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) Get Zapped!

Version 16.9.1

Table of Contents

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:

Consumer Tools	Agent Tools

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^TM 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.

    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 **Dashboard** will return you to the dashboard or

   _____.

3. In Zap, your contacts are organized by _____.

4. To see a snapshot of your current business, click on

   _____.

5. To review **Follow-Up Plans** that you can assign to your contacts, click on

   _____.

6. If you can't locate the appropriate self-help resource you need and would like to ask

   other Zap users or the Zap Support team questions, you would go to the

   _____.

7. To get self-help resources on Zap, click on _____.

8. To search for a specific contact, you would

   _____.

9. What 4 things can you add when you click on **+ Add**?

10. To see new activities on your Zap platform, click on _____.

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. 5 mins

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

1. To go to your agent website so that you can update it, follow these steps:

   a. From the Zap homepage, click on _____.

   b. Next, click on _____.

2. Before you can add a video to your agent website, you must first post the video on

   _____ .

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!

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.*

My Experience	Credentials & Memberships	Community Involvement

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 _____.
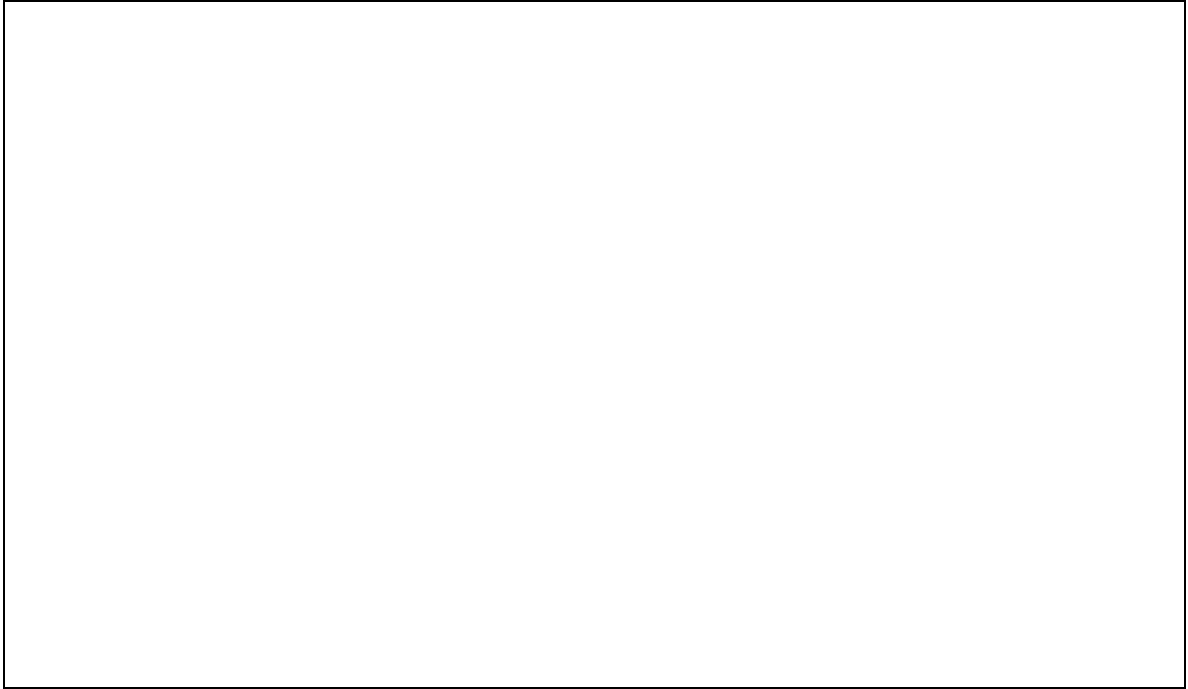   b. Then click on **Lead and Notification Settings**.

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 _____.

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?

DAY	AVAILABLE?	START TIME	END TIME
Mon	Yes / No		
Tue	Yes / No		
Wed	Yes / No		
Thu	Yes / No		
Fri	Yes / No		
Sat	Yes / No		
Sun	Yes / No		

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.

   <div style="border:1px solid black;padding:1em;">
   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!
   </div>

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 **+ 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

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 **More** in your client's Contact Profile Page?

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. From the search results, click on their name to go to their

   _____ page.

3. Under **More**, 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.*

Email Your Contacts
Duration = Approx. 3 mins

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.**