

First to Market

Challenge Build



"This is one way to set up a First to Market Strategy,
not the only way. Please adapt for your needs."

Siftline Boards

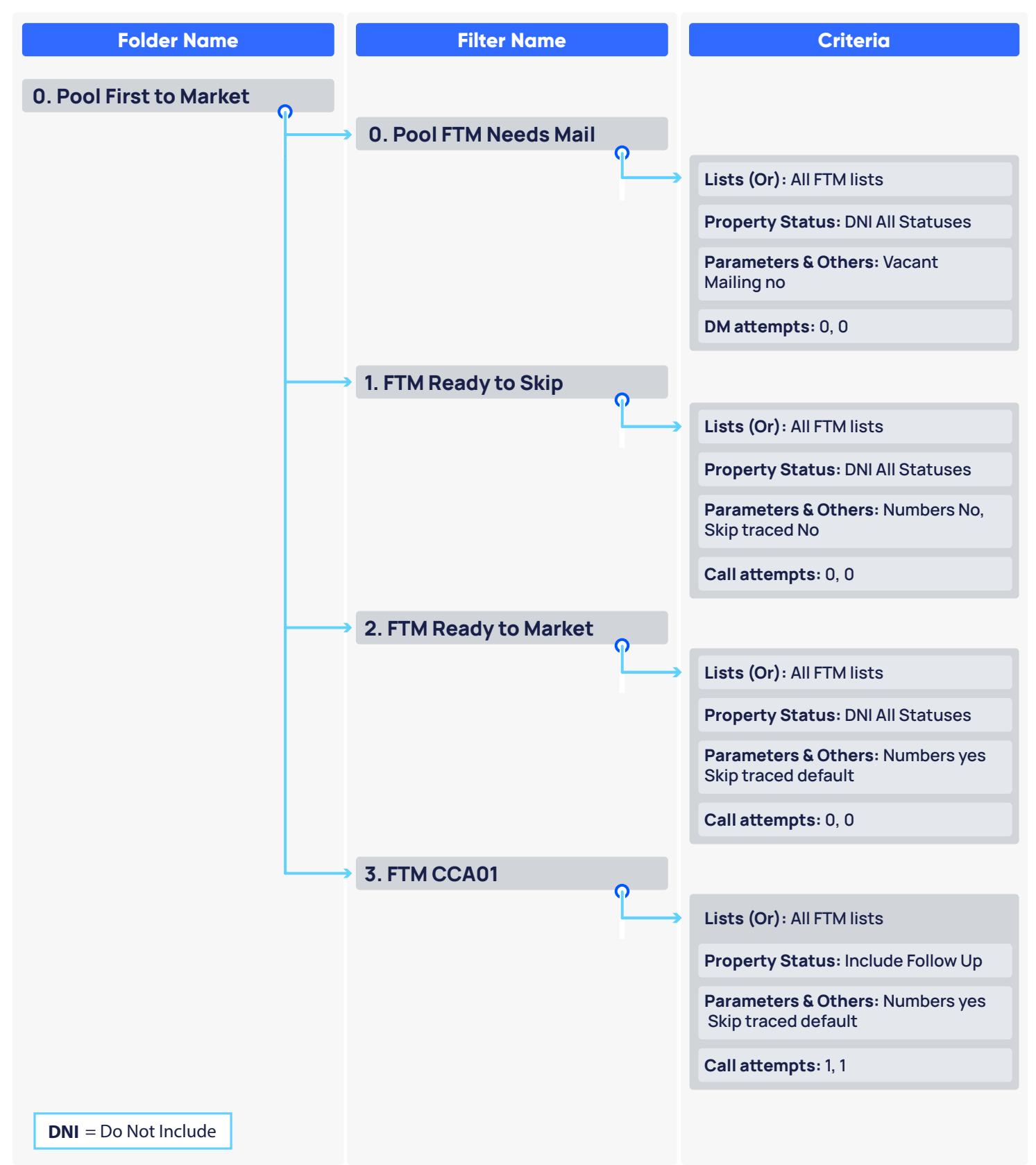
FIRST TO MARKET

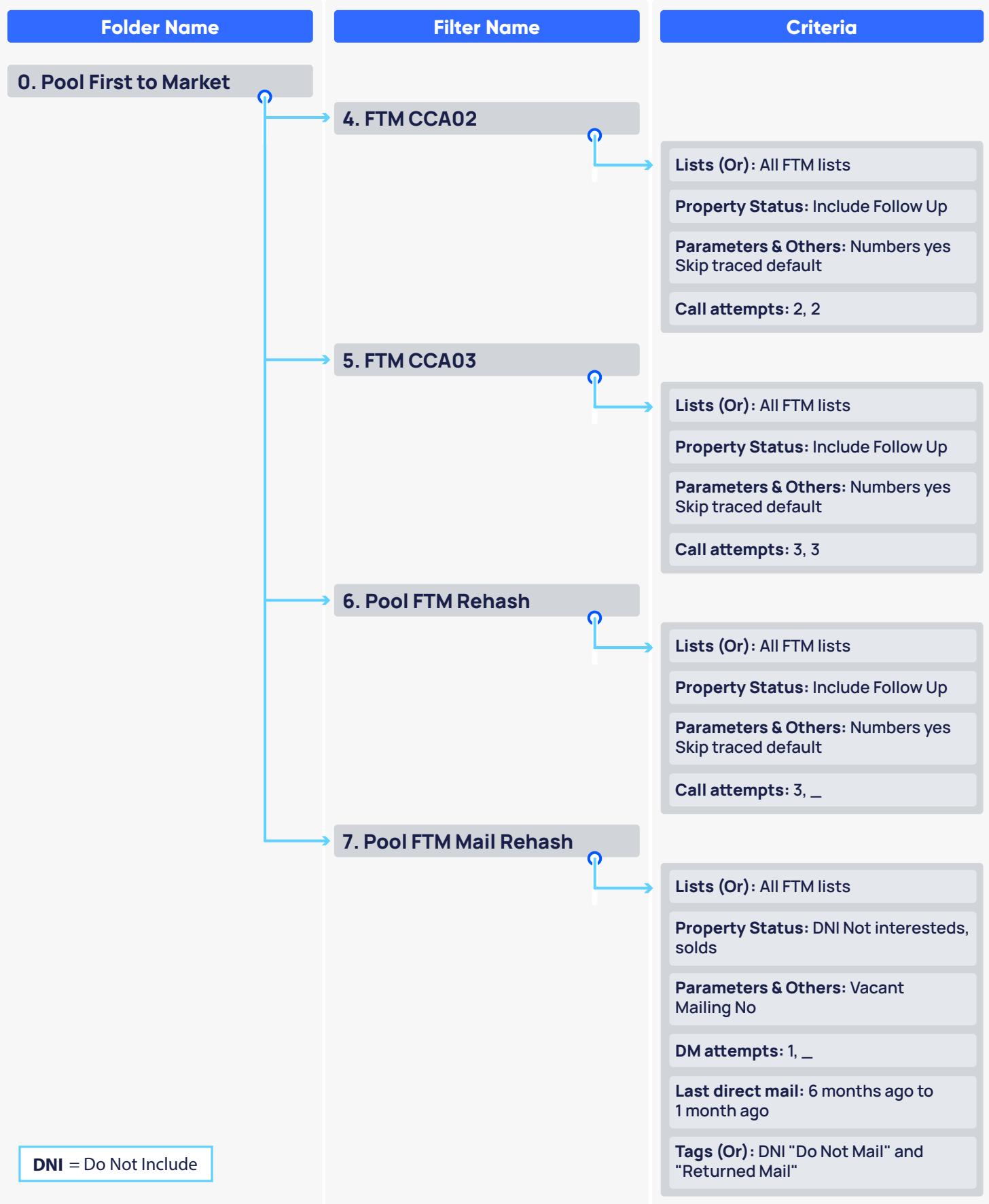
Board 1 - First to Market



- New Lead
- Engage Lead 1
- Engage Lead 2
- Engage Lead 3
- Cold
- Warm
- Hot
- Make Offer
- Offer Follow Up 1
- Offer Follow Up 2
- Offer Follow Up 3
- Offer Accepted
- Offer Declined
- Under Contract
- Pending Assignment
- Waiting to close
- Clear to Close
- Closed \$\$\$
- Converted Not Interested
- Ghosting

Filters





Tasks

1. Call New Lead

Assign: to Lead Manager

Due: 0 Day

Notes: You can use the task round robin to person

Sequence

YOU GOT A NEW LEAD?

New Lead

Lead Management ▾

⌚ WHENEVER A PROPERTY HAS A STATUS CHANGE

Property Status

Lead

*This is only a visual example. Add conditions if you want to narrow down based on this trigger event.

⚙️ ...IF THE PROPERTY STATUS CHANGED...

Only if the following status change happen

FROM

Any

TO

New Lead

👤 ASSIGN THE PROPERTY TO

TO

Choose Assignee

☑ DELETE ALL EXISTING PROPERTY TASKS

* CREATE NEW CARD IN SIFTLINE

BOARD

Lead Management

PHASE

New Lead

☑ CREATE NEW TASK

Call New Lead

⊕ User 1

Assign this task to the property

Assign this task to the property assignee

ℹ️ Sequence Trigger

Initial events to trigger the automation.

ℹ️ Sequence Conditions

Optional extra set of criteria/rules needed for an action to be executed.

ℹ️ Actions

What will automatically happen after the trigger event fires and any optional conditions are met.

What to do now?

WATCH THIS



AND THEN



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