 20k
Kevon Sherman + 3 More Leads 2 4 2

Nurtures 100 Expand

| LEAD | PAST DUE | TODAY | 30 DAYS | 60 DAYS |
|---------------------------------------|---|---|--|---|
| 100 1230 Hailey Way Kevon Sherman | Call Kevon VIEW > | Text Kevon VIEW > | Email Kevon VIEW > | Call Kevon VIEW > |

Cold Lead? Nurture It!

Nurtures

Tray Expansion

The screenshot displays a real estate management application with several key features:

- Top Bar:** Shows "New Buyers 20", "Clients Taken 10", and "Nurtures 100".
- Map:** A map of Austin, Texas, with various neighborhoods highlighted.
- Client List:** A grid of recent clients, each with a photo, address, and contact information.
- Dialer:** A sidebar for managing leads, showing a list of leads with their names and addresses.
- Nurtures Tray:** A large, expandable section on the right containing a list of leads, categorized by due date (Past Due, Today, 10 Days, 60 Days). Each lead entry includes a photo, address, name, and a "VIEW" button.

Nurture

The Right Leads at the Right Time

The screenshot shows a lead management interface with the following features and data:

- Left Sidebar:** A vertical sidebar with icons and counts:
 - Blue square icon: 100
 - Clock icon: 20
 - People icon: 1000
 - Ribbon icon: 98
 - Document icon: 96
 - Right arrow icon: 95
 - Question mark icon: 94
 - Cloud icon: 93
- Header:** Nurtures (100)
- Filter Bar:** LEAD, PAST DUE, TODAY, 30 DAYS
- Lead List:** A list of leads with their names, addresses, and contact details:
 - 100: 1230 Hailey Way, Kevon Sherman (Call Kevon, View)
 - 99: 5969 Zulauf Tunnel, Lula Cook (Call Lula, View)
 - 98: 87 Cydney Parkway, Etta Davis (Text Etta, View)
 - 97: 770 Douglas Land, Arthur Castro (Email Arthur, View)
 - 96: 98 Stewart Forge, Hester Wilkerson (Email Hester, View)
 - 95: 2567 Gloria Pine, Alfred Stevens (Email Alfred, View)
 - 94: 857 Lemke Shores, Don Romero (Email Don, View)
 - 93: 857 Lemke Shores (Email, View)
- Message Box:** Your Nurtures are Locked. You have overdue tasks on leads. In order to access other leads take care of your past due tasks. [View Tasks](#)

Start Dialing

Review Leads & Nurtures, Record Notes, and Close Faster Than Ever

Ralph Ramos NEW SELLER

Add to Dialer Trash Take Client

Property 738 Cummings Unions Austin, Texas 71723

Map showing location in Austin, Texas.

Image of a modern house with a pool at sunset.

EST. GCI \$20,000

Notes

4/2/2017 @ 1:00PM
Duis viverra velit libero, sed laoreet felis convallis a. Aenean sit amet pulvinar felis, non gravida sem. Duis eget enim maximus, interdum elit ut, ultricies urna. Praesent nisi turpis, fringilla ac nibh sit amet, tempus facilisis nisl. Aenean faucibus dolor dolor, quis molestie diam pulvinar id. Cras enim magna, rhoncus eu est vitae, auctor eleifend lorem. Fusce rhoncus vitae mauris sit amet ornare.

Angel Guzman

4/2/2017 @ 1:00PM
No answer

Angel Guzman

4/2/2017 @ 1:00PM

Enter Note

Send

21 Points of Gain

16 17 18 19 20

Nurture Checklist

- What has you thinking about a move?
- When do you see yourself being ready to make the move?
- I'm assuming you're not already committed to another Realtor, correct?
- When would be the best time to followup?
- I want to go ahead and send you my contact info so you can reach out whenever you want to. What's the best email I can send that to?

Dialer

NEW LEADS

738 Cummings Unions
Ralph Ramos

NURTURES

1230 Hailey Way
Kevon Sherman

5969 Zulauf Tunnel
Lula Cook

CALL-IN-PROGRESS

00:02

Update Nurture End

Beautiful Productivity for Real Estate

The screenshot displays a productivity dashboard for real estate leads. At the top, a header bar includes a logo, the title "Productivity Pulse" with a progress bar at 65%, and status indicators for "45 Tasks Remain" and "120 Completed". A "Property View" toggle switch is also present.

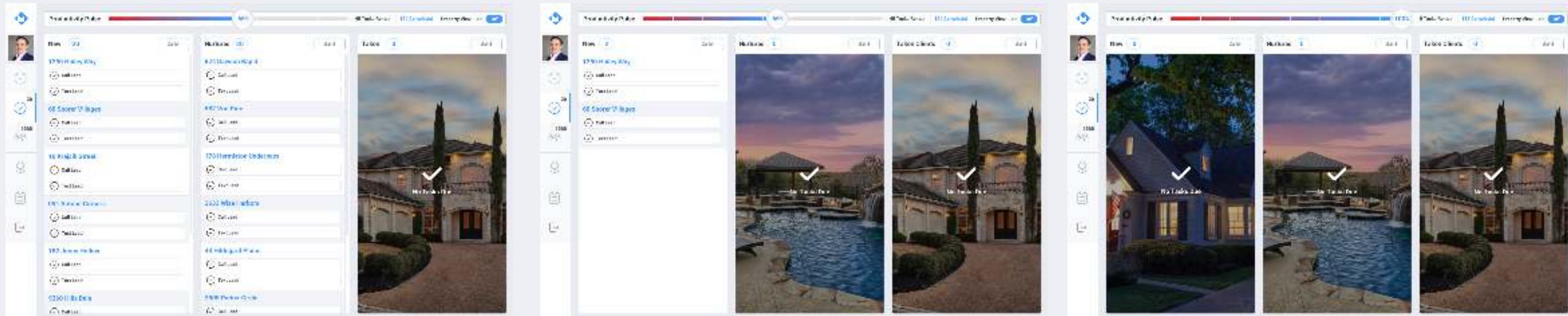
The main interface is organized into three columns representing lead stages:

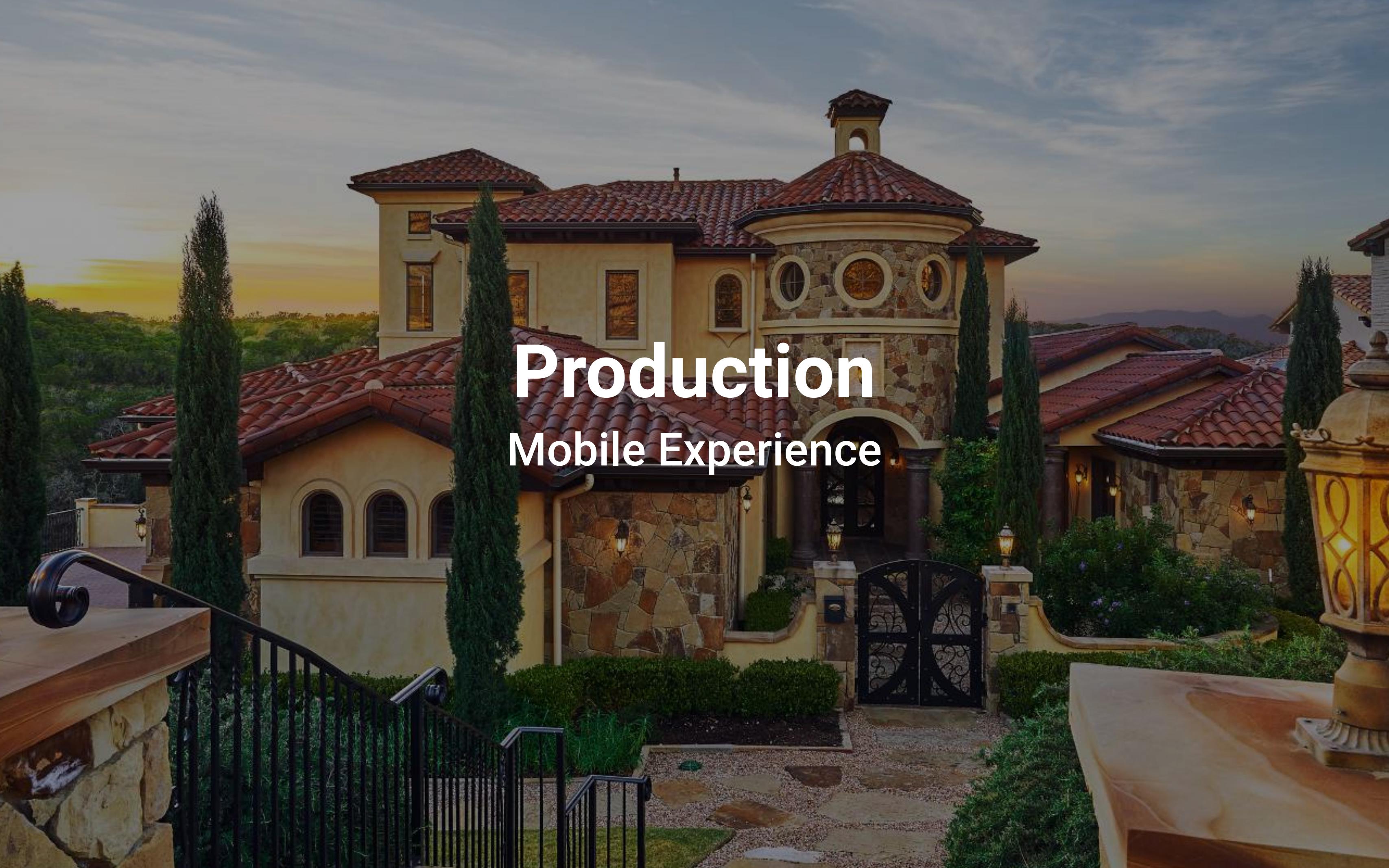
- New (20 tasks):** Contains entries for "1230 Hailey Way", "60 Sporer Villages", "10 Krajcik Street", "091 Antone Corners", "182 Jonas Hollow", and "9360 Hills Dale". Each entry has two options: "Call Lead" and "Text Lead".
- Nurtures (20 tasks):** Contains entries for "824 Dawson Rapid", "587 Von Pine", "178 Hermiston Underpass", "3633 Wiza Harbors", "43 Hildegard Plains", and "2805 Parker Circle". Each entry has two options: "Call Lead" and "Text Lead".
- Taken (20 tasks):** Contains entries for "572 Erich Rapids", "04 Langworth Knoll", "4501 Weber Extensions", and "497 Isabelle Villages". Each entry has two options: "Call Lead" and "Text Lead".

A vertical sidebar on the left provides navigation links and summary statistics:

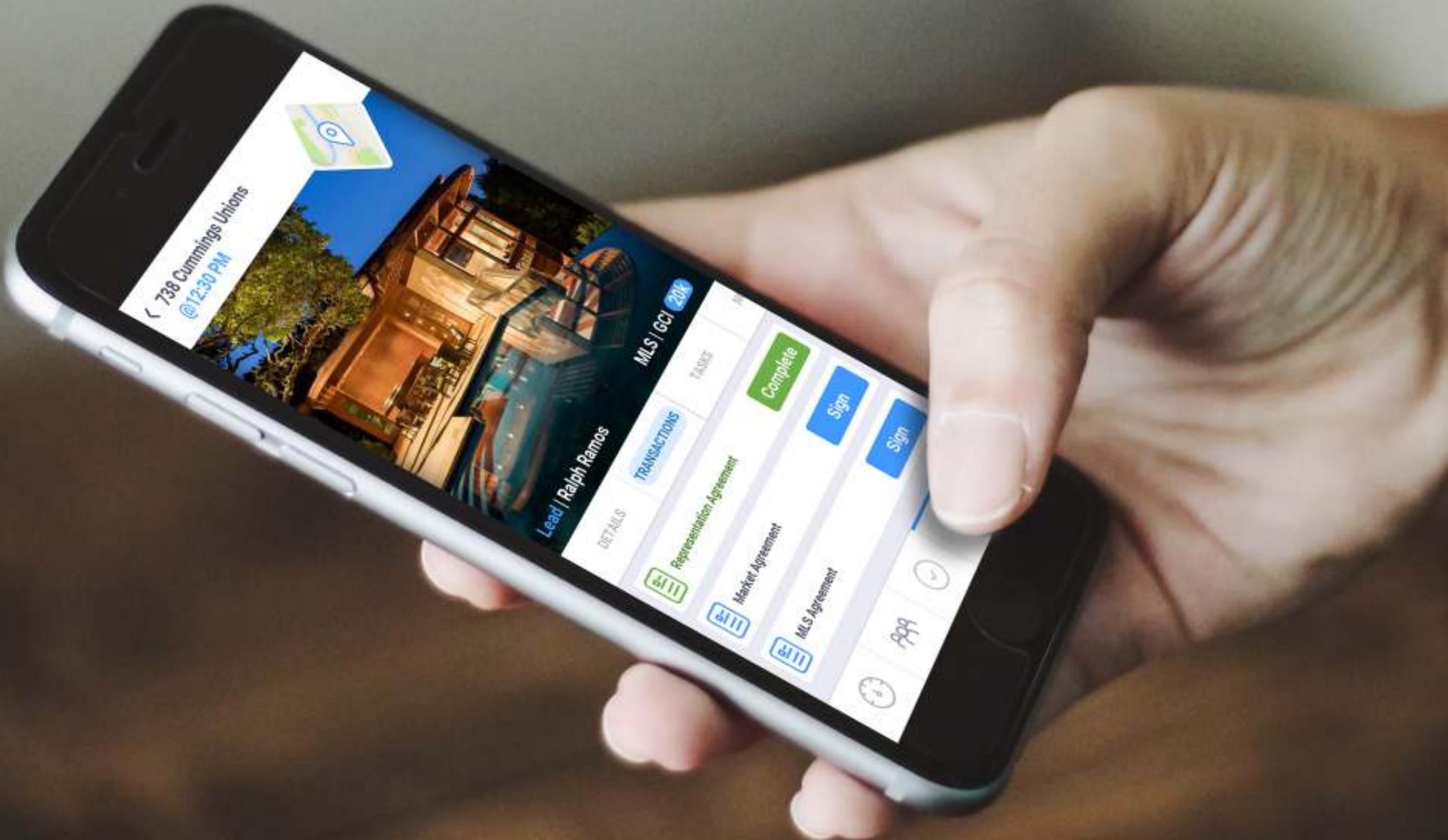
- User icon: "New 20" (highlighted), "Add", "Taken 20", "Completed 1000".
- Lead icon: "Call Lead", "Text Lead".
- Properties icon: "New 20", "Nurtures 20", "Taken 20".
- Task icon: "Call Lead", "Text Lead".
- Help icon: "New 20", "Nurtures 20", "Taken 20".

Beautiful Productivity for Real Estate



A large, ornate Mediterranean-style house with a tiled roof, arched windows, and a stone tower, set against a sunset sky.

Production Mobile Experience



All Your Leads On the Go



Austin, Texas \$20.5k ● \$120.2k

TEAM AVG. GOAL YOU

200
150
100
50
0 4/1 4/15 4/31

\$20,500 APRIL GCI 100 NEW LEADS 99 NURTURES

Upcoming Appointments

738 Cummings Unions @12:30 PM

Lead | Ralph Ramos MLS | GCI 20k

Team Activity

169 Emelia Parkway

Call Lead and Write Notes

NEW

Tyson Joe

FILTER ▾

⌚ POP 📌 ⚡ 📄

This screenshot shows the MYMETRO mobile application interface. At the top, it displays a performance chart for Austin, Texas, comparing Team Avg., Goal, and the user's own performance over three dates. Below the chart are summary statistics for April GCI, new leads, and nurtured leads. A section for "Upcoming Appointments" shows a lead for "738 Cummings Unions" scheduled at 12:30 PM, assigned to "Lead | Ralph Ramos" with an MLS/GCI of 20k. The "Team Activity" section lists a lead for "169 Emelia Parkway" with options to call the lead or write notes, and a "NEW" button. At the bottom, there are five icons: a clock, a person, a location pin, a lightning bolt, and a document.

← 738 Cummings Unions @12:30 PM

Lead | Ralph Ramos MLS | GCI 20k

DETAILS TRANSACTIONS TASKS

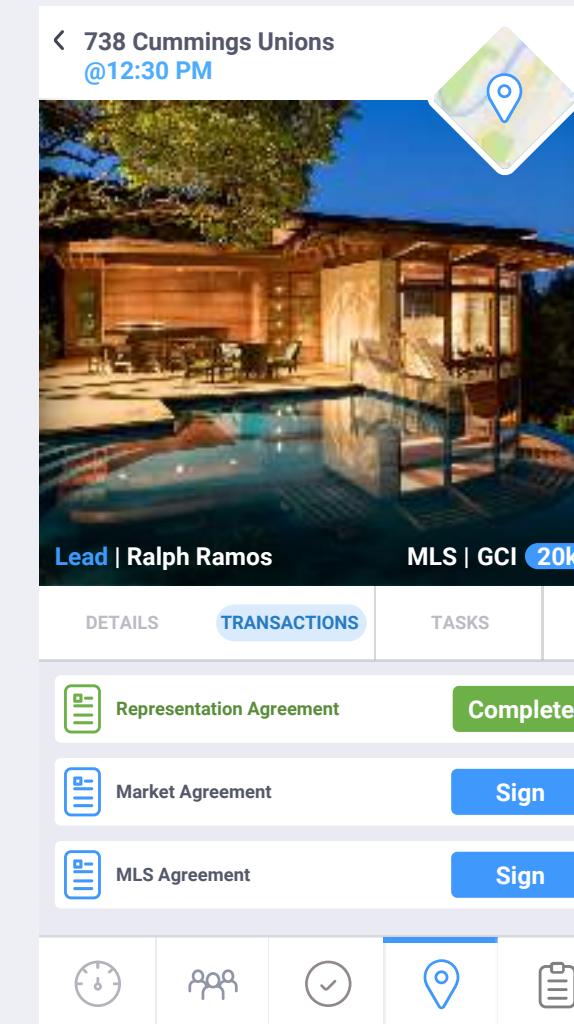
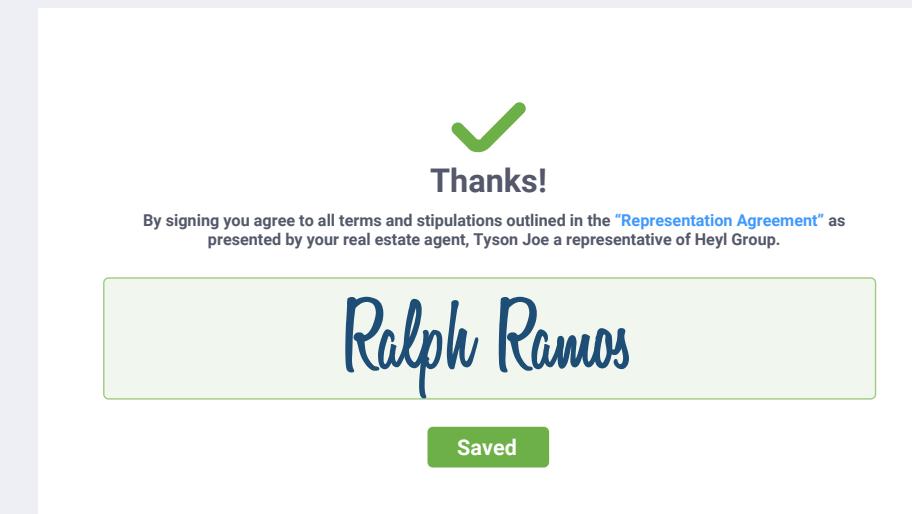
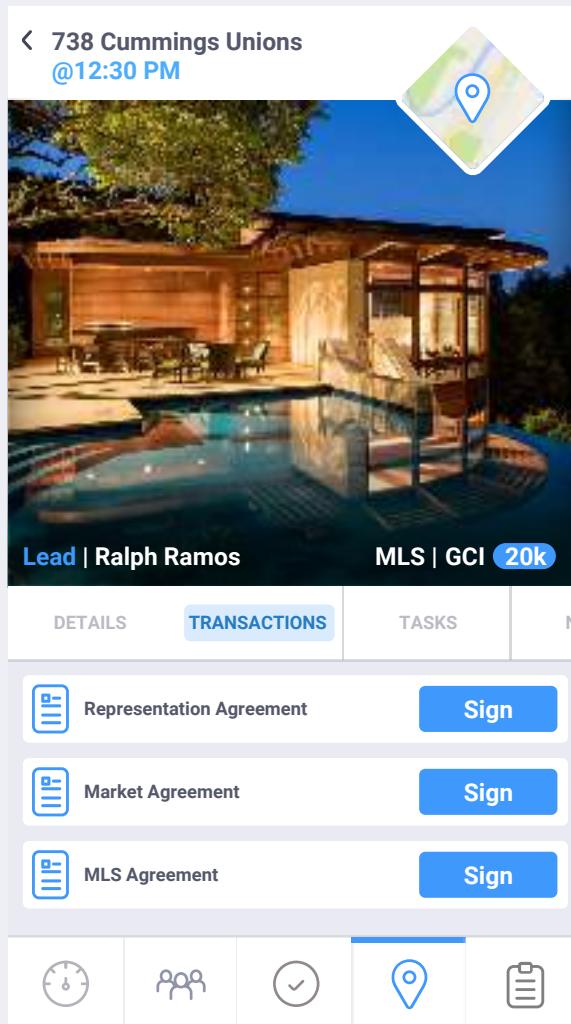
Interior Features

| Laundry | Utility Room |
|---------|-------------------------|
| Kitchen | Breakfast Bar |
| | Granite/Marble Counters |
| | Open to Family Room |
| | Dishwasher |
| | Disposal |
| | Microwave Oven |

⌚ POP 📌 ⚡ 📄

This screenshot shows the details for a specific real estate listing. It includes a navigation bar with back and forward arrows, the lead information ("Lead | Ralph Ramos" at 12:30 PM, MLS/GCI 20k), and tabs for Details, Transactions, and Tasks. The "Interior Features" section is expanded, showing a table with laundry, utility room, kitchen, breakfast bar, granite/marble counters, open to family room, dishwasher, disposal, and microwave oven. At the bottom, there are five icons: a clock, a person, a location pin, a lightning bolt, and a document.

Review Up-to-Date Transaction History & Get Signed





Production Admin Experience





Austin

B+ 120 COMPLETED TASKS
30 TASKS REMAINING

80%
20%

100
80
60
40
20
0

4/1 4/3 4/5 4/8 4/11 4/15 4/19 4/23

Tasks Completed

PENDING PROPERTIES 100

CLOSED PROPERTIES 99

NEW SIGNINGS 12

Client Activity

VIEW PEOPLE

| | | |
|---|------------------------|---------|
| | 1238 Evergreen Terrace | PENDING |
| Kevon Sherman | | |
| <input checked="" type="checkbox"/> Call Lead | NEW | |
| <input checked="" type="checkbox"/> Text Lead | COMPLETE | |

| | | |
|---|------------------------|---------|
| | 1111 Evergreen Terrace | PENDING |
| Rebecca Knight | | |
| <input checked="" type="checkbox"/> Call Lead | NEW | |
| <input checked="" type="checkbox"/> Text Lead | COMPLETE | |

| | | |
|--------------|------------------|---------|
| | 7514 Cole Stream | PENDING |
| Effie Duncan | | |

Tasks Due Today

VIEW TASKS

| |
|--|
| 08 Antonietta Mountain |
| <input checked="" type="checkbox"/> Call Lead |
| <input checked="" type="checkbox"/> Text Lead |
| <input checked="" type="checkbox"/> Upload Signing Documentation |
| <input checked="" type="checkbox"/> Confirm Appointment |
| 3181 Kayla Run |
| <input checked="" type="checkbox"/> Call Lead |
| <input checked="" type="checkbox"/> Text Lead |
| 7728 Bartell Ramp |
| <input checked="" type="checkbox"/> Call Lead |

Team Activity

1203 Elm St.

Task Name
COMPLETED

Tyson Joe

1203 Elm St.

Task Name
PAST DUE

Tyson Joe

1203 Elm St.

Task Name
NEW

Tyson Joe

1203 Elm St.

Task Name
COMPLETED

Tyson Joe

MY METRO

RULES

ACCOUNT

SIGN OUT

COMPLETED TASKS

STEPS REMAINING

PENDING PROPERTIES 100

CLOSED PROPERTIES 99

NEW SIGNINGS 12

Tasks Due Today

- 08 Antonietta Mountain**
 - Call Lead
 - Text Lead
 - Upload Signing Documentation
 - Confirm Appointment
- 3181 Kayla Run**
 - Call Lead
 - Text Lead
- 7728 Bartell Ramp**
 - Call Lead

Team Activity

- 1203 Elm St.**
 - Task Name
 - COMPLETED**
- Tyson Joe**
- 1203 Elm St.**
 - Task Name
 - PAST DUE**
- Tyson Joe**
- 1203 Elm St.**
 - Task Name
 - NEW**
- Tyson Joe**
- 1203 Elm St.**
 - Task Name
 - COMPLETED**
- Tyson Joe**

Lillian Jo..

Dashboard

20 Tasks

1000 People

Listings

Reports

Collapse

Collapse

Completed Tasks

60 Tasks Completed

80% 20%

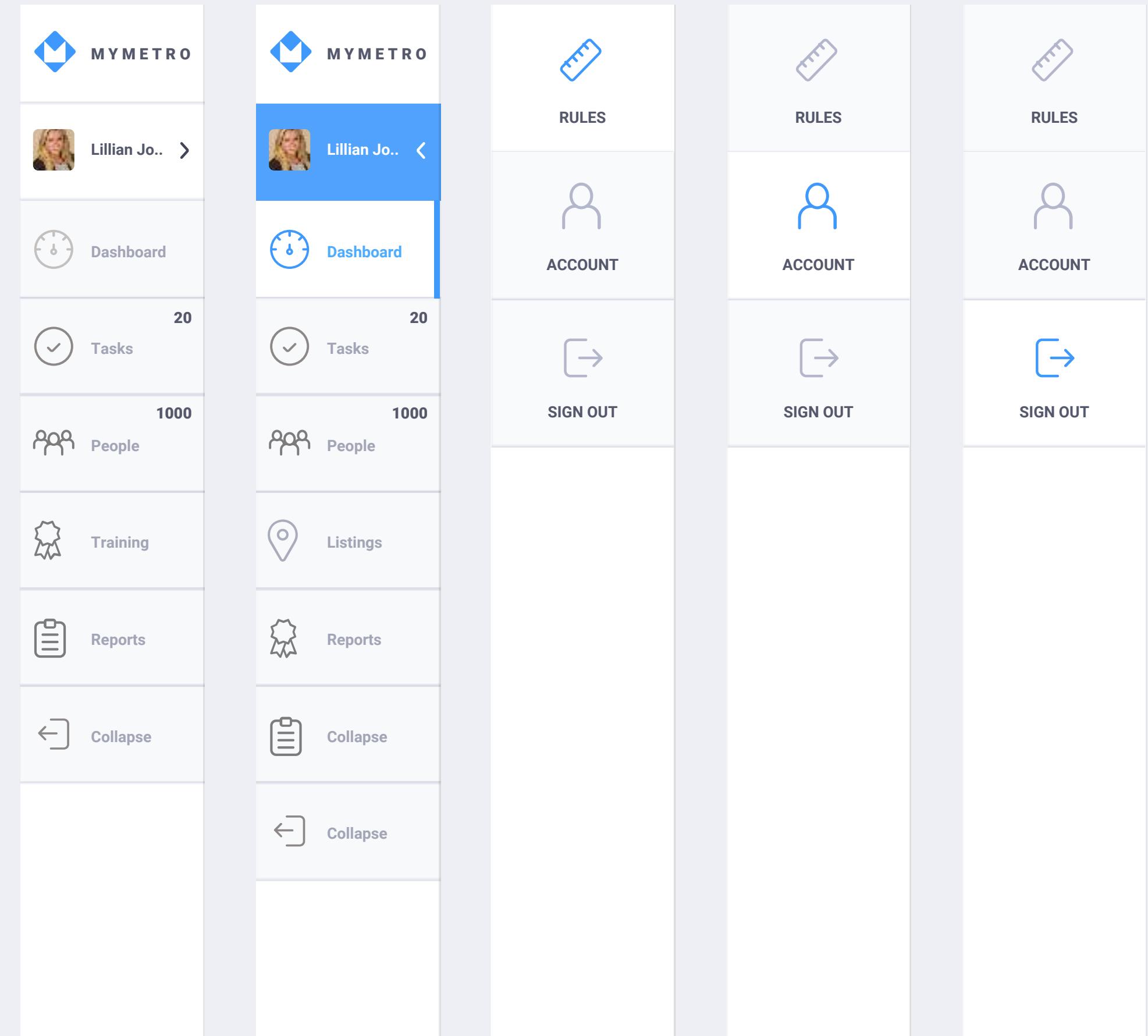
4/5 4/8 4/11 4/15 4/19 4/23

VIEW PEOPLE

| Address | Status |
|---|-----------------|
| 1238 Evergreen Terrace | PENDING |
| Kevon Sherman | |
| <input checked="" type="checkbox"/> Call Lead | NEW |
| <input checked="" type="checkbox"/> Text Lead | COMPLETE |
| 1111 Evergreen Terrace | PENDING |
| Rebecca Knight | |
| <input checked="" type="checkbox"/> Call Lead | NEW |
| <input checked="" type="checkbox"/> Text Lead | COMPLETE |
| 7514 Cole Stream | PENDING |
| Effie Duncan | |

Navigation

Finding Rules and Account Information



Rules

Set Conditional Tasks
for Property Changes

The screenshot shows the MYMETRO platform interface. On the left is a vertical sidebar with the user profile 'Lillian Jo...' and several menu items: Dashboard (20), Tasks (20), People (1000), Listings, Reports, Collapse, and another Collapse button. The main area is titled 'Rules' and contains two sections: 'Properties' and 'Leads'. The 'Properties' section features a blue icon of a building and a 'View' button. The 'Leads' section features a green icon of three people and a 'View' button. Both sections contain descriptive text about how they automatically generate tasks for employees or new users.

Properties

When properties change status, create automatically generated tasks for all of your employees so that you don't have to manually assign to the same people over and over.

View

Leads

Whenever a new person is added to the platform, generate a set amount of tasks to get them training and onboarded to your process.

View

Rules

Set Conditional Tasks for Property Changes

The screenshot shows the MYMETRO software interface with the title 'Property Rules'. The top navigation bar includes a logo, user profile (Lillian Jo...), and a back arrow. Below the navigation is a sidebar with the following items:

- Dashboard (selected)
- Tasks (20)
- People (1000)
- Listings
- Reports
- Collapse
- Collapse

The main content area is titled 'Property Rules' with a subtitle: "When properties change status, create automatically generated tasks for all of your employees so that you don't have to manually people over and over." It features three sections: 'Active', 'Pending', and 'Sold'.

Active Section:

| Order | User | Action | Timeframe | Remove |
|-------|---------------|------------|-----------|--------|
| 1 | John Doe | Call Lead | 2 Days | X |
| 2 | Jane Smith | Text Lead | 1 Days | X |
| 3 | Mike Johnson | Email Lead | 0 Days | X |
| 4 | David Lee | Call Lead | 5 Days | X |
| 5 | Sarah White | Call Lead | 2 Days | X |
| 6 | Emily Green | Text Lead | 1 Days | X |
| 7 | Alex Blue | Email Lead | 0 Days | X |
| 8 | Chris Red | Call Lead | 5 Days | X |
| 10 | Sam Black | Call Lead | 2 Days | X |
| 11 | Olivia Purple | Text Lead | 1 Days | X |

Pending Section:

| Order | User | Action | Timeframe | Remove |
|-------|--------------|------------|-----------|--------|
| 1 | John Doe | Call Lead | 2 Days | X |
| 2 | Jane Smith | Text Lead | 1 Days | X |
| 3 | Mike Johnson | Email Lead | 0 Days | X |
| 4 | David Lee | Call Lead | 5 Days | X |
| 5 | Sarah White | Call Lead | 2 Days | X |

Sold Section:

| Order | User | Action | Timeframe | Remove |
|-------|------------|-----------|-----------|--------|
| 1 | John Doe | Call Lead | 2 Days | X |
| 2 | Jane Smith | Text Lead | 1 Days | X |

Properties

Easily Check on Tasks and Status

Austin Properties

Find a Property Filter MAP On Off

| Property | Agent | Lead | Status |
|------------------------|-----------|----------------|---------|
| 1238 Evergreen Terrace | Tyson Joe | Kevon Sherman | PENDING |
| 34 Kulas Court | Tyson Joe | Jeffery Allen | SIGNED |
| 301 Yvonne Stream | Tyson Joe | Kathryn Frank | SIGNED |
| 953 Teagan Squares | Tyson Joe | Ronnie Arnold | SIGNED |
| 044 Mertie Lake | Tyson Joe | Eula Pittman | NEW |
| 85 West Motorway | Tyson Joe | Jeffery Carson | NEW |
| 41 Jerde Shore | Tyson Joe | Allie Fuller | |

MYMETRO

- Lillian Jo.. >
- Dashboard
- Tasks 20
- People 1000
- Listings
- Reports
- Collapse
- Collapse

Map View

Get the Big Picture

Austin Properties

1238 Evergreen Terrace
Agent: Tyson Joe Lead: Kevin Sherman
Status: PENDING

1345 Kulan Court
Agent: Tyson Joe Lead: Jeffrey Allen
Status: SIGNED

301 Yvonne Stream
Agent: Tyson Joe Lead: Kathryn Park
Status: SIGNED

953 Teagan Squares
Agent: Tyson Joe Lead: Robbie Arnold
Status: SIGNED

044 Merle Lake
Agent: Tyson Joe Lead: Cole Pittman
Status: NEW

85 West Motorway
Agent: Tyson Joe Lead: Jeffrey Canyon
Status: NEW

41 Jerde Shore
Agent: Tyson Joe Lead: Alvin Parker
Status: NEW

Austin Properties

1238 Evergreen Terrace

The map shows the location of 1238 Evergreen Terrace in Austin, Texas, with surrounding landmarks like Barton Creek, Barton Springs, and the University of Texas at Austin.

Property

Review Details, Tasks, and More

MYMETRO

Lillian Jo... >

Dashboard

Tasks 20

People 1000

Listings

Reports

Collapse

Collapse

1230 Hailey Way, Austin Texas 78120

Angel Guzman
AGENT

Kevon Sherman
LEAD

PENDING

TASKS 14 NOTES 2 SIGNED 4

Details

Transactions

Tasks

Notes

Interior Features

| | | | | | |
|---------|---|-----------------|--|-------------|----------------|
| Laundry | Utility Room | Floor Coverings | Carpet Hard Tile | Bathroom | Walk-In Shower |
| Kitchen | Kitchen Breakfast Bar Granite/Marble Counters Open to Family Room Dishwasher Disposal Microwave Oven Range-Free Standing Single Oven | Dining Room | Breakfast Area | Family Room | Family Room |
| Bedroom | Bedroom Master Bedroom on Main Level Walk-In Closet | Misc. Rooms | Bedroom/Office Family Room Foyer Pantry Utility Room | | |

Exterior Features

Austin area map showing the location of the property.

Property

Review Details, Tasks, and More

MYMETRO

Lillian Jo... >

Dashboard

Tasks 20

People 1000

Listings

Reports

Collapse

Collapse

Angel Guzman
AGENT

Kevon Sherman
LEAD

PENDING

TASKS 14

NOTES 2

SIGNED 4

Details

Transactions

Tasks

Notes

Representation Agreement

Market Agreement

MLS Agreement

Comp

Sig

Sig

360

183

1

West Lake Hills

Rollingwood

Austin

360

1

343

1

290

275

71

SOUTH CONGRESS

SUNSET VALLEY

SOUTHEAST AUSTIN

Bluff Springs

Colton

Manchaca

NORTH L...

Colorado River

35

111

18

Austin-Berg Internat...

Property

Review Details, Tasks, and More

MYMETRO

1230 Hailey Way, Austin Texas 78120

Lillian Jo... >

Dashboard

Tasks

People

Listings

Reports

Collapse

Collapse

Angel Guzman
AGENT

Kevon Sherman
LEAD

PENDING

TASKS 14 NOTES 2 SIGNED 4

Details Transactions Tasks Notes

Active

Completed

Call Lead 2 Days

Call Lead 2 Days

Call Lead 2 Days

Call Lead 2 D

Text Lead 2 D

Call Lead 2 D

Property

Review Details, Tasks, and More

MYMETRO

Lillian Jo... >

Dashboard

Tasks 20

People 1000

Listings

Reports

Collapse

Collapse

Angel Guzman AGENT Kevon Sherman LEAD PENDING TASKS 14 NOTES 2 SIGNED 4

Details Transactions Tasks Notes

4/2/2017 @ 1:00PM
Duis viverra velit libero, sed laoreet felis convallis a. Aenean sit amet pulvinar felis, non gravida sem. Duis eget enim maximus, interdum elit ut, ultricies urna. Praesent nisi turpis, fringilla ac nibh sit amet, tempus facilisis nisi. Aenean faucibus dolor dolor, quis molestie diam pulvinar id. Cras enim magna, rhoncus eu est vitae, auctor eleifend lorem. Fusce rhoncus vitae mauris sit amet ornare.

Angel Guzman

Enter Note

35

Supercharged Task Organization For Real Estate

The image displays two side-by-side screenshots of a real estate task management application. Both screens show a top navigation bar with 'Productivity Pulse' (65%), '45 Tasks Remain', '123 Completed', 'Property View' (On), and a toggle switch.

Left Screen (Pending Tasks):

- Pending:** 20
- 1230 Hailley Way: Call Lead, Text Lead
- 824 Dawson Rapid: Call Lead, Text Lead
- 50 Sporer Villages: Call Lead, Text Lead
- 10 Krajcik Street: Call Lead, Text Lead
- 178 Horniston Underpass: Call Lead, Text Lead
- 3633 Wiza Herbore: Call Lead, Text Lead
- 497 Isabelle Villages: Call Lead, Text Lead
- 182 Jonas Hollow: Call Lead, Text Lead
- 2805 Parker Circle: Call Lead

Right Screen (Active Tasks):

- 1238 Evergreen Terrace:** Agent: Tyson Joe, Lead: Kevin Sherman, EST. SCI: \$30,000
- Tasks:** 14, Notes: 2, Signed: 2, Pending: 4
- Active:** 10 tasks, each assigned to 1 lead, duration 2 days.
- Completed:** 8 tasks, each assigned to 1 lead, duration 2 days.
- 20 Cole Ford:** Agent: Tyson Joe, Lead: Kevin Sherman, EST. SCI: \$20,000
- Tasks:** 14, Notes: 2, Signed: 2, Pending: 4
- Active:** 10 tasks, each assigned to 1 lead, duration 2 days.
- Completed:** 8 tasks, each assigned to 1 lead, duration 2 days.

Switch to a Metro

Or View All Metros. It's Easy.

The screenshot displays a real estate management software interface with the following key features and data points:

- Austin Performance Metrics:** A chart showing Tasks Completed over time (4/1 to 4/23). The chart indicates a peak of 60 tasks completed on April 15th. Other cities shown are Denver, San Antonio, and All Cities.
- Pending Properties:** 100 pending properties.
- Closed Properties:** 99 closed properties.
- New Signings:** 12 new signings.
- Client Activity:** Lists properties for 1238 Evergreen Terrace (Kevon Sherman) and 1111 Evergreen Terrace (Rebecca Knight), along with lead follow-up tasks (Call Lead, Text Lead).
- Tasks Due Today:** Tasks listed for 08 Antonietta Mountain and 3181 Kayla Run, including Call Lead, Text Lead, Upload Signing Documentation, and Confirm Appointment.
- Team Activity:** A sidebar showing activity for 1203 Elm St. (Tyson Joe) across three categories: Task Name (Completed, Past Due, New).

Switch to a Metro

Or View All Metros. It's Easy.

All Cities

B+ 120 COMPLETED 30 TASKS REMAINING

Austin Denver 80% 20%

San Antonio All Cities

60 Tasks Completed

Client Activity

VIEW PEOPLE

| Property Address | Status | Actions |
|-------------------|---------|--|
| 901 Syble Via | PENDING | <input checked="" type="checkbox"/> Call Lead <input checked="" type="checkbox"/> Text Lead |
| 5105 Alisa Shoals | PENDING | <input checked="" type="checkbox"/> Call Lead <input checked="" type="checkbox"/> Text Lead |
| 13 Howe Falls | PENDING | <input checked="" type="checkbox"/> Call Lead <input checked="" type="checkbox"/> Text Lead |

Tasks Due Today

VIEW TASKS

| Address | Task Details |
|------------------------|---|
| 08 Antonietta Mountain | <input checked="" type="checkbox"/> Call Lead <input checked="" type="checkbox"/> Text Lead <input checked="" type="checkbox"/> Upload Signing Documentation <input checked="" type="checkbox"/> Confirm Appointment |
| 3181 Kayla Run | <input checked="" type="checkbox"/> Call Lead <input checked="" type="checkbox"/> Text Lead |
| 7728 Bartell Ramp | |

Team Activity

| Location | Task Status | Assigned To |
|--------------|-------------|----------------|
| 1203 Elm St. | COMPLETED | Tyson Joe |
| 1203 Elm St. | PAST DUE | Mason Morales |
| 1203 Elm St. | NEW | Mayme Perry |
| 1203 Elm St. | COMPLETED | Leila Harrison |

Switch to a Metro

Or View All Metros. It's Easy.

All Cities

MYMETRO

Lillian Joe...

Dashboard

FUTURE PROPERTIES 1000

OPEN DEALS 20

Tasks Due 1203 Elm St. Task Name COMPLETED

Open Requests 999

People 1000

Completed 1203 Elm St. Task Name PAST DUE

Open Listings 1201

Reports

Collapse

Client Activity

- 301 Sylvie Vale: Done
- 5001 Keweenaw: Not Yet
- 5105 Alba Shores: To Do
- 5205 Kaitlyn Ridge: To Do
- 5305 House Park: To Do

Tasks Due Today

- 301 Sylvie Vale: To Do
- 5001 Keweenaw: To Do
- 5105 Alba Shores: To Do
- 5205 Kaitlyn Ridge: To Do
- 5305 House Park: To Do

All Properties

Find a Property Filter MAP On Off

| Property | Agent | Lead | Est. GCI | Status |
|------------------------|-----------|----------------|----------|---------|
| 1238 Evergreen Terrace | Tyson Joe | Kevon Sherman | \$20,000 | PENDING |
| 34 Kulas Court | Tyson Joe | Jeffery Allen | \$20,000 | SIGNED |
| 301 Yvonne Stream | Tyson Joe | Kathryn Frank | \$20,000 | SIGNED |
| 953 Teagan Squares | Tyson Joe | Ronnie Arnold | \$20,000 | SIGNED |
| 044 Mertie Lake | Tyson Joe | Eula Pittman | \$20,000 | NEW |
| 85 West Motorway | Tyson Joe | Jeffery Carson | \$20,000 | NEW |
| 41 Jerde Shore | Tyson Joe | Allie Fuller | \$20,000 | NEW |

Team Activity

- 1203 Elm St. Task Name COMPLETED
- 1203 Elm St. Task Name PAST DUE
- 1203 Elm St. Task Name NEW
- 1203 Elm St. Task Name COMPLETED
- 1203 Elm St. Task Name PAST DUE
- 1203 Elm St. Task Name NEW
- 1203 Elm St. Task Name COMPLETED
- 1203 Elm St. Task Name PAST DUE
- 1203 Elm St. Task Name NEW
- 1203 Elm St. Task Name COMPLETED
- 1203 Elm St. Task Name PAST DUE
- 1203 Elm St. Task Name NEW

A nighttime photograph of a Mediterranean-style residential complex. In the foreground, a stone-paved terrace features a black metal chair with a patterned cushion. To the right is a large, illuminated swimming pool. The background shows several multi-story buildings with warm lights glowing from their windows, surrounded by lush greenery and trees.

Production Owner Experience



The image shows a laptop screen displaying a real estate management software application. The interface is designed for tracking performance across multiple locations.

Header:

- GCI Monthly Goal: \$1.2M / \$4.5M
- Team Activity

Sidebar (Left):

- Solo Agent
- Assistant
- Admin
- Listing Coordinator
- Marketing Director
- Manager
- Marketplace

Austin Scoreboard:

| | GOAL | MTD | ACTUAL | YTD | ACTUAL |
|----------------|------|------|--------|-----|--------|
| Listings Taken | 23 | 9 | 77 | 9 | 9 |
| Buyer Reps | 30 | 12 | 100 | 9 | 9 |
| Nurtures | 400 | 1200 | 118 | 9 | 9 |
| Sales | 23 | 77 | 4 | 9 | 9 |
| Open Houses | 8 | 24 | 2 | 9 | 9 |

MTD Goal: \$20.5k YTD Goal: \$20.5k

Denver Scoreboard:

| | GOAL | MTD | ACTUAL | YTD | ACTUAL |
|----------------|------|------|--------|-----|--------|
| Listings Taken | 23 | 9 | 77 | 9 | 9 |
| Buyer Reps | 30 | 12 | 100 | 9 | 9 |
| Nurtures | 400 | 1200 | 118 | 9 | 9 |
| Sales | 23 | 77 | 4 | 9 | 9 |
| Open Houses | 8 | 24 | 2 | 9 | 9 |

MTD Goal: \$20.5k YTD Goal: \$20.5k

Dallas Scoreboard:

| | GOAL | MTD | ACTUAL | YTD | ACTUAL |
|----------------|------|------|--------|-----|--------|
| Listings Taken | 23 | 9 | 77 | 9 | 9 |
| Buyer Reps | 30 | 12 | 100 | 9 | 9 |
| Nurtures | 400 | 1200 | 118 | 9 | 9 |
| Sales | 23 | 77 | 4 | 9 | 9 |
| Open Houses | 8 | 24 | 2 | 9 | 9 |

MTD Goal: \$20.5k YTD Goal: \$20.5k

San Antonio Scoreboard:

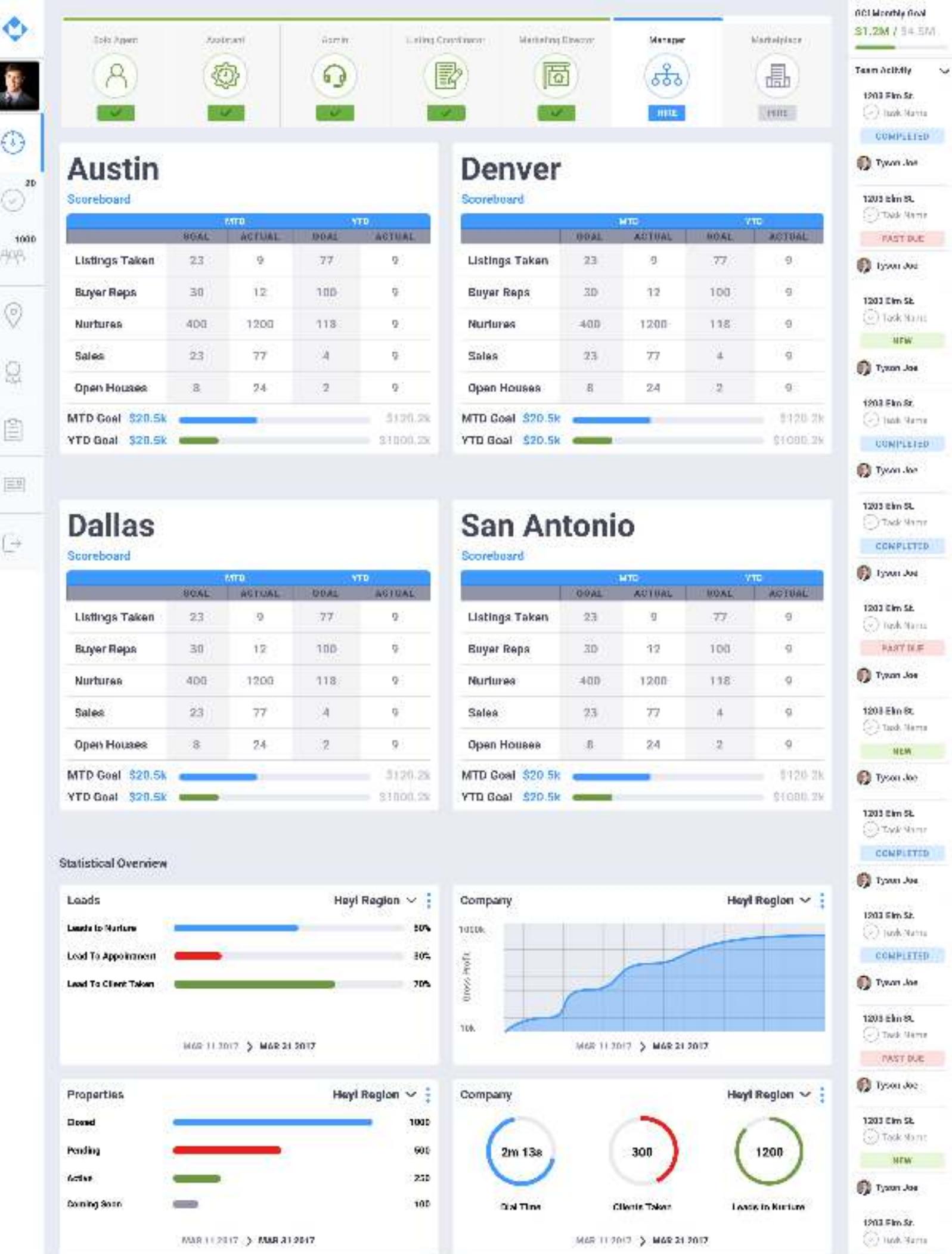
| | GOAL | MTD | ACTUAL | YTD | ACTUAL |
|----------------|------|------|--------|-----|--------|
| Listings Taken | 23 | 9 | 77 | 9 | 9 |
| Buyer Reps | 30 | 12 | 100 | 9 | 9 |
| Nurtures | 400 | 1200 | 118 | 9 | 9 |
| Sales | 23 | 77 | 4 | 9 | 9 |
| Open Houses | 8 | 24 | 2 | 9 | 9 |

MTD Goal: \$20.5k YTD Goal: \$20.5k

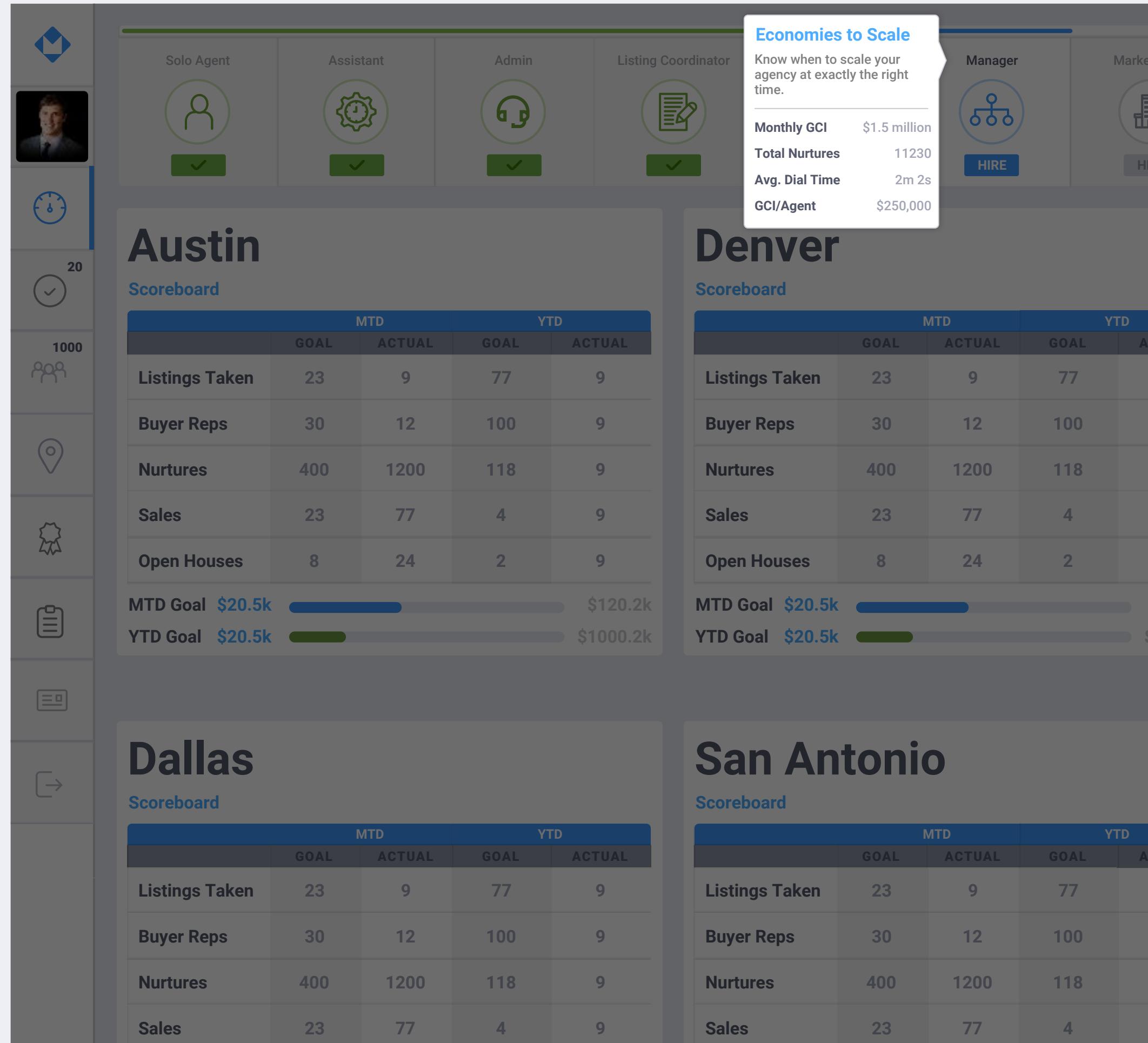
Task List (Right):

- 1203 Elm St. Task Name: COMPLETED
- 1203 Elm St. Task Name: PAST DUE
- 1203 Elm St. Task Name: NEW
- 1203 Elm St. Task Name: COMPLETED

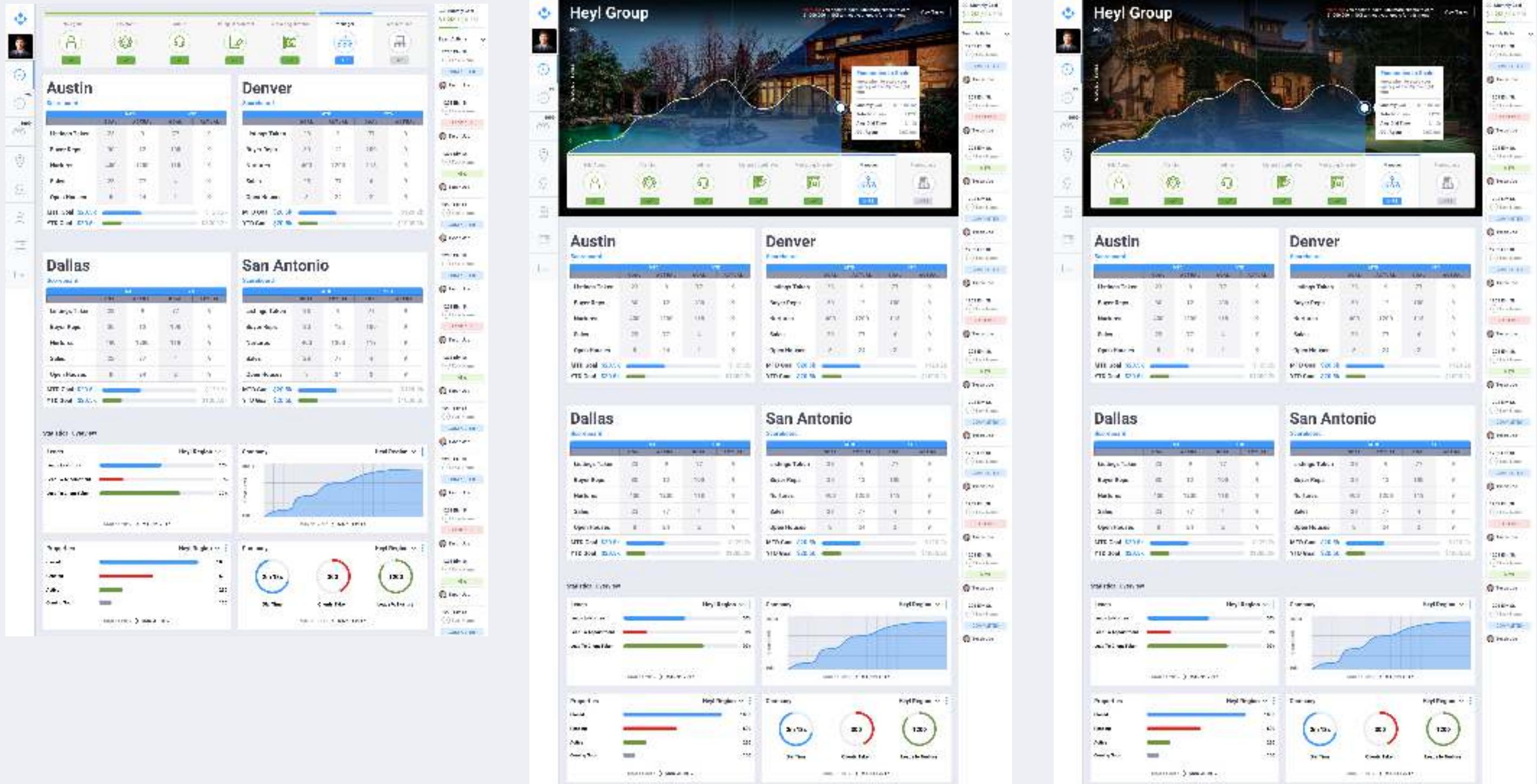
Ultimate Agency Dashboard for Owners



Know When To Grow and Hire



A Dashboard That Reflects Your Growing Agency



Set Goals For Your Team

The screenshot displays a user interface for a real estate management system. On the left, a vertical sidebar lists various menu items: Rules, Account, Call Scripts, Goals, and Sign Out. The main area features a large, scenic background image of a residential neighborhood at dusk. A prominent white line graph overlays the image, showing a path from the bottom left towards the top right, with several green circular markers along the way. In the top right corner of the main area, a red warning message reads: "Warning: You need to 'take' 500 more clients to earn \$1,000,000 in GCI to meet your goals for this month." To the right of the graph, a sidebar titled "Economies to Scale" provides key performance metrics: Monthly GCI (\$1.5 million), Total Nurtures (11230), Avg. Dial Time (2m 2s), and GCI/Agent (\$250,000). Below these metrics is a "HIRE" button. At the bottom of the main area, there is a "Scoreboard" section for the city of Denver, which includes a table comparing MTD and YTD goals and actuals for "Listings Taken".

Economies to Scale

Know when to scale your agency at exactly the right time.

| Monthly GCI | \$1.5 million |
|----------------|---------------|
| Total Nurtures | 11230 |
| Avg. Dial Time | 2m 2s |
| GCI/Agent | \$250,000 |

Denver

Scoreboard

| | MTD | YTD | | |
|----------------|------|--------|------|--------|
| | GOAL | ACTUAL | GOAL | ACTUAL |
| Listings Taken | 23 | 9 | 77 | 9 |

Set Goals For Your Teams in Different Metros

The screenshot shows a software interface for setting goals for real estate teams across various metropolitan areas. On the left, a sidebar lists icons for different categories: a blue square with a white 'M', a portrait of a man, a clock, a checkmark, a group of people, a location pin, a ribbon, a clipboard, a grid, and a right-pointing arrow.

The main area is titled "Goals" and displays the following information:

- AUSTIN:** Dial-Time: 30. Description: For each agent set the # of contacts they need to keep on a regular basis to ensure your team is running efficiently.
- DALLAS:** Dial-Time: 20. Description: For each agent set the # of contacts they need to keep on a regular basis to ensure your team is running efficiently.
- DENVER:** Dial-Time: 30. Description: For each agent set the # of contacts they need to keep on a regular basis to ensure your team is running efficiently.
- SAN ANTONIO:** Dial-Time: 30. Description: For each agent set the # of contacts they need to keep on a regular basis to ensure your team is running efficiently.

Contacts Per Hour: A slider bar indicates 20 contacts per hour, with a "1 MIN" label at the start.

Nurture Criteria: A section describing how agents change lead status from new to nurture. It includes a button to "Add a Nurture Criteria".

Lead Questions: A list of four questions for nurturing leads:

1. What has you thinking about a move?
2. When do you see yourself being ready to make the move?
3. I'm assuming you're not already committed to another realtor, correct?
4. When would be the best time to followup?

Followup Note: A note at the bottom states: "I want to go ahead and send you my contact info so you can reach out".

Review Agent Performance & Progress

Team

| | Tyson Joe | Don Miles | Troy Bowman | Marvin Zimmerman | Randall Fernandez | Sadie Roy |
|----------|-----------|-----------|-------------|------------------|-------------------|-----------|
| TASKS | 32 | 32 | 32 | 32 | 32 | 32 |
| NURTURES | 200 | 200 | 200 | 200 | 200 | 200 |
| GCI YTD | \$900,000 | \$900,000 | \$900,000 | \$900,000 | \$900,000 | \$900,000 |

| | Fannie Lambert | Alvin Harrington | Essie Wilson | Sylvia Chambers | Blanche Reese | Sylvia Barton |
|----------|----------------|------------------|--------------|-----------------|---------------|---------------|
| TASKS | 32 | 32 | 32 | 32 | 32 | 32 |
| NURTURES | 200 | 200 | 200 | 200 | 200 | 200 |
| GCI YTD | \$900,000 | \$900,000 | \$900,000 | \$900,000 | \$900,000 | \$900,000 |

| | Ian Perry | Elijah Harner | Lewis Knight | Gene Wells | Isabelle Allen | Ernest Fuller |
|----------|-----------|---------------|--------------|------------|----------------|---------------|
| TASKS | 32 | 32 | 32 | 32 | 32 | 32 |
| NURTURES | 200 | 200 | 200 | 200 | 200 | 200 |
| GCI YTD | \$900,000 | \$900,000 | \$900,000 | \$900,000 | \$900,000 | \$900,000 |

Find an Agent

Filter

Team Activity

- 1203 Elm St. Task Name COMPLETED Tyson Joe
- 1203 Elm St. Task Name PAST DUE Tyson Joe
- 1203 Elm St. Task Name NEW Tyson Joe
- 1203 Elm St. Task Name COMPLETED Tyson Joe
- 1203 Elm St. Task Name COMPLETED Tyson Joe

Review Agent Performance & Progress

Team

| | | |
|--|--|--|
| | | |
| | | |
| | | |

Tyson Joe

| | MTD | YTD | |
|----------------|------|--------|------|
| | GOAL | ACTUAL | GOAL |
| Listings Taken | 23 | 9 | 77 |
| Buyer Reps | 30 | 12 | 100 |
| Nurtures | 400 | 1200 | 118 |
| Sales | 23 | 77 | 4 |
| Open Houses | 8 | 24 | 2 |

MTD Goal \$20.5k

YTD Goal \$20.5k

GCI Average

Leads

| | |
|--|-----------------------|
| | \$20,500 NURTURES |
| | 5 MIN AVG CALL TIME |
| | 15 DAYS AVERAGE CLOSE |

Custom Call Scripts

The screenshot shows a CRM application interface. On the left, a vertical sidebar lists various features with corresponding icons: Rules (blue diamond), Account (person), Call Scripts (phone), Goals (flag), Sign Out (exit arrow), and a search bar labeled "Find an Agent". Below these are numerical values: 20, 1000, and 32. The main area is a grid of agent profiles, each consisting of a circular photo, a name, and three performance metrics: Tasks, Nurtures, and GCI YTD. The names of the agents are: Don Miles, Troy Bowman, Marvin Zimmerman, Randall Fernandez, Sadie, Alvin Harrington, Essie Wilson, Sylvia Chambers, Blanche Reese, Sylvia B., Elijah Harper, Lewis Knight, Gene Wells, Isabelle Allen, and Ernest. All agents have 32 Tasks, 200 Nurtures, and a GCI YTD of \$900,000.

| Agent | Tasks | Nurtures | GCI YTD |
|-------------------|-------|----------|-----------|
| Don Miles | 32 | 200 | \$900,000 |
| Troy Bowman | 32 | 200 | \$900,000 |
| Marvin Zimmerman | 32 | 200 | \$900,000 |
| Randall Fernandez | 32 | 200 | \$900,000 |
| Sadie | 32 | 200 | \$900,000 |
| Alvin Harrington | 32 | 200 | \$900,000 |
| Essie Wilson | 32 | 200 | \$900,000 |
| Sylvia Chambers | 32 | 200 | \$900,000 |
| Blanche Reese | 32 | 200 | \$900,000 |
| Sylvia B. | 32 | 200 | \$900,000 |
| Elijah Harper | 32 | 200 | \$900,000 |
| Lewis Knight | 32 | 200 | \$900,000 |
| Gene Wells | 32 | 200 | \$900,000 |
| Isabelle Allen | 32 | 200 | \$900,000 |
| Ernest | 32 | 200 | \$900,000 |

Custom Call Scripts

Call Scripts

Initial Touchpoint

WHEN: Sales Changes to Retain
SUCCESS RATE: 100%

I want to talk about things that are quite important to me. There are love and one my personal inadequacies. The thing is that I'm quite fond of love. I like that it's a pretty all-right deal. However, I'm going to have to admit that my emotional baggage has built up walls that not even a shock and awe campaign could bring down. But I do love. And in fact I even love unconditionally.

1) Record everything

Always write down all details of every phone call. Write down any names and titles you learn. Not just the name of the person you're trying to contact. The contact info's name can be vital to remember as they're often gatekeepers. Write down when you called and when you said you'd call back. 2) Use a database or spreadsheet to record everything

You'll never manage by hand, and Excel spreadsheets aren't user friendly in the long run. If you're prepared to invest in a new CRM (Customer Relationship Management) tool, that's a great idea. If not, you, there is a cheaper alternative. I created my own database using Microsoft Access. Visit <http://www.dreamweaverid.com/laada/poctracts>.

Back to Hopper

WHEN: Sales Changes to New Lead
SUCCESS RATE: 34%

Cold calling can be a great way to generate quality leads. You get to speak to the gatekeepers and stakeholders, and you get a great insight into their requirements and interests. But cold calling is an art-form. It can be daunting, it's always a bit of work, and you always need to make a good impression. So you need to do it right. Following are some tips which will help you do just that.

1) Record everything

Always write down all details of every phone call. Write down any names and titles you learn. Not just the name of the person you're trying to contact. The contact info's name can be vital to remember as they're often gatekeepers. Write down when you called and when you said you'd call back. 2) Use a database or spreadsheet to record everything

You'll never manage by hand, and Excel spreadsheets aren't user friendly in the long run. If you're prepared to invest in a new CRM (Customer Relationship Management) tool, that's a great idea. If not, you, there is a cheaper alternative. I created my own database using Microsoft Access. Visit <http://www.dreamweaverid.com/laada/poctracts>.

3rd Touchpoint

WHEN: Sales Changes to Retain
SUCCESS RATE: 30%

Maybe you've heard I marketing terms, maybe. Either way, let me tell you, there is a difference between it's about love at those market successfully. They are may be your accomplishing at the business.

Unique Selling Proposition

A unique selling prop referred to as a USP, is unique and valuable because product or service must be unique and distinctive.

It may be an inherent product or service of widget available and your ideal customer something you created for my business, 10s

Call Scripts

Initial Touchpoint

WHEN: Sales Changes to Retain
SUCCESS RATE: 100%

I want to talk about things that are quite important to me. There are love and one my personal inadequacies. The thing is that I'm quite fond of love. I like that it's a pretty all-right deal. However, I'm going to have to admit that my emotional baggage has built up walls that not even a shock and awe campaign could bring down. But I do love. And in fact I even love unconditionally.

1) Record everything

Always write down the name of the contact, tools they're often called, and database o

2) Never spreader you prep Relationship if not, you'll my own da http://www

Initial Touchpoint

B F H G E % M * D X

I want to talk about things that are quite important to me. There are love and one my personal inadequacies. The thing is that I'm quite fond of love. I like that it's a pretty all-right deal. However, I'm going to have to admit that my emotional baggage has built up walls that not even a shock and awe campaign could bring down. But I do love. And in fact I even love unconditionally.

I have a truck. It's kind of a small truck, but I'm comfortable with myself on there okay. I think that I love it. I had a friend about a year ago ask me if I could have any car in the world what would I have. And aside from pointing out that my friend and I have clearly run out of things to discuss and should probably go our separate ways, my answer told me that I love my truck (obviously I said I would keep my truck). The thing is that it's pretty old, almost 10 years. And it seems to attract trouble, it was broken into twice, keyed once and beat with an umbrella by my nephew once. It has no stereo and kind of smells, but when it comes down to it, I just love that thing.

I take my truck, now, old, fat, skinny, beat up or shiny. But, I simply couldn't take it with truck side advertising. Even if someone offered me money, which would mean that my truck would start giving back a little, as opposed to sucking the money out me like a leach as it has been. I simply couldn't handle it. My truck is an individual that puts a smile on my face almost whenever I see it. Truck side advertising would simplyaint the one thing in my life that hasn't been tarnished by the personal inadequacies (that's actually not entirely true, I can feel myself becoming fond of this dog named I like near my work).

Buy

Next Steps



- Feedback by end of the week (5/26)
- Final Production Sprint and Revisions by (5/31)
- Final Style Guide for Development (6/2)