Notes

WiseAgent Demo Video

Composed 02/12/2016 by Kris Freeberg, Economist, Making End$ Meet

Home Page Overview:

1. Call List on left & process for recording past calls & planning future calls.
2. One $24.95 login supports up to five assistants to whom tasks & calls can be delegated.
3. Calendar in center, tracks:
   - Birthdays
   - Wedding Anniversaries
   - Home sale dates
   - Marketing campaign events
   - Transaction critical dates from work flow
   - Appointments with text message or email alerts
   - Tasks, which can be both delegated to assistants, and related to clients.
4. Bottom of home page:
   - Hot List on left
   - Birthdays & Anniversaries on right

Getting Started:

1. Set your profile
2. Create email branding – design signature or copy/paste.
3. Import contacts
4. Sync with Google – if you want the Google sync, do it first before importing contacts from anywhere else. You have to contact support and request the sync. It's not automatic or built into the menu structure. They "flip the switch" on their end.
5. Contacts can be exported.

Contact List & Records:

1. Primary & spouse contact info appear in one record.
2. Contact record features:
   - Categories
   - Sources
   - Rank, for prioritizing
   - Children's names & birthdays, pets' names
   - Important dates, including next contact date
   - Extra phone numbers, email addresses, web site addresses, relationships (hyperlinks to other contact records?) & snail mail addresses.
   - Bottom of summary page:
     - Future calls scheduled
     - Future events scheduled
     - Future tasks scheduled
     - Marketing campaigns in which they're included
     - Contact notes
     - Recent Twitter, Facebook, & RSS activity
     - Referral trail, both from & to
     - Transaction checklists
     - Their search criteria if they're a buyer
     - Attached files & documents. Unlimited document storage.

3. Working with the Contact List:
    - Many-to-one Category-Contact relationship. Like Tags.
    - Advanced Search option: use multiple filters, search multiple categories at once, even locate records with incomplete or missing data.
    - Actions: bulk updates, like adding notes to contacts who were included in a marketing campaign, categorizing, adding to marketing programs, deleting, etc.
    - Print Media: envelopes, mailing labels, hardcopy list

Marketing Tools

1. Drip Campaigns
    - Includes stock programs: FSBO, moving up, expired, etc. - email only
    - You can also set up your own programs that can be a mix of email, snail mail, calls, etc.
2. Letters – pre-written stock letters, or you can write your own. ***Includes prewritten 8x8 campaigns for Expired & Canceled Listings***.
    - Build your own Letter List – list of letters you've decided to use, perhaps edited for your own purposes.
    - Sending letters: select a letter from your list, then it presents you with your Contacts list with a filter window at the top, & Contacts list below if you want to hand-pick recipients.
3. Newsletters: "We create a newsletter for you every month . . . ." 2-pager. Fully branded with your photo & logo.
4. Flyers – print or email. 27 different styles.
5. Capture Forms
6. Email – send a bulk email out to your whole database.
    - Includes e-card type templates
    - Sendout limits: groups of 250, a max of 2500 per day

Transaction Management

1. Checklists:
    - Key dates
    - Tasks – Question: can Due Dates be set to appear on the Calendar?
    - Related Contacts
    - Files
    - Date & time-stamped transaction notes
    - Use to keep client informed of process.
    - Create Fusion web page where client can go to follow progress in real time.
2. Begin by creating checklist templates. They include default templates that you can use & customize.

Integrations & Help

Question: Broker dashboard?