# High-Level Wireframes

Prepared by Bryce Thompson

# Agenda

- **Objective**
- **Project Timeline**
- **What We Learned**
  - Interview: John
  - Presentation Review: Tim Heyl
  - Interview: Amy
- **User stories and User flows**
- **White boarding**
- **Wireframe Presentation**
- **Next Steps**

# Objective

**Today we want to be able to confirm that we have effectively translated our user stories gathered from last week's on-site interviews into user flows and subsequently wireframes.**

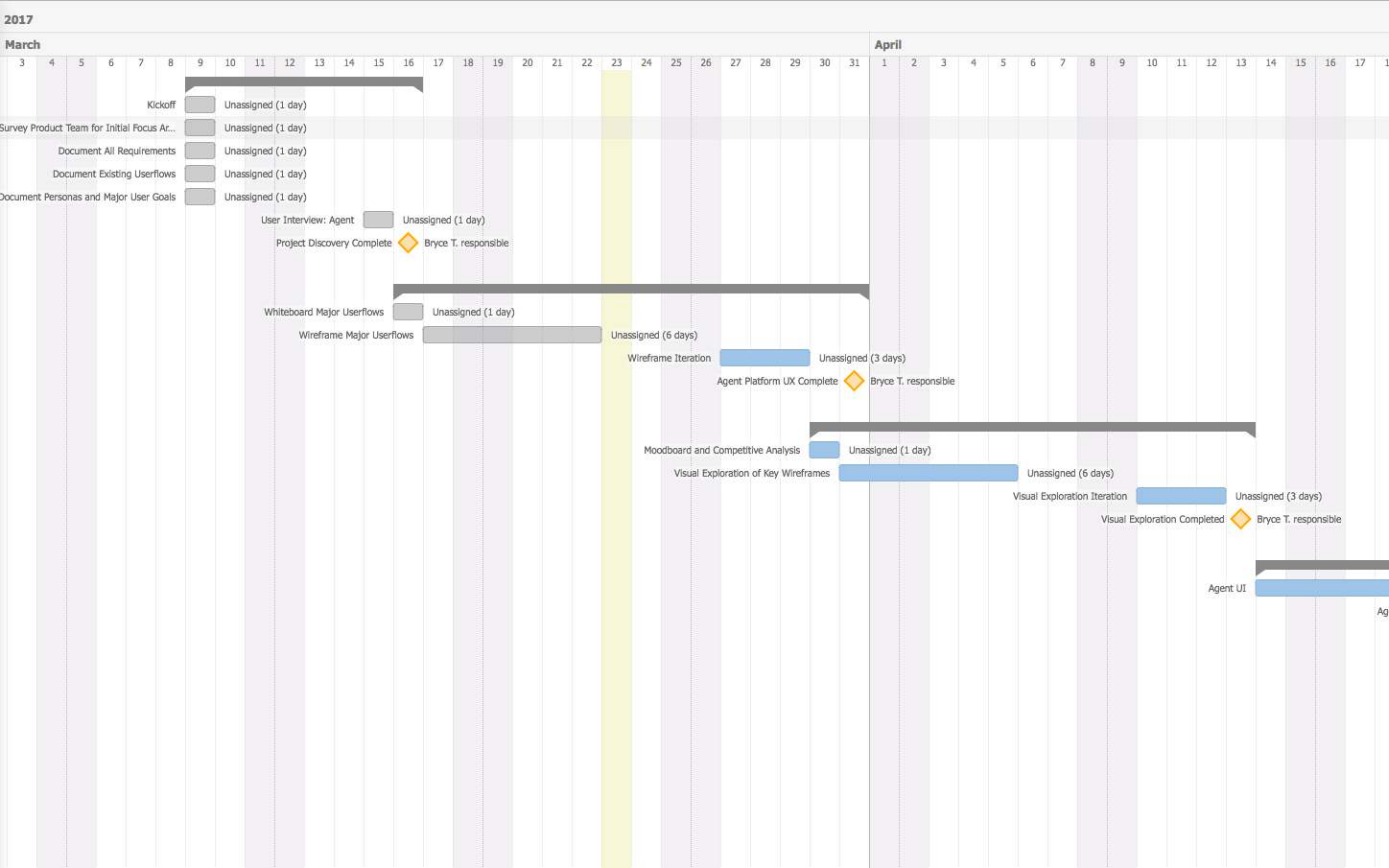
**Additionally, we also want to identify the role of the agency owner and how they need to interact with the platform based on Tim Heyl's Real Estate Machine presentation.**

# Objective

**Moreover, for product owners reviewing this presentation and materials, we need to identify that the step-by-step (AKA flow) is accurate for these user stories, and then determine what details are missing from those flows.**

**If there are more important user scenarios that I missed, lets talk about it! However it’s important to get these 9 flows into a good state before moving onto other user scenarios.**

# Project Timeline


2017
March
April
3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31
1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17
Kickoff
Unassigned (1 day)
Survey Product Team for Initial Focus Ar...
Unassigned (1 day)
Document All Requirements
Unassigned (1 day)
Document Existing Userflows
Unassigned (1 day)
Document Personas and Major User Goals
Unassigned (1 day)
User Interview: Agent
Unassigned (1 day)
Project Discovery Complete
Bryce T. responsible
Whiteboard Major Userflows
Unassigned (1 day)
Wireframe Major Userflows
Unassigned (6 days)
Wireframe Iteration
Unassigned (3 days)
Agent Platform UX Complete
Bryce T. responsible
Moodboard and Competitive Analysis
Unassigned (1 day)
Visual Exploration of Key Wireframes
Unassigned (6 days)
Visual Exploration Iteration
Unassigned (3 days)
Visual Exploration Completed
Bryce T. responsible
Agent UI

# What We Learned

**Persona A:**
John Schults

**Role**
Seller Agent

## Day-to-Day

**Morning (Office)**
- Script Prep
- Office
- Pulls leads from Trello (Effectively the Hopper)
- Leads are gathered and tracked through Boomtown which is currently not integrated into either Trello(Task Management) nor Mojo(Calling).
- A virtual assistant bridges the gap between these applications
- @8am opens Mojo and selects group of leads to call over and over
- @11am standup meeting with team

**Mid-Day (Offsite)**
- If dealing with a seller, go on-site to the property
- Relays the required documents to seller for transaction
- If  dealing with buyer, usually meets at the Heyl Group offices

**Afternoon (Office)**
- Closing deals
- Following up with nurtures
- Biggest Challenges
- Protocol is spread across 4 platforms including a variety of Virtual Assistants to keep it humming.
- Don’t necessarily know if a note on a lead is accurate so you may call a lead and it’s not a good time at all to be calling.
- It’s hard to manage 100s and 100s of leads with most of the software out there

**Persona A:**
John Schults

**Role**
Seller Agent

**Goals**

- Developing strong, but also numerous relationships with potential buyers/sellers referred to as nurtures.

- Nurtures are leads that are not a simple yes/no, and may require longer term follow up in order to close the sale or escalate the lead.

- Information gathering process needs to be easy
- The more you nurture a lead over time, the more there is a likelihood of reward

- 6th phone call to a nurture results in 90% conversion

- 22 touchpoints is typically necessary for conversion and much of it is the nurturing of a lead over extended periods of time.

- Attaching as much relevant information about a lead so that it can be picked up by other agents if necessary without making mistakes.

**Persona A:**
John Schults

**Role**
Seller Agent

**Defining Success**

- Maintain a feeling of autonomy and self-accountability as an agent

- I.e. - Going from buyer agent to seller agent and owning that process over the course of your time as an agent.

- Increase likelihood of a sale and spending the exact right amount of time converting a lead into a nurture into an appointment into a active listing.

- Being able to have all their tools on one platform

**Common Scenarios**

- I need to go through my 105 leads this morning (My One Thing), and check to see if there are any upcoming nurtures, and pick a group of attractive leads to dial. If there are new leads that look really good, I might put a lead I have back in the hopper.

- After talking to a seller lead, we agree to meet about potentially listing the property with Heyl and I have to have all the required documents to sign the seller and escalate the appointment to active.

- When I get back to the office, I check to see if there any tasks generated from admin, and if not, I'm going to continue following up with my contacts and checking in on any nurtures that need a followup or appointments that are ready to turn into active listings. If so, admin takes over and ensures documentation is fulfilled and acts as main contact for the remainder of the selling process.

**Persona B:**
Amy Goldberg

**Role**
Accounts Administrator

**Day-to-Day**

- Reviews Virtual Assistant activity having to do with reports or completed to-dos.
- Once a seller has been changed to active, we auto-generate a # of tasks to be completed ranging from MLS profile creation to documents gathering.
- Delegating those tasks to a custom list of recipients and executing them
- Later in the day I'll followup with sellers if we need further documentation and will status update them if necessary.
- If we have a buyer, ________________.

**Persona B:**
Amy Goldberg

**Role**
Accounts Administrator

**Biggest Challenges**

- Scaling our operations to multiple cities
- Tasks in high volume are hard to manage
- Organizing 50 properties or more at any given time with their own sets of status changes and associated task generation.
- If goes to pending, do X,Y, & Z
- If goes to  closed, do X,Y, & Z
- If trashed, do X,Y, & Z
- Bonus: If raving fan, do X,Y, & Z

**Goals**

- Clear out task list everyday by delegation and curation
- Ensure seller satisfaction by routinely following up with them when status has changed.
- Understand from both a macro(multiple metros) and micro level (Individual listing) the changes in status and task completion via reporting.

**Persona B:**
Amy Goldberg

**Role**
Accounts Administrator

**Defining Success**

- Not having to use multiple platforms to fulfill role
- Reducing tasks EOD to zero
- Ensure new listings are completed and have all the necessary documentation

**Common Scenarios**

- I created a templated list of tasks for a new listing and auto-assigned a mix of Virtual Assistants and other staff whenever a new listing is changed to active. I have the option to create some other tasks associated with different status changes, but that's all I need for now.

- Agent just went out on an appointment with a seller, and the listing showed up in my queue as an active listing. I click on the listing in my feed and confirm the property by reviewing the missing transaction details. Tasks are auto-generated once I've selected "save" and "confirm tasks". If I need to add a custom task, or assign it to new agent I can do that with ease.

- At the end of the day, I need to be able to gather a report on what properties are almost closed as well as a pulse on the productivity taking place amongst my team.

- I see a property enter my activity feed that says I should followup with the lead since I set a reminder 30-days ago to inform them of status. I'm going to call the lead and mark down any changes.

**Persona C:**
Tim Heyl

**Role**
Agency Owner, Entrepreneur

**Day-to-Day**

- Morning routine revolves around the “One Thing” which is described as the most valuable usage of focus time early on in the morning for approximately 2-3 hours. This “One Thing” should grow the business and is non-negotiable.

- Finding ways to scale the business and identifying any bottlenecks in production.

- Depending on Level 1-7 in MREA(Million Dollar Real Estate Agent), could be focusing on lead generation or focusing on recruiting team leaders who will recruit mega rockstar agents.

**Persona C:**
Tim Heyl

**Role**
Agency Owner, Entrepreneur

- **The Hopper**
- The Hopper mitigates the risk of leads going untouched due to a bottleneck in production.

- For example, if one person is holding onto all their leads and not acting on some of them out of lack of bandwidth, that's not good for business especially when anything but a trashed lead is valuable. Therefore, rules are in place that put leads back into the hopper given certain time and status change conditions.

- Within the Hopper system is a series of status changes associated with time intervals informing the agents when to followup with a lead.

- **So if they are a qualified lead, an agent may do 21 Days of Gain:**
  - Day 1: Call, text, email then 4 add-on calls.
  - Day 2: Voicemail
  - Day 4: Email and call
  - Days 5-21: Continue to call, text, and email

- **The lists of leads in the hopper are categorized into:**
  - Qualify Seller
  - Qualify Buyer
  - Seller Nurture Past Due
  - Buyer Nurture Past Due
  - Seller Nurture Due Today
  - Buy Nurture Due Today
  - Agents 100 Active Leads Pipeline

- **Rules of the Leads Nurture -> Hot Pipeline**
  - Only 100 nurtures allowed
  - Anytime a lead is moved to nurture or trash, it needs a well-written reason.
  - Leads should always be determined to be "nurture" or "hot" under 12 hours upon arrival.
  - No past due todos or agent loses the lead and it goes back into the hopper.

**Persona C:**
Tim Heyl

**Role**
Agency Owner, Entrepreneur

**Biggest Challenges**

- How do we know when to grow from four-lanes to twenty-lanes
- How can we visualize the pathway to market center
- Ensuring that my agents and admins are trained to meet the demands of the system. They need to know the rules that make this all successful and we need to hold them accountable with customers and meeting performance goals.
- Identifying overloaded points in production and creating protocol to supplement
- Lots more! These are the biggest.

**Persona C:**
Tim Heyl

**Role**
Agency Owner, Entrepreneur

**Goals**

- Being able to not have to train my employees and grow at-will
- Being able to know when to hire/fire
- Being able to set the rules of engagement and make changes along the way.
- Being able to see a high-level view of my organization and see how are metrics are scaling, and what needs work in order to get to level 2 and beyond.

**Persona C:**
Tim Heyl

**Role**
Agency Owner, Entrepreneur

**Defining Success**

- Automate processes stemming from disparate platforms including virtual assistants wherever necessary.
- Track my organization’s progress from Level 1 to Level 7 of MREA
- Be able to customize the platform to my business's needs as we grow or discover new things about our customers and market.

**Persona C:**
Tim Heyl

**Role**
Agency Owner, Entrepreneur

**Common Scenarios**

- **Level 1:** Getting consistent results from myself and the rest of my team is important so I'm going to want to create custom nurture criteria and set goals for dial time and contacts/per hour. I want my team to hit these goals too and know who's slacking. When other agents are going through re-inserted nurtures we should know key points of information such as:
  - 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?

- **Level 3:** I want to review individual agent reports on productivity, nurtures, etc and be able to relate that to other agents as well so creating custom scripts for qualitative feedback is important and ensuring past clients are happy in addition to growing our nurtures aggressively.

- **Level 6:** I want to be able to get reports on multiple city performance as well as highlight individual achievement with a scoreboard and prizes.

# User Stories to Flows

**Persona A:**
John Schults

**Role**
Seller Agent

| Story | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | 13 | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | Arrive at Dashboard | View Leads | Visit Hopper for New Leads to be utilized | Select "Qualify Seller" List | Review a Lead's Details | Add Lead to Sphere/Nurture Pipeline | Error "You have too many nurtures" | View Pipeline | Change status of old nurture to past due | Back to Hopper | Add Lead to Sphere/Nurture Pipeline | Select any # of New Leads | Initiate Dialer on New Qualified Lead | Call Begins | Determine if nurture or hot | Next Call |
| | Requirements | Requirements | Requirements | Requirements | Requirements | Requirements | Requirements | Requirements | Requirements | Requirements | Requirements | Requirements | Requirements | Requirements | Requirements | Requirements |
| I need to go through my 105 leads this morning (My One Thing), and check to see if there are any upcoming nurtures, and pick a group of attractive leads to dial. If there are new leads that look really good, I might put a lead I have back in the hopper. | | | Show different lists of leads | | | | | | | | | Should be sorted by most active followed by nurtures | | Screen should show nurture qualifications - 5 steps | | |
| | Touchpoint | Touchpoint | Touchpoint | Touchpoint | Touchpoint | Touchpoint | Touchpoint | Touchpoint | Touchpoint | Touchpoint | Touchpoint | Touchpoint | Touchpoint | Touchpoint | Touchpoint | Touchpoint |
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| | Challenges | Challenges | Challenges | Challenges | Challenges | Challenges | Challenges | Challenges | Challenges | Challenges | Challenges | Challenges | Challenges | Challenges | Challenges | Challenges |
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| | Experience | Experience | Experience | Experience | Experience | Experience | Experience | Experience | Experience | Experience | Experience | Experience | Experience | Experience | Experience | Experience |

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| | Arrive at Dashboard | Review New Tasks | Review Task Detail | Complete Task | Visit Leads | View Sphere/Nurture Pipeline | Select a batch of expiring nurtures | Initialize Dialer | Call Begins | Determine if should remain nurture or put back into hopper | Add a Note | Set New Followup Schedule | After Nurtures are touched to 100%, positive feedback for a job well done |
| | Requirements | Requirements | Requirements | Requirements | Requirements | Requirements | Requirements | Requirements | Requirements | Requirements | Requirements | Requirements | Requirements |
| When I get back to the office, I check to see if there any tasks generated from admin, and if not, I'm going to continue following up with my contacts and checking in on any nurtures that need a followup or appointments that are ready to turn into active listings. If so, admin takes over and ensures documentation is fulfilled and acts as main contact for the remainder of the selling process. | | | | | | | | | If it's a past client, show script | | | | |
| | Touchpoint | Touchpoint | Touchpoint | Touchpoint | Touchpoint | Touchpoint | Touchpoint | Touchpoint | Touchpoint | Touchpoint | Touchpoint | Touchpoint | Touchpoint |
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|---|---|---|---|---|---|---|---|
| | Open Mobile App | Review Upcoming Appointments | Select Appointment | Review Listing Details | View Missing Transaction Documentation | If Seller is ready, obtain a signature for any timely docs | Change Status of Lead inside of the appointment to active or nurture |
| | Requirements | Requirements | Requirements | Requirements | Requirements | Requirements | Requirements |
| After talking to a seller lead, we agree to meet about potentially listing the property with Heyl and I have to have all the required documents to sign the seller and escalate the appointment to active. | | Needs to be able to view activity, and if any leads have changed status so that they can followup if it's an emergency | | Needs as much pertinent information to the seller as possible | | | |
| | Touchpoint | Touchpoint | Touchpoint | Touchpoint | Touchpoint | Touchpoint | Touchpoint |
| | Mobile | Mobile | Mobile | Mobile | Mobile | Mobile | Mobile |
| | Challenges | Challenges | Challenges | Challenges | Challenges | Challenges | Challenges |
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| | Experience | Experience | Experience | Experience | Experience | Experience | Experience |

**Persona B:**
Amy Goldberg

**Role**
Accounts Administrator

**I created a templated list of tasks for a new listing and auto-assigned a mix of Virtual Assistants and other staff whenever a new listing is changed to active. I have the option to create some other tasks associated with different status changes, but that's all I need for now.**

| Arrive at Dashboard | Go to Rules under settings | Select To-Dos | Select Listings under to-dos | View List of To-Dos Associated with Autogen Active Listings | Select a To-Do | Remove assignee | Add new assignee | Save | Back to Dashboard |
|---|---|---|---|---|---|---|---|---|---|
| **Requirements** | **Requirements** | **Requirements** | **Requirements** | **Requirements** | **Requirements** | **Requirements** | **Requirements** | **Requirements** | **Requirements** |
| | | | | You should be able to see a list of active, pending, etc and to-do rules for each | | | | | |
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| **Experience** | **Experience** | **Experience** | **Experience** | **Experience** | **Experience** | **Experience** | **Experience** | **Experience** | **Experience** |
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**Agent just went out on an appointment with a seller, and the listing showed up in my queue as an active listing. I click on the listing in my feed and confirm the property by reviewing the missing transaction details. Tasks are auto-generated once I've selected "save" and "confirm tasks". If I need to add a custom task, or assign it to new agent I can do that with ease.**

| Arrive at Dashboard | See list of to-be confirmed active listings | Selects Active Listing | View Listing Details | Review Transaction Details | Confirm missing documents | Reviews Associated Tasks | Adds a Custom Task | Assign to user | Save new task | Confirm autogeneration of tasks | To-Dos Generated | View To-Dos | Sort To-Dos by Listing |
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| **Requirements** | **Requirements** | **Requirements** | **Requirements** | **Requirements** | **Requirements** | **Requirements** | **Requirements** | **Requirements** | **Requirements** | **Requirements** | **Requirements** | **Requirements** | **Requirements** |
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| **Experience** | **Experience** | **Experience** | **Experience** | **Experience** | **Experience** | **Experience** | **Experience** | **Experience** | **Experience** | **Experience** | **Experience** | **Experience** | **Experience** |
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**Persona B:**
Amy Goldberg

**Role**
Accounts
Administrator

| I see a property enter my activity feed that says I should followup with the lead since I set a reminder 30-days ago to inform them of status. I'm going to call the lead and mark down any changes. | Arrive at Dashboard | Selects ToDo "Followup with XXXXXXX" | Views Listings | Calls Listing | Adds Note | Views Transaction Details | Uploads New Documents and Information | Selects Create Task |
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| | Requirements | Requirements | Requirements | Requirements | Requirements | Requirements | Requirements | Requirements |
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| | Challenges | Challenges | Challenges | Challenges | Challenges | Challenges | Challenges | Challenges |
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| | Experience | Experience | Experience | Experience | Experience | Experience | Experience | Experience |
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| At the end of the day, I need to be able to gather a report on what properties are almost closed as well as a pulse on the productivity taking place amongst my team. | Arrive at Dashboard | Change city to all cities | View report on productivity #s | See what properties are closing soon | Select a Listing of interest | Receive Call from seller | Add a Note | Selects Create Task | Inputs Task Name and Assigns to User | Save Task | Save Note |
|---|---|---|---|---|---|---|---|---|---|---|---|
| | Requirements | Requirements | Requirements | Requirements | Requirements | Requirements | Requirements | Requirements | Requirements | Requirements | Requirements |
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**Persona C:**
Tim Heyl

**Role**
Agency Owner, Entrepreneur

| | Arrive at Dashboard | Selects Settings | Selects Goals | Set contacts per/hour goal | Set dial time goal | Select Nurture Criteria | Adds Nurture Item | Removes Nurture Criteria Item | Set when and how often you get a report on that information | Save |
|---|---|---|---|---|---|---|---|---|---|---|
| **Level 1: Getting consistent results from myself and the rest of my team is important so I'm going to want to create custom nurture criteria and set goals for dial time and contacts/per hour. I want my team to hit these goals too and know who's slacking. When other agents are going through re-inserted nurtures we should know key points of information** | Requirements | Requirements | Requirements | Requirements | Requirements | Requirements | Requirements | Requirements | Requirements | Requirements |
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**Persona C:**
Tim Heyl

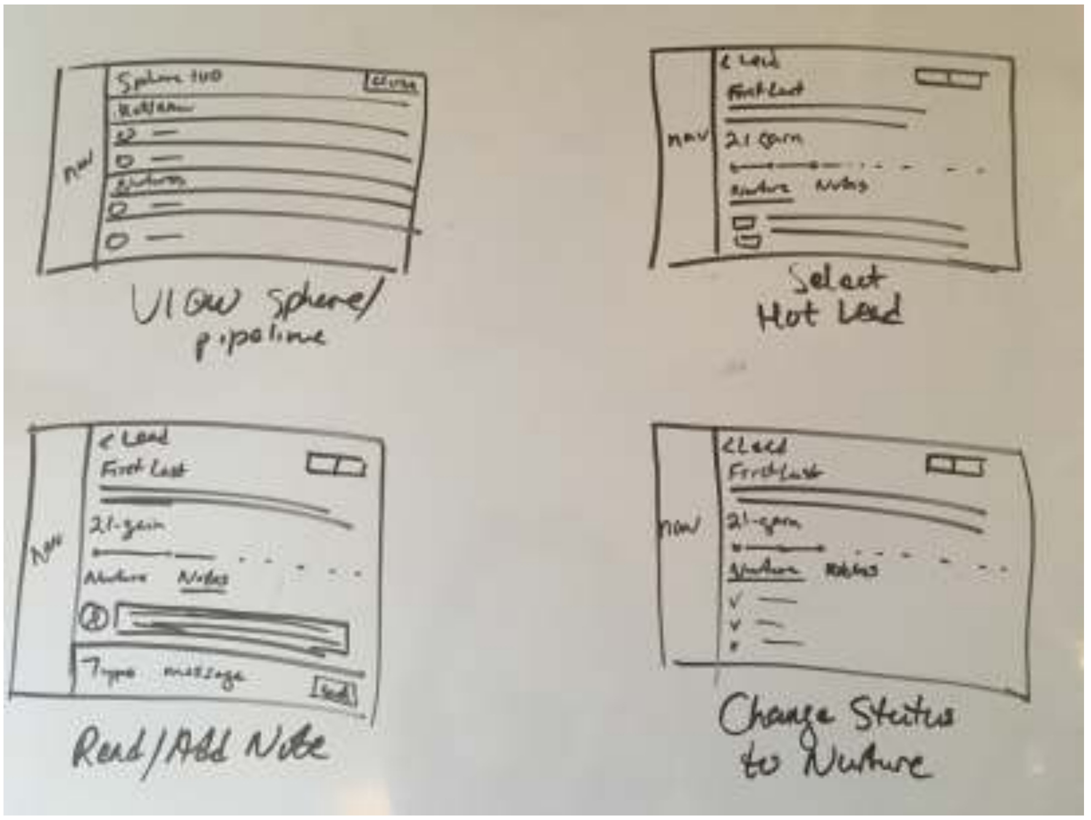
**Role**
Agency Owner, Entrepreneur

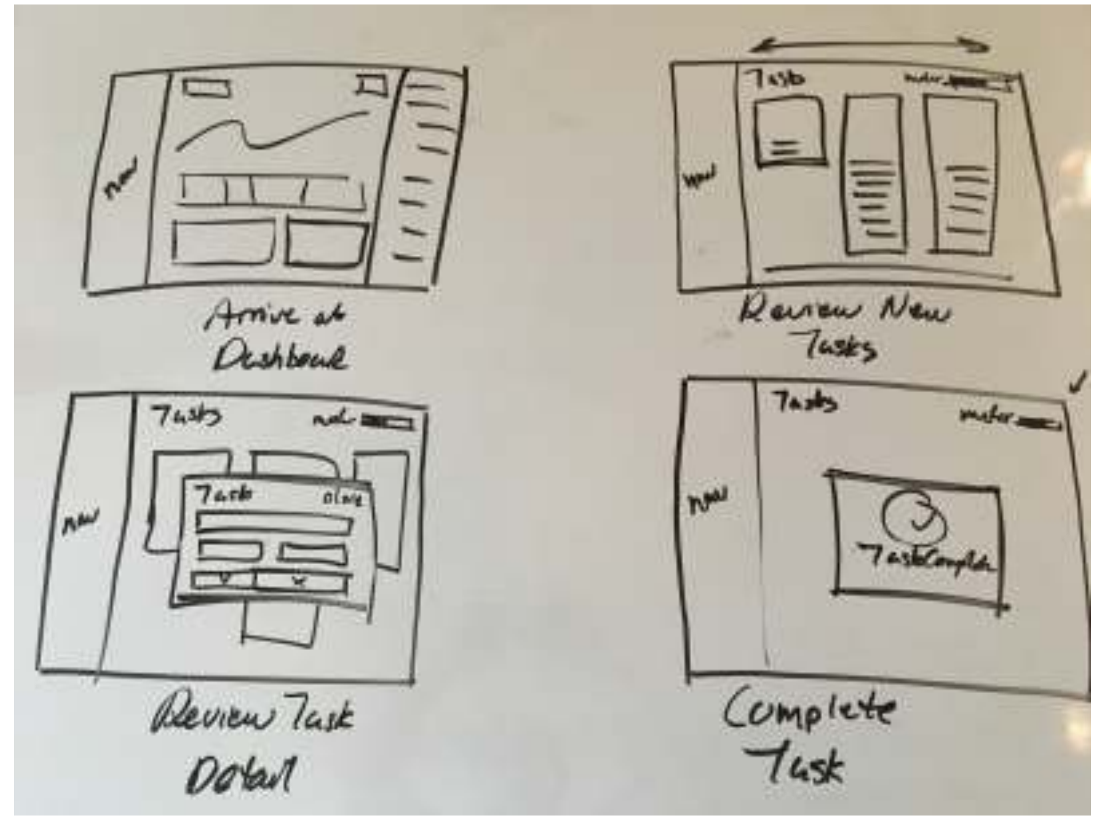
| | Arrive at Dashboard | Selects Settings | Selects Goals | Set contacts per/hour goal | Set dial time goal | Select Nurture Criteria | Adds Nurture Item | Removes Nurture Criteria Item | Set when and how often you get a report on that information | Save |
|---|---|---|---|---|---|---|---|---|---|---|
| **Level 1: Getting consistent results from myself and the rest of my team is important so I'm going to want to create custom nurture criteria and set goals for dial time and contacts/per hour. I want my team to hit these goals too and know who's slacking. When other agents are going through re-inserted nurtures we should know key points of information** | Requirements | Requirements | Requirements | Requirements | Requirements | Requirements | Requirements | Requirements | Requirements | Requirements |
| | Touchpoint | Touchpoint | Touchpoint | Touchpoint | Touchpoint | Touchpoint | Touchpoint | Touchpoint | Touchpoint | Touchpoint |
| | Challenges | Challenges | Challenges | Challenges | Challenges | Challenges | Challenges | Challenges | Challenges | Challenges |
| | Experience | Experience | Experience | Experience | Experience | Experience | Experience | Experience | Experience | Experience |

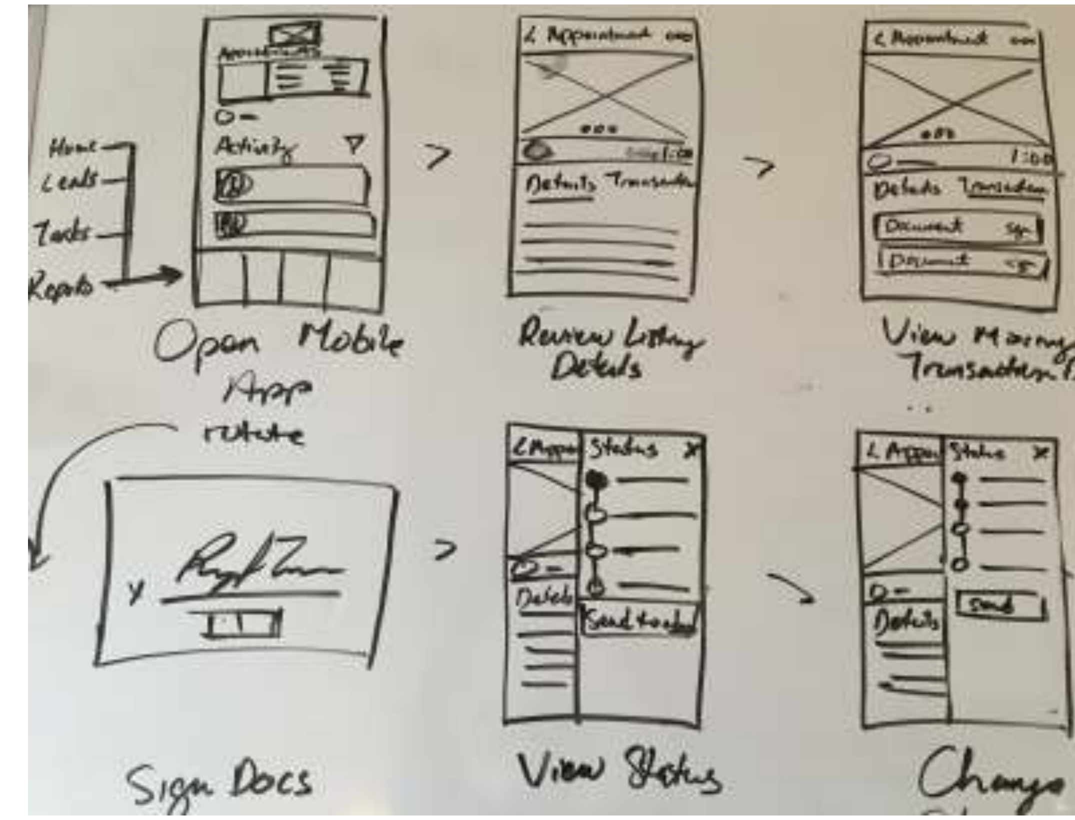
| | Arrive at Dashboard | See list of total nurtures | Selects Settings | Selects Call Scripts | View Call Scripts by Lead Status | Selects Post-Client | Add/Edit Script | Save | Return to Dashboard |
|---|---|---|---|---|---|---|---|---|---|
| **Level 3: I want to review individual agent reports on productivity, nurtures, etc and be able to relate that to other agents as well so creating custom scripts for qualitative feedback is important and ensuring past clients are happy in addition to growing our nurtures aggressively.** | Requirements | Requirements | Requirements | Requirements | Requirements | Requirements | Requirements | Requirements | Requirements |
| | Touchpoint | Touchpoint | Touchpoint | Touchpoint | Touchpoint | Touchpoint | Touchpoint | Touchpoint | Touchpoint |
| | Challenges | Challenges | Challenges | Challenges | Challenges | Challenges | Challenges | Challenges | Challenges |
| | Experience | Experience | Experience | Experience | Experience | Experience | Experience | Experience | Experience |

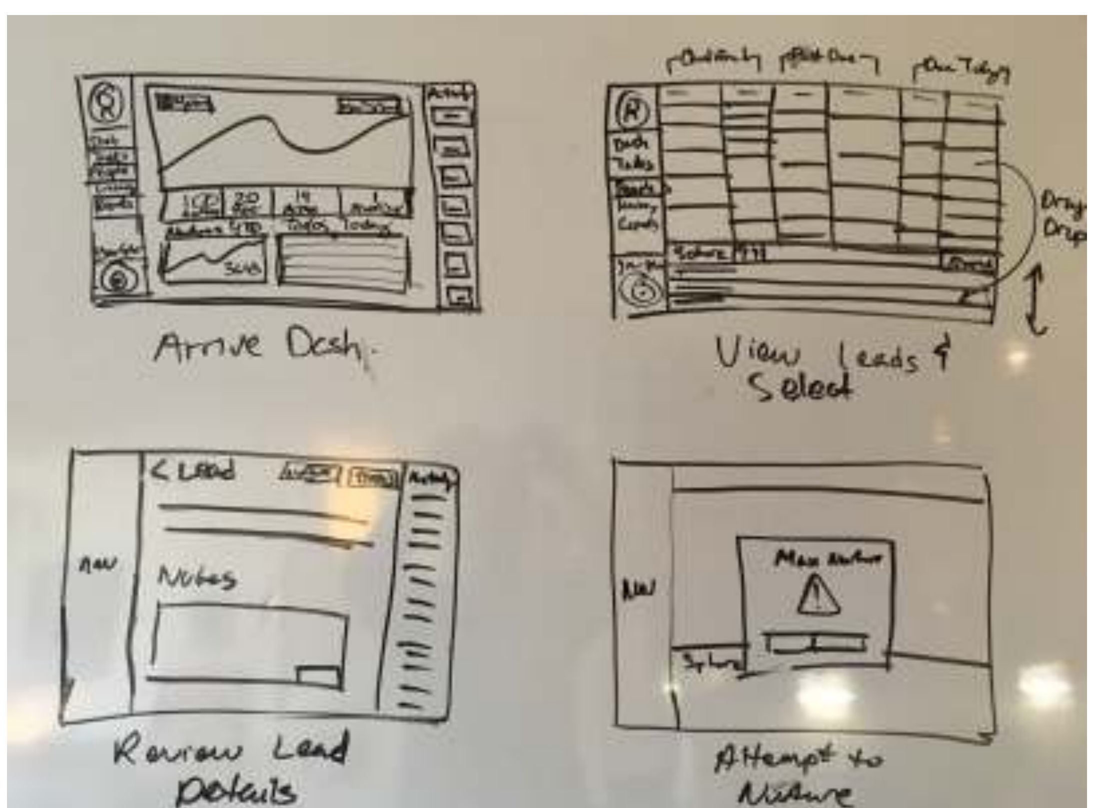
| | Arrive at Dashboard | Select all cities | See list of high performers | See scoreboard of all active metropolitans | Sees productivity pulse of admin | Selects Settings | Selects Cities | Selects Denver | Set # of ideal nurtures | Selects Add New City |
|---|---|---|---|---|---|---|---|---|---|---|
| **Level 6: I want to be able to get reports on multiple city performance as well as highlight individual achievement with a scoreboard and prizes.** | Requirements | Requirements | Requirements | Requirements | Requirements | Requirements | Requirements | Requirements | Requirements | Requirements |
| | Touchpoint | Touchpoint | Touchpoint | Touchpoint | Touchpoint | Touchpoint | Touchpoint | Touchpoint | Touchpoint | Touchpoint |
| | Challenges | Challenges | Challenges | Challenges | Challenges | Challenges | Challenges | Challenges | Challenges | Challenges |
| | Experience | Experience | Experience | Experience | Experience | Experience | Experience | Experience | Experience | Experience |

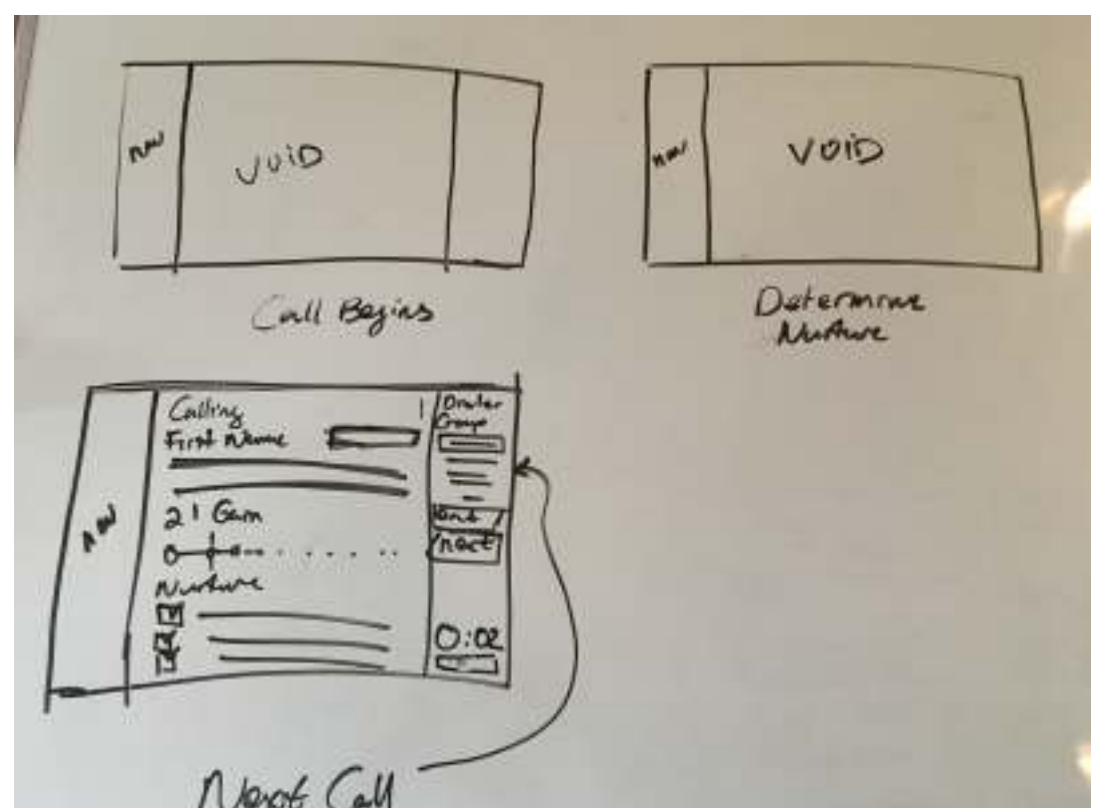
# Whiteboarding Flows

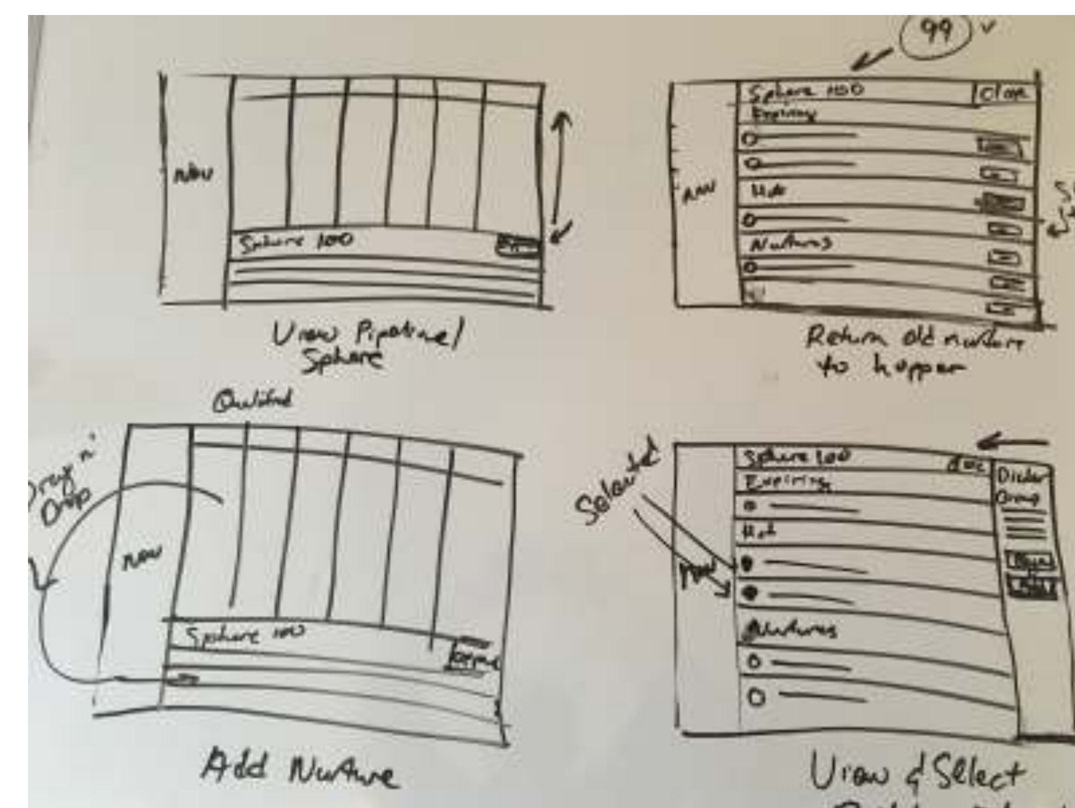

View sphere/ pipeline
Select Hot Lead
Read/Add Note
Change Status to Nurture

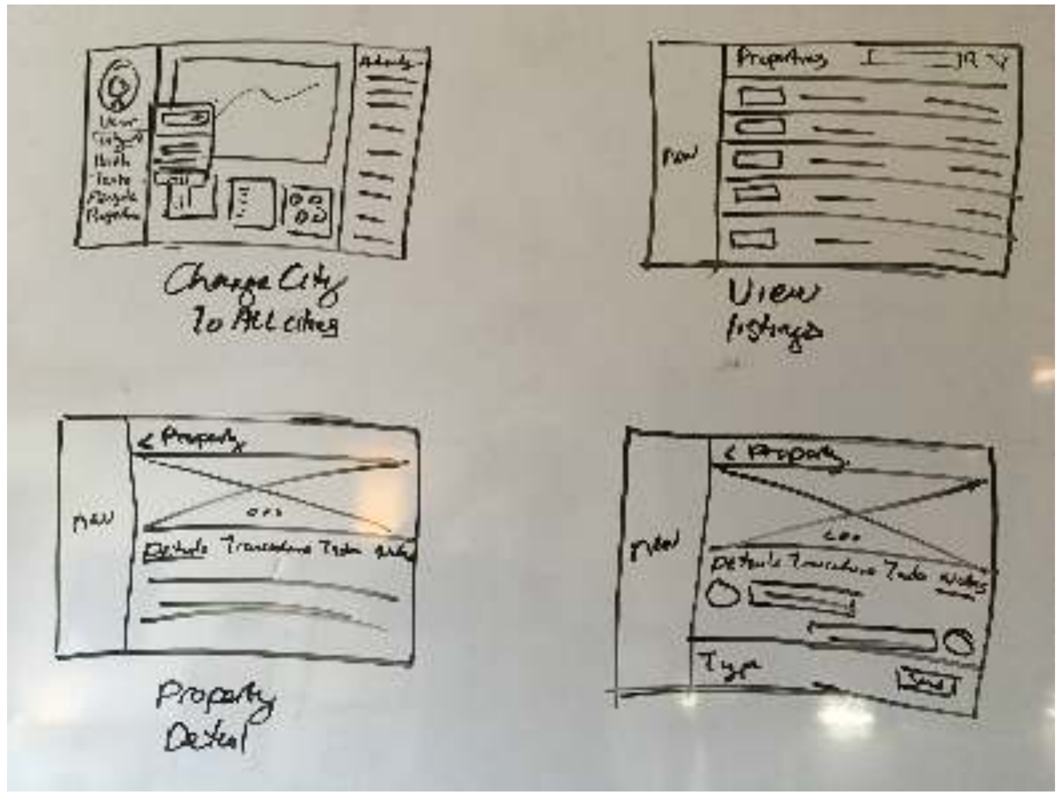

Arrive at Dashboard
Review New Tasks
Review Task Detail
Complete Task

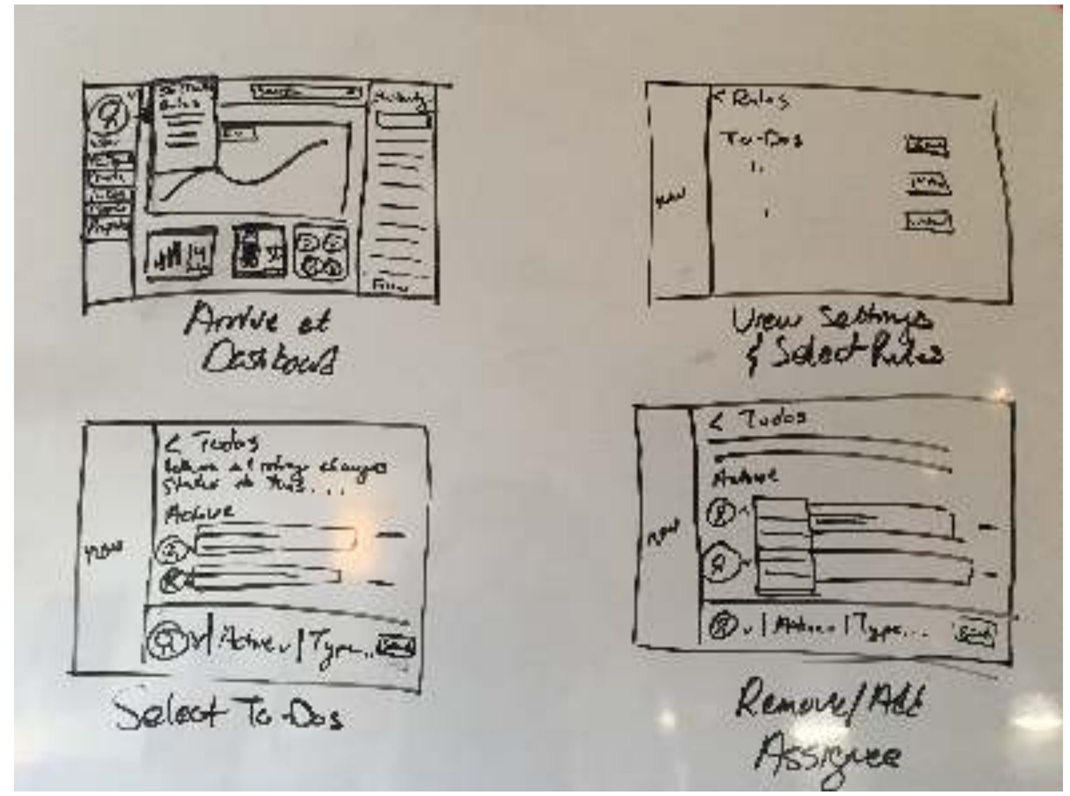

Open Mobile App
Review Listing Details
Sign Docs
View Status

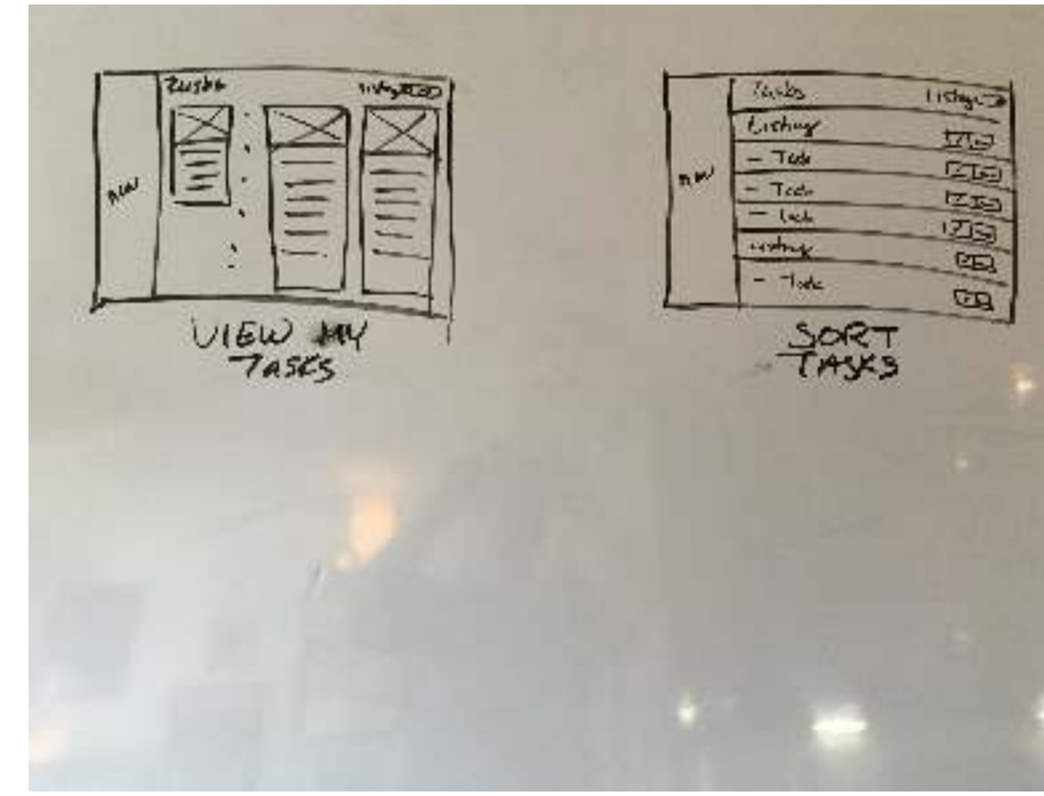

Arrive Dash
View leads & Select
Review Lead Details
Attempt to Nurture

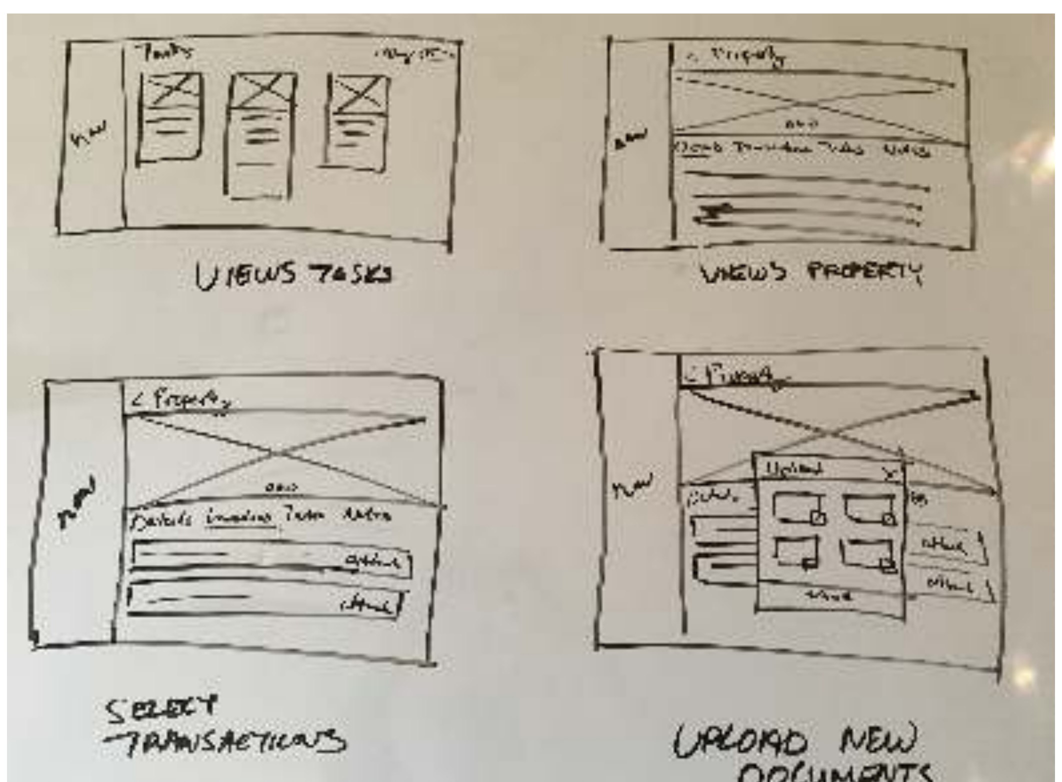

VOID
Call Begins
VOID
Determine Nurture
Next Call

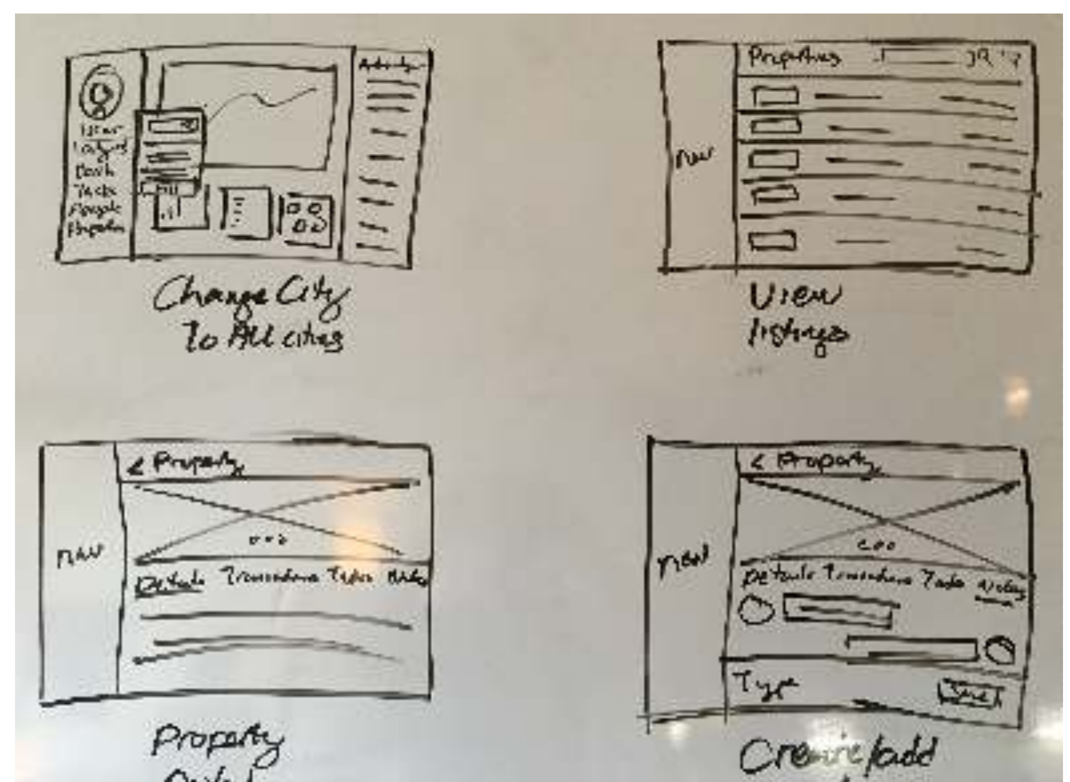

View Pipeline/ Sphere
Return old nurture to hopper
Add Nurture
View & Select

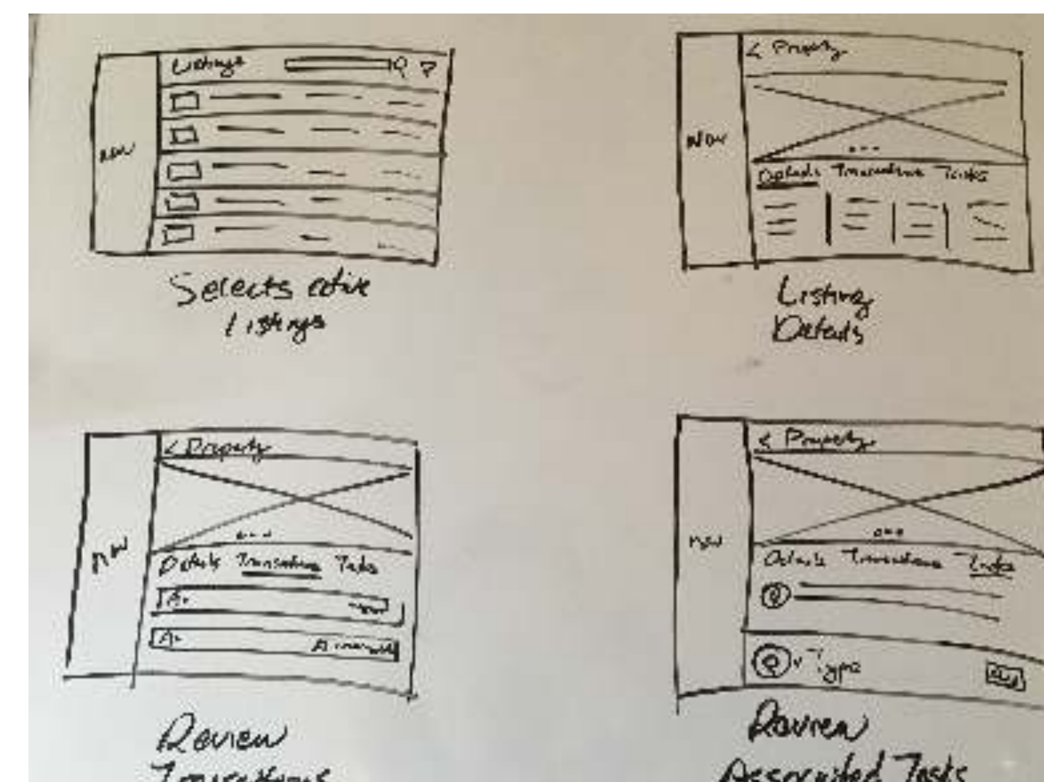

Change City To All cities
View listings
Property Detail

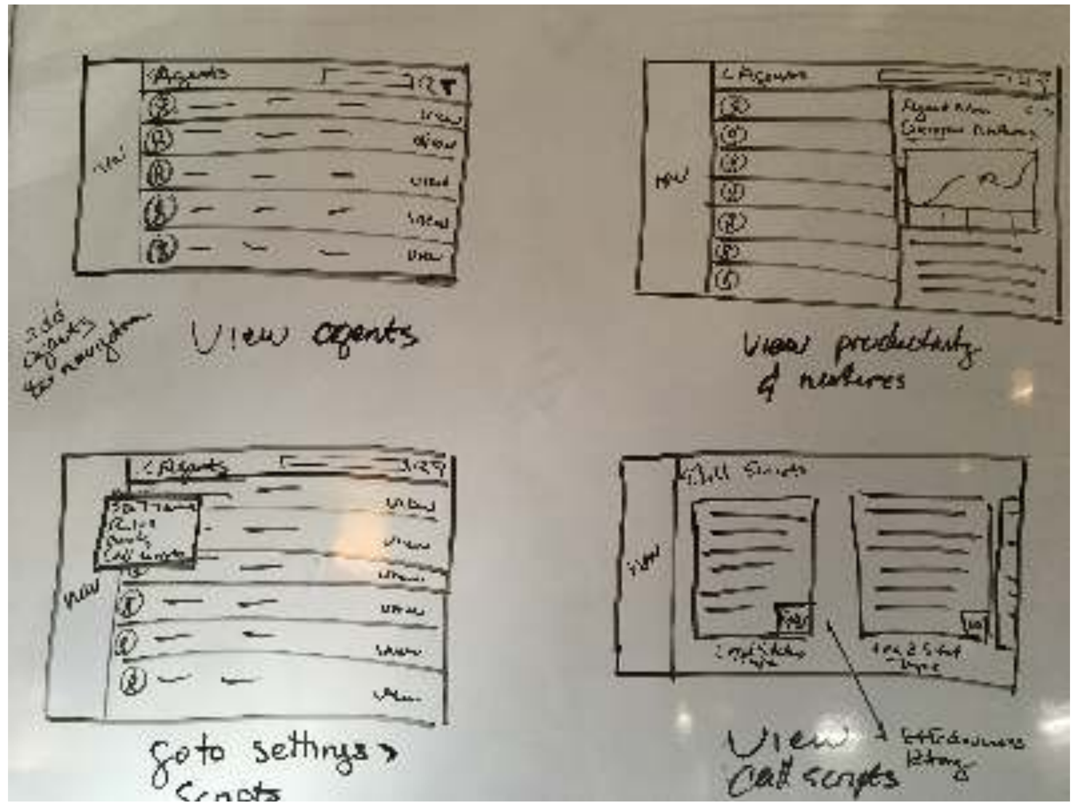

Arrive at Dashboard
View Settings & Select Roles
Select To-Dos
Remove/Add Assignee


VIEW MY TASKS
SORT TASKS

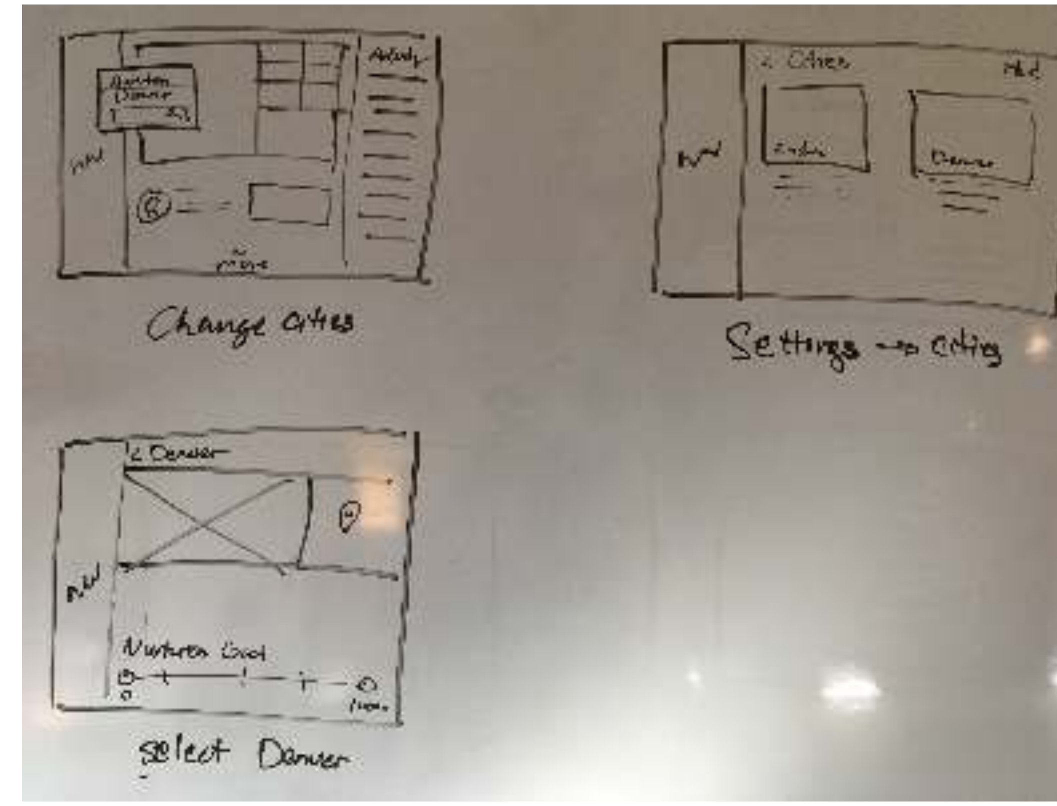

VIEWS TASKS
VIEWS PROPERTY
SELECT TRANSACTIONS
UPLOAD NEW DOCUMENTS


Change City To All cities
View listings
Property Detail

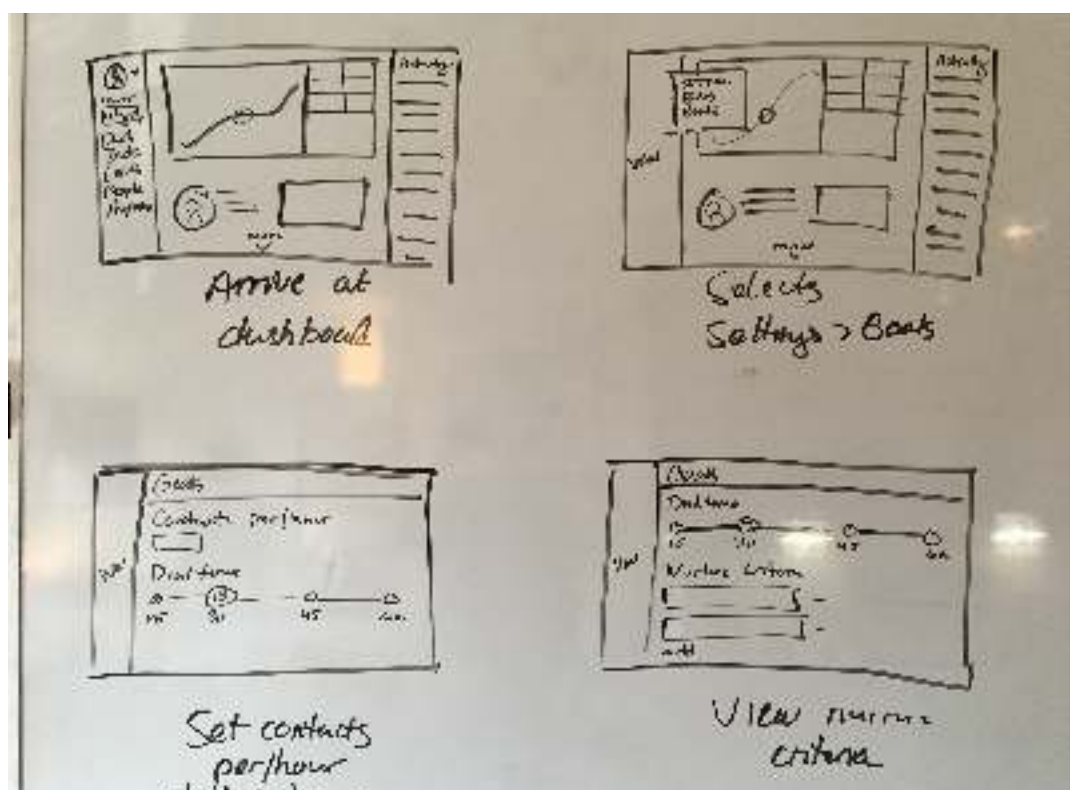

Selects active listings
Listing Details
Review Transactions
Review Associated Tasks



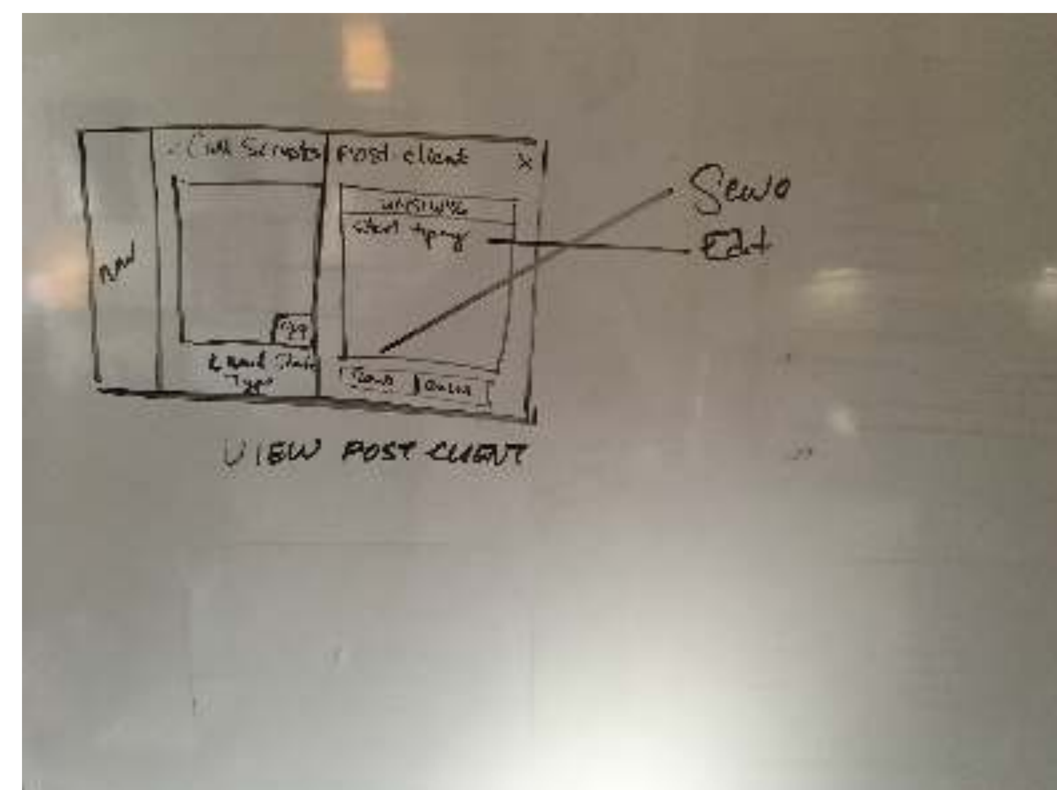
Agents
View agents
View productivity & metrics
go to settings >
Call Scripts
View Call scripts

Change cities
Cities
Settings → cities
Denver
Nurture Goal
select Denver

Arrive at dashboard
Selects Settings > Goals
Goals
Contacts per/hour
Dial time
Set contacts per/hour
View nurture criteria

Call Scripts
Post client
Save
Edit
VIEW POST CLIENT

# Wireframe Prototype

https://invis.io/S6AZSLYKG

# Next Steps

- Feedback on Wireframes by Monday Mar 27
- Feedback on User Stories (Are there more important flows?) by Monday Mar 27

KW HEYL GROUP

- Wireframe Iteration Deliverable on March 30
- Aesthetic Moodboard & Competitive Analysis on March 30

Foundry

# Help with UX Feedback

**Important Feedback Topics to consider on a PER SCREEN basis:**

**REQUIREMENTS**
**CHALLENGES**
**GOOD/BAD EXPERIENCE**

**Document Template**

**https://docs.google.com/spreadsheets/d/143_F15l_FBiqOvkChlI3UIT6Ri_2R0m2flwPR5UwN6w/edit?usp=sharing**

| | Open Mobile App | Review Upcoming Appointments | Select Appointment | Review Listing Details | View Missing Transaction Documentation | If Seller is ready, obtain a signature for any timely docs | Change Status of Lead inside of the appointment to active or nurture |
|---|---|---|---|---|---|---|---|
| | **Requirements** | **Requirements** | **Requirements** | **Requirements** | **Requirements** | **Requirements** | **Requirements** |
| **After talking to a seller lead, we agree to meet about potentially listing the property with Heyl and I have to have all the required documents to sign the seller and escalate the appointment to active.** | | Needs to be able to view activity, and if any leads have changed status so that they can followup if it's an emergency | | Needs as much pertinent information to the seller as possible | | | |
| | **Touchpoint** | **Touchpoint** | **Touchpoint** | **Touchpoint** | **Touchpoint** | **Touchpoint** | **Touchpoint** |
| | Mobile | Mobile | Mobile | Mobile | Mobile | Mobile | Mobile |
| | **Challenges** | **Challenges** | **Challenges** | **Challenges** | **Challenges** | **Challenges** | **Challenges** |
| | | | | | | | |
| | **Experience** | **Experience** | **Experience** | **Experience** | **Experience** | **Experience** | **Experience** |
| | | | | | | | |