Pre-Launch Preparation Guide

Part 2 of 5*

Your Name: ____________________________________________

*Your Basic Zap Learning Journey consists of 5 parts: (1) Zap Introduction; (2) Pre-Launch Preparation; (3) Launch Day Basics Session; (4) Post-Launch Learning; (5) Post-Launch WebEx.
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Introduction

Congratulations on your upcoming Zap™ launch!

As you will learn during your company’s implementation, Zap combines several consumer-facing and agent tools into a single, integrated platform to help you run your real estate business more effectively and efficiently.

This Pre-Launch Preparation Guide will help get you ready for your Launch Day by providing you with a preview of Zap’s key basic features and functionalities. Follow the instructions and complete the exercises in the sequence laid out in the guide, so that you can get the most out of your Launch Basics Session. Some of the things you will do as part of your pre-launch preparation include:

- Watching videos on the ezZap page. These videos average 2-4 minutes each.
- Completing fill-in-the-blank activities in the guide, using information from the videos.
- Gathering information (e.g. your Professional Info, default welcome email message, etc) for class activities during your Launch Basics Session.

Please bring your completed Pre-Launch Preparation Guide with you to your Launch Live Session.

Be sure to set aside some time every day from now till your Launch Day to complete these pre-launch activities!

Have a great Zap Launch!

The Zap Education Team
I. What is Zap?
Zap is a single, integrated solution designed to help you run your real estate business and drive results.

A. Watch this video on the ezZap Page.

What is Zap?
Duration = Approx. 3 mins

B. Fill in the blanks below with information from the video.

1. Zap’s Consumer and Agent Tools consist of:

<table>
<thead>
<tr>
<th>Consumer Tools</th>
<th>Agent Tools</th>
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<tbody>
<tr>
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</tbody>
</table>

2. If an agent has listings, then that agent’s listings will appear on both the ______________________ and the ______________________ websites.
II. Through the Consumer’s Eyes: An Overview of Zap
Zap’s consumer tools help you connect with your customers. Learn what your customers can see and experience on your broker and agent websites.

A. Watch this video on the ezZap Page.

Zap Overview
Duration = Approx. 11 mins

B. Fill in the blanks below with information from the video.

1. Zap displays accurate, up-to-date listings because it is fed directly by ____________________________.

2. The consumer’s Zap-based preferences and activities are synced and saved ____________________________________________________.

3. List 3 things a consumer will be able to see in the Map view.

   ____________________________________________________________
   ____________________________________________________________
   ____________________________________________________________

4. List 3 things a consumer will be able to see under Your Account.

   ____________________________________________________________
   ____________________________________________________________
   ____________________________________________________________

5. On an agent’s broker site, the agent will always be promoted next to ____________________________.

6. You can see what your customers have been doing on your Zap site by rolling your mouse over their ____________________________.

7. The ZapScore™ can help agents know who to contact at the right ______________ with exactly the right kind of ______________.
III. Getting to Know the ZapScore
Throughout Zap, you’ll find a ZapScore assigned to each of your contacts. A ZapScore is a number that Zap uses to represent your contact’s online activity and engagement level - it helps you to know how active your contact is and whether your contact may be ready for you to reach out.

A. Watch this video on the ezZap Page.

Getting to Know the ZapScore
Duration = Approx. 2 mins

B. Fill in the blanks below with information from the video.

1. List any 3 consumer activities that Zap tracks for the ZapScore.

2. The ZapScore ranks the activities of your client against the activities of other clients in _________________________________.

3. As a client’s activity on your Zap platform _____________________, their ZapScore rises.

4. A high ZapScore could be a sign of the client’s intent to _____________________.

5. The ZapScore updates every ________________________________.
IV. Navigating the Zap CRM Homepage
The Zap CRM is designed to help you find what you need quickly and easily. There are 2 main sections: Navigation Panel (left), and the Dashboard (right).

A. Watch this video on the ezZap Page.

Navigate Zap Homepage
Duration = Approx. 3 mins

B. Fill in the blanks below with information from the video.

1. Your username and password to log into Zap is the same as what you use to log into ____________________________.
2. Clicking on the Zap logo will always bring you back to the ____________________________.
3. When you click on your name or photo, it will bring you to ____________________________.
4. To search for a specific contact, you would click on ____________________________.
5. To see a snapshot of your current business, click on ____________________________.
6. What 3 things can you add when you click on Quick Add?

7. In Zap, your contacts are organized by ____________________________.
8. To review Follow-Up Plans that you can assign to your contacts, click on ____________________________.
9. To get self-help resources on Zap, click on ____________________________.
10. If you can’t locate the appropriate self-help resource you need and would like to ask other Zap users questions, you would go to the ____________________________.
V. Updating Your Agent Website

Complete your agent website to let consumers know more about you and what it would be like to work with you. You can update your agent website as often as you like, so that it’s fresh and up to date.

A. Watch this video and complete this practice exercise on the ezZap Page.

```
Update Agent Website
Duration = Approx. 2 mins
```

B. Fill in the blanks below with information from the video.

1. To review how your agent website appears to consumers, follow these steps:
   a. From the Zap homepage, click on _____________________________. This brings you to My Account.
   b. From here, click on _________________________________.
   c. Then, click on View My Website.
2. The ____________________________________ link can help you drive traffic to your agent website.

C. What do you want your potential clients to learn about you? Craft your About Me statement and Professional Info on the next page. During your Launch Session, you will get the opportunity to add them to your Zap platform.

Tips for writing your About Me statement and Professional Info:
- Convey your personality to connect with potential clients.
- Describe what is important to you and what it would be like to work with you.
- Highlight your experience and areas of expertise.
- Keep it brief and professional. Check your spelling and grammar.
- Do not use HTML tags.
Your “About Me” Statement
Example: I have lived and worked on Whidbey Island for over 30 years. I love the recreation options in the area, from walking and biking the many trails in the state parks to kayaking in the Puget Sound. Let me help you find your next home!

<table>
<thead>
<tr>
<th>My Experience</th>
<th>Credentials &amp; Memberships</th>
<th>Community Involvement</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Your “Professional Info”
Example:

*My Experience:* Involved in 90+ transactions; Experienced in single family residences, condos, multi-family properties, short sales and bank-owned/REO properties.

*CREDENTIALS & MEMBERSHIPS:* Accredited Buyer’s Representative® (ABR®); BA, University of California, Irvine.

*Community Involvement:* Freeland resident since 1985; Volunteer for Freeland Salvation Army.
VI. Understanding Leads Management
Learn how you can use Zap’s CRM to help you manage your leads, and stay in compliance with your company’s leads management business rules.

A. Watch this video on the ezZap Page.

Leads Management
Duration = Approx. 6 mins

B. Fill in the blanks below with information from the video.

Lead & Notification Settings

1. To get your leads flowing the way you want them to, you must first verify or adjust a few things in your Lead and Notification Settings. To access your settings:
   a. On your homepage, click on ________________________________.
   b. Then click on Lead and Notification Settings.

How Leads Flow into Zap

1. Consumer sends their _________________, which is then routed through Zap.
2. Zap creates the ________________ and routes it to the company, and the agent.
3. Zap then calls the agent’s phone.
4. If the agent wants to accept the lead, they will press ____________________.
5. After the agent accepts the lead, they will hear details about the lead. They can then press __________ to call the lead back directly (if phone number is provided), or press __________ to receive a text confirmation of the lead information.

How Zap routes the lead depends on the company’s __________________________.
Where to Locate Your New Leads

1. Go to the ____________________________ section of your Zap homepage.
2. Click on ___________________.
3. Then, click on _______________________ to see the new leads you have accepted.

Some new leads will not have a ZapScore because ________________________________

_______________________________________________________________________.

What Counts as an Update in Zap

The following actions count as an update in Zap:

How You Will Know When You Need to Update Your Lead

1. Zap will send you a ____________________________ email every day, detailing the leads that need to be updated.
2. You can also see this information on your dashboard:
   a. Red means you should contact the lead ________________________________.
   b. Yellow means you should contact the lead by ____________________________.
   c. Green means ______________________________________________________.

Your goal should always be to stay in the ___________________________.

C. **How would you set your lead notifications?** Take some time to think through these questions and indicate your decision. During your Launch session, you will get the opportunity to adjust your leads and notification settings.

1. Do you want to receive text messages in addition to phone calls/emails for new lead acceptance?
   - [ ] Yes
   - [ ] No

2. What are the days and times you will be available to receive leads?

<table>
<thead>
<tr>
<th>DAY</th>
<th>AVAILABLE?</th>
<th>START TIME</th>
<th>END TIME</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mon</td>
<td>Yes / No</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Tue</td>
<td>Yes / No</td>
<td></td>
<td></td>
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<td>Wed</td>
<td>Yes / No</td>
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<td>Thu</td>
<td>Yes / No</td>
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<td>Fri</td>
<td>Yes / No</td>
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<td></td>
</tr>
<tr>
<td>Sat</td>
<td>Yes / No</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sun</td>
<td>Yes / No</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
3. Do you want a welcome email to be automatically sent out to new leads that are added to your Zap platform?

☐ Yes

☐ No

4. What do you want this default email to say? Make the necessary changes to the default message below.

```
I've just created an account for you on my website, giving you access to a powerful real estate website with local data and online search tools. The listings are made available directly from the MLS (Multiple Listing Service), so your home search will always be current and complete. Let me know if you have any questions, or if there is anything I can help you with!
```

5. How would you like to receive notifications for new lead assignment, reassigned lead assignment, requests for info, showing requests and listing appointment requests?

☐ Email and text message

☐ Email only

☐ Text message only
VII. Adding Contacts (One by One)

Entering your contacts into Zap helps you manage your communication with them and allows you to easily create accounts for them on your agent website.

A. Watch this video and complete this practice exercise on the ezZap Page.

Add Contacts (One by One)
Duration = Approx. 2 mins

B. Complete the steps below for adding your contacts with information from the video.

1. From the Zap homepage, click **Quick Add**.
2. Next, click ____________________.
3. Enter the contact’s information in the fields provided, such as first name, last name, __________________, __________________, etc. Some fields are mandatory.
4. Click **Continue** and review the information you have entered.
5. To move on, click ____________________.
6. You will see a preview of the email that will be sent to your contact, including the Welcome Message.
7. Edit the message by clicking in the Message box and making the changes. This email will contain a link for your contact to create a ________________ for their new website account.
8. Finally, click ____________________________.

*You will be adding yourself as a contact during your Basics session.*
VIII. Getting to Know the Contact Profile Page

Keeping your contacts’ information updated is an essential part of doing business. Use Zap’s Contact Profile Page to view, edit, and update your contact’s information.

A. **Watch this video on the ezZap Page.**

![Contact Profile Page Duration = Approx. 4 mins](image)

B. **Fill in the blanks below with information from the video.**

1. To access a client’s Contact Profile Page, you would click on their ____________.

2. To edit a client’s contact information such as their phone number, you would click on the ________________ icon in the section **Basic Info**.

3. What actions can you take when you click on **Actions** in the upper right hand corner of your client’s Contact Profile Page?

   ![Henry Jones](image)

   ![Options](image)

   **Basic Info** | **ZapScore** | **Campaigns** | **Business** | **History**

4. To see your client’s activities on your Zap site, you would click on ________________.

5. To see all past communication you’ve had with your client, you would click on ________________.
IX. Setting Up New Listing Alerts

New Listing Alerts are emails sent on your behalf to your customers to let them know about new listings that match their search criteria. The email prompts them to click back to your website to learn more about the property, where they have the opportunity to request a visit with you or ask you a question. They can also just respond to the email – easy access to you!

New Listing Alerts are by far the most powerful, opened, and read automated drip marketing emails that you can send to your clients and they have your name, face and contact info on every email. New listing alerts keep you connected to your customer throughout their search.

A. Watch this video and complete this practice exercise on the ezZap Page.

Set Up New Listing Alerts
Duration = Approx. 2 mins

B. Complete the steps below for setting up new listing alerts with information from the video.

1. Search for the customer you want to set up the new listing alert for on your Zap platform.
2. Click on their name to go to their ________________ page.
3. Under Actions, click on __________________________. This will bring you to your customer’s account on your website.
4. Search for properties using the search criteria your customer has given you.
5. Then click _________________________________.
6. Finally, click _________________________________.

Your customer will then get an email letting them know that you have set up a new listing alert for them.
X. Emailing Your Contacts
Learn how to send an email to your lead from Zap’s Contact Summary page. This action counts as an update to help you stay in compliance with your company’s lead management business rules.

A. Watch this video and complete this practice exercise on the ezZap Page.

B. Complete the steps below for emailing your leads from the video.

1. Next to the contact’s name, click on the ____________ icon. This will take you to the Contact Summary page.
2. To the left of the Contact Summary Page, you can find:
   a. ____________________________: Profile notes that you may have entered previously and the contact’s ZapScore.
   b. ____________________________: Information related to the properties the contact has been reviewing.
   c. ____________________________: Prior communication history you’ve had with the contact.
3. To the right of the Contact Summary Page is where you will craft your email by entering:
   a. __________________________________________
   b. __________________________________________
4. You can also select a sample email by clicking ______________________ and then choosing the appropriate sample email from the Email Script Library.
5. Once you’re happy with the email, click ________________________________.
XI. Calling Your Contacts
Learn how to log a call to your contact from Zap's Contact Summary page. This action counts as an update to help you stay in compliance with your company's lead management business rules.

A. Watch this video and complete this practice exercise on the ezZap Page.

Call Your Contacts
Duration = Approx. 2 mins

B. Complete the steps below for calling your leads from the video.

1. Next to the contact’s name, click on the ________________ icon. This will take you to the Contact Summary page.

2. To the right of the Contact Summary Page, you can:
   a. Document your call notes.
   b. Locate a sample script from the Phone Script Library by clicking on _________________.
   c. Indicate whether you were successful in reaching your client by selecting either ______ or _____________.

Please bring your completed Pre-Launch Preparation Guide with you to your Launch Live Session.