

Getting Started/Setting Up Your Account

1. Watch this 20 minute [Agent Kickstart Webinar](#) - click “register” to attend a live session, or watch a replay immediately to begin setting up your account.

- Watch this [3 min video](#) on your FUB phone number. The most successful agents utilize their FUB phone number for communication with clients!

2. Download the app to your phone

3. Add and organize your contacts:

- [Import your current contacts](#) via CSV or email imports@followupboss.com with your file(s) and they can import your contacts for you! You can include past clients, current leads, and anyone you might do business with.
- [Turn on inbox lead processing](#) and FUB will automatically add your new leads to Follow Up Boss as they come into your email*. **NOTE: In order for you to be able to sync all of your lead platforms to Follow Up Boss, you'll need to make sure that you are using your GMAIL account on all of those platforms. This includes:**
 - Zillow
 - Redfin
 - Veterans United
 - Opacity
 - UpNest
 - OJO
 - Realtor.com
 - And any other platforms that you use for lead generation!

***When you get your FUB account, you'll be instructed to connect your gmail account - this will allow FUB to detect new leads from platforms that share the same email address.**

- ShowingTime will also sync appointments directly into Follow Up Boss - just make sure that your ShowingTime login email is your Gmail account.
- [Organize your contacts by the correct stage](#); the stages in Follow Up Boss will correspond with the Zillow Premier Agent Stages, allowing you to update any Zillow Flex leads directly in FUB. If you're looking for more “stages”/client categories, we recommend [this article about the use of Tags](#) in organizing your contacts on a more detailed level (i.e. Needs Pre-Approval).
 - *Don't skip this step! The most effective tools in Follow Up Boss rely on correct client stages and logging communication in the app.*
 - *Recommended: Generally, we recommend agents to show one property to a client and then ask that they get pre-approved before showing additional homes.*

In FUB, you can create a “Needs Pre-Approval” tag to differentiate these clients. We recommend keeping them in “Met With” status while they have that tag. Once they are pre-approved, you can remove the tag and update them to “Showing Homes.”

4. Start working your contacts - [Watch this 2 minute video on how to start your day with FUB](#)

Step 1: Check your [Smart Lists](#)

Located across your People tab, your Smart Lists contain all the people you want to proactively reach out to. There are different lists built to focus on a different group of contacts- whether it's surfacing brand new leads that still need to be qualified, or past clients that you haven't spoken to recently, your Smart Lists are your home base.

Your goal is to achieve Smart List Zero! This means that each person on the list gets a call, text, or email that day and then drops off the list. Don't worry—they'll automatically reappear after a set time based on that list's settings.

Your next step: Find a contact you're actively working with. Are they in the correct stage? If not, update it. If they are, send them a quick text or email through FUB!

Smart List Key:

- **Important** indicates clients that have been active in the last 14 days
- **Qualify** - Needs Contact are clients that were created recently and still in the "lead" stage; remember, "lead" is the DEFAULT stage - no one should be in there unless they are brand new and you haven't reached out to them yet!
- **Met/Appt Set** are clients still in that stage (Met/Appt Set) that haven't been contacted/updated in more than 6 days - this helps to make sure that you're touching base with clients frequently so that they aren't calling other agents

Step 2: Respond to incoming messages in your Inbox

To the right of your People tab, you'll find your Inbox. Here is where all those messagings from current and prospective clients will pour in. Since your email is also connected, we'll capture any client emails and using your Follow Up Boss phone number will ensure any call or text is captured for you to respond to quickly.

Your Inbox filters out any marketing or personal communications, so you know everything in here is related to furthering your business. Schedule some time in your day to review your Inbox, and respond back to anything that needs your attention. Once you're done, simply hit the “close” button and it will filter out of your Inbox. You can still find each call, text, and email in your client's profile and if they reply back again- back into your Inbox they go!

Your next steps: Double check that your email is connected- we don't want you missing any opportunities. Next, go into your inbox and respond to at least one message.

Step 3: Check off any Tasks

Your tasks in FUB are best used to remind you of time-sensitive and specific follow-ups. If you use them that way, you won't find yourself drowning in tasks, but will instead know what is extremely important to do any given day.

Your tasks are separated into Today, Overdue, and Future so you can easily stay on top of those important to-do's.

Your next steps: Did you promise a client that you would check on something? Find their profile and create a task- be sure to include a date and time to see it on your calendar.

Automations & FUB

FUB uses automations to help you stay in contact with your clients. These automations can be paused individually per client on the right side of the contact screen under "Action Plans." The automation **will also automatically pause when you log communication**.

If you are using your FUB number to communicate with clients, then you don't have to worry about this. If you aren't using FUB to communicate with clients, then you'll want to add any communication under "log call" - this will update the system.

Please be aware of two brokerage automations that are currently active:

- **CSAT Task Reminder** - this automation creates a task in your FUB account to reach out to a Flex client in advance of their Zillow Customer Survey, along with recommended verbiage. Remember, Zillow has regularly scheduled consumer satisfaction surveys which go out 1 hr post connection, 24 hrs post connection/tour, 15 days post connection and 45 days post connection. This is for the 15 day post connection survey!
- **Zillow Agent Prompts/Welcome Email** - this is a brokerage welcome email that thanks the client for their business and encourages them to visit your Zillow profile and add you as their agent. This goes out when you update your status to "Spoke with Customer," so be sure to do that!
 - Remember, the BEST way to make sure you don't have to pay a Flex referral fee is to ask your new and current clients to add you as their agent - this is done right on your Zillow profile (see below). When a client adds you, it means if they ask for more information about a property, the client goes directly to YOU!

Brokerage Policies Regarding FUB

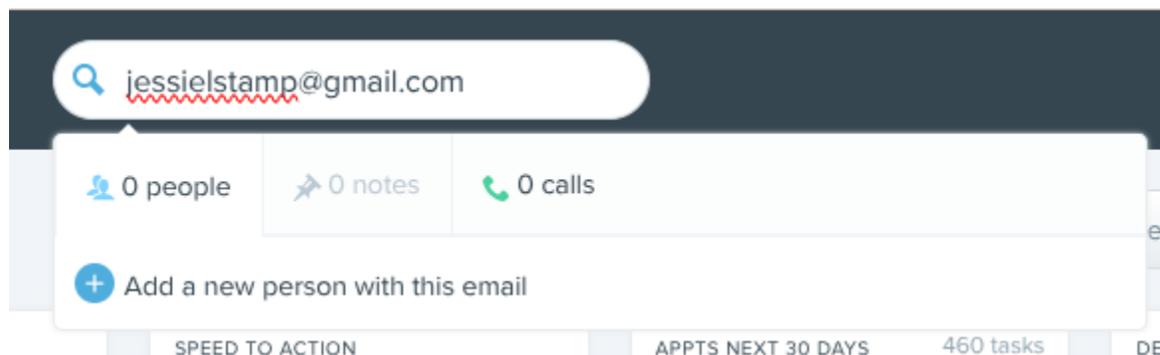
Follow Up Boss is both a phenomenal tool for you to stay in touch with your clients, and gives us all the ability to ensure that our agents are not paying unnecessary referral fees in the event of duplicate leads being sent to our agents. **Use of FUB is critical to being able to prove existing client relationships to referral companies and in the event of BAC disputes.**

These are our expectations of all FUB agents:

1. Add your existing clients into the FUB as soon as possible - this will ensure that we have CRM documentation to provide to anyone disputing the procurement/relationship of a client. Use FUB automation to send that client an invitation to add you as their agent on Zillow - this is HUGE and will save you unnecessary referral fees.

2. **When you begin working with a new client, search FUB to ensure that they are not already working with another Agresti agent.** If they are, email leads@agrestiadmin.com immediately. This client may require a referral fee paid at closing depending on the circumstances. We have not held agents responsible for referral payments in the past, but will need to do so moving forward in circumstances where FUB was not utilized to manage a relationship and therefore provide the necessary documentation to waive a referral fee with the referring company.

Use the search bar in FUB to search the individual's email address. This is what it will look like if the contact does NOT already exist - it will prompt you to add a new person:



3. **FLEX Agents:** Use FUB to update your lead statuses which will keep our Flex team in good operational health - remember, this is a requirement of being in good standing on Flex!

Follow Up Boss Terms

Stages

[Stages](#) are the main way to categorize people in Follow Up Boss. Think: pipeline status. This is where someone is at in their buying or selling journey with you. The stage of someone will inform follow-up cadences, so be sure to keep people's stages updated!

Stages can be found in each person's profile under the "Details" section.

Smartlists

[Smart Lists](#) are like saved searches of your database, highlighting the contacts you need to follow up with. Use filters to find people based on pipeline stage, website activity, last communication and so much more. With smart lists, you'll never miss an opportunity, and you'll be in front of the right people at the right time.

Smart lists are located in your People tab across the top!

Tasks

[Tasks](#) are best used when you have to do a specific task on or by a specific day at a specific time. Ex: Call Tom re: rental at 2pm Saturday. General follow-ups (to touch base and keep and front of people) are best left for smart lists. Why? It's easier to go through a list of general follow-ups that way AND this

will ensure you don't miss any time-sensitive tasks in a sea of follow-ups.

Notifications

Your [notifications](#) are a good place to check to scan and see if you missed any important mentions in notes, etc. We know that it's easy to feel over-notified and miss something because of too many notifications, so be sure to update your notification settings [here](#).

Inbox

Your [inbox](#) is where all of your messages from clients and prospects will be. You see texts received by your Follow Up Boss number, emails, missed calls and voicemails.