

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

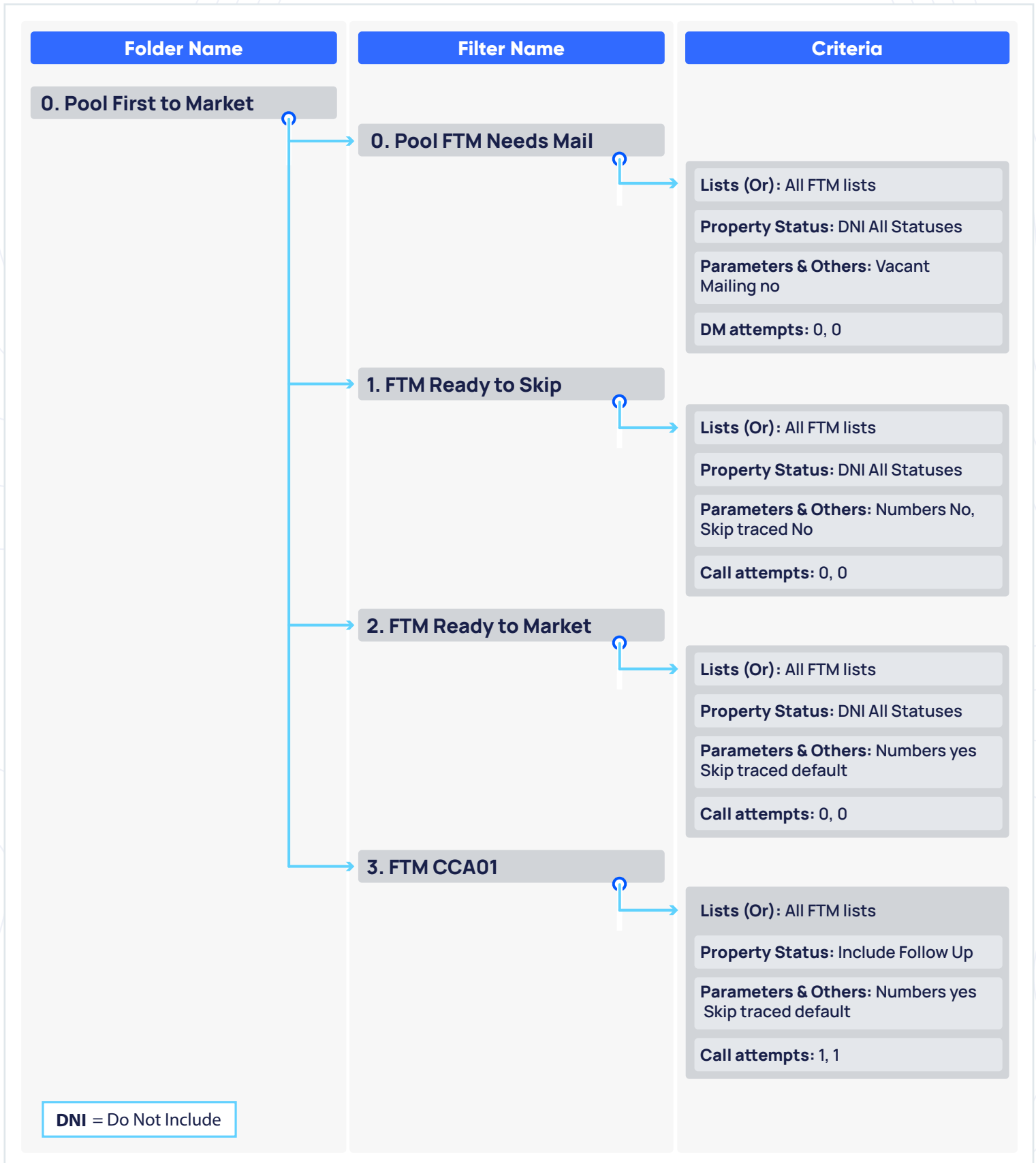
Clear to Close

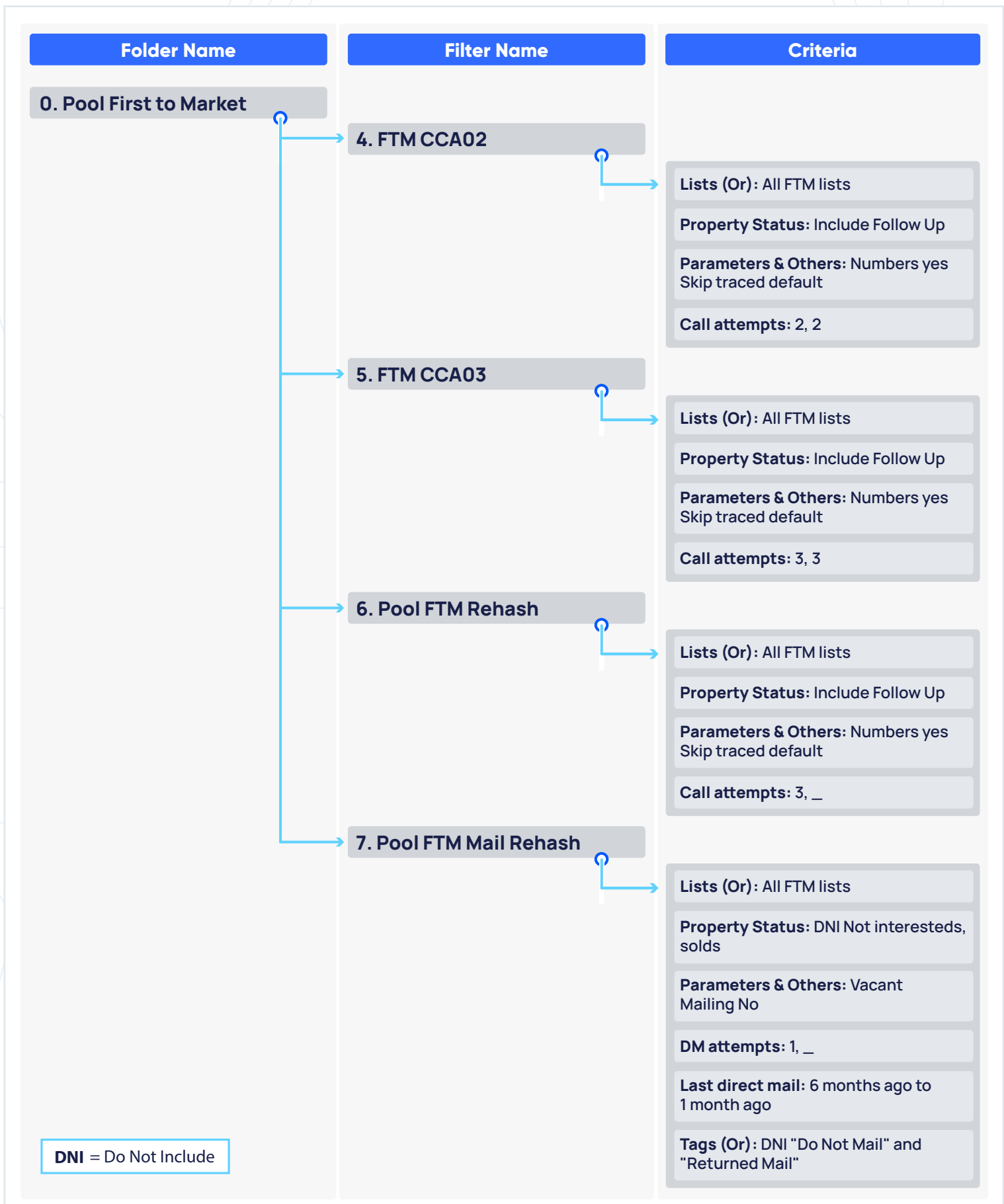
Closed \$\$\$

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

i Sequence Trigger

Initial events to trigger the automation.

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...

i Sequence Conditions

Only if the following status change happen

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

FROM

TO

Any ▾

New Lead ▾

😊 ASSIGN THE PROPERTY TO

i Actions

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

TO

Choose Assignee ▾

✓ DELETE ALL EXISTING PROPERTY TASKS

🚧 CREATE NEW CARD IN SIFTLINE

BOARD

PHASE

Lead Management ▾

New Lead ▾

👤 CREATE NEW TASK

Call New Lead

👤 User 1

☒ Assign this task to the property

☐ Assign this task to the property assignee

What to do **now?**



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THIS**

**AND
THEN**



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