

Post-Launch

Learning Guide

*Part 4 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	3
Before We Continue.....	4
I. Using the Knowledge Base & Community	6
II. Managing Follow-Up Plans.....	7
III. Responding to Requests for Info.....	9
IV. Responding to Showing Requests.....	10
V. Adding Agent Insights	11

Introduction

We hope you've enjoyed meeting Zap™ at your Launch Day Basics Session!

This *Post-Launch Learning Guide* and the upcoming Get Zapped! sessions will help you continue to build your knowledge on Zap. 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 Get Zapped! sessions. Some of the things you will do as part of your post-launch learning include:



- Watching videos on the ezZap page. Similar to the pre-launch preparation, these videos average 2-3 minutes each.
- Completing fill-in-the-blank activities in the guide, using information from the videos.
- Trying out activities on your Zap platform.

Be sure to set aside some time every day from now till your Get Zapped! sessions to complete these activities.

Enjoy the rest of your Zap learning journey!

The Zap Education Team

Before We Continue

Before you continue with your Zap learning journey, please do the following. You can find resources on the Knowledge Base or videos on the ezZap Page to help you with the steps.

1. Complete building your Agent Website.

- ✓ Finalize your Agent photo, Cover photo, About Me statement and Professional Info that we started during your Launch Day Basics session
- ✓ Add a video (if you don't currently have one, consider using a recent brand commercial that you can find on YouTube)
- ✓ Add your Social Media links

Resources:

- Knowledge Base: Go to *My Account > My Website*, or search for *Agent Websites*.
- ezZap Page: Refer to the video *Update Agent Website*.

2. (If you currently have active listings) Check that Zap has mapped your MLS membership in your Account Settings.

- a. On your Zap homepage, click **your name or photo**.
- b. Click **Account Settings**.
- c. Click the **MLS Memberships** tab.
- d. If you currently have at least one active listing, Zap will map your MLS ID with your MLS so that your listings appear on your Agent Website. If in the rare occasion you have active listings and Zap has not mapped your MLS ID, then you can easily do it yourself. Refer to the Resources below for steps.

Resources:

- Knowledge Base: Go to *My Account > Account Settings*, or search for *Account Settings*.
- ezZap Page: Refer to the video *Add MLS & MLS ID*.

3. Add at least one new contact to your platform this week. Remember this is one of the 3 Zap Habits – to add at least one new contact every week.

Resources:

- Knowledge Base: Go to *Contacts and Follow ups > Add Contacts to Zap*, or search for *Add Contacts*.
- ezZap Page: Refer to the video *Add Contacts (One by One)*.

4. (if your company has the consumer mobile app) Email the app to the new contact.

To email the app:

- a. Search for the contact you have added by typing their name in the search box at the top of your Zap dashboard.
- b. Click on their name in the search results. That will take you to their **Contact Profile** Page.
- c. Click on the **Actions** drop down on the upper right hand corner, and then select **Email Link to Mobile App**.
- d. Adjust the body of the message (if necessary).
- e. Scroll down the page and click **Send Email**.

If you have added yourself as a contact during your Launch Day Basics Session, repeat the same steps above to email the app to yourself. **NOTE: Download the app at home, not in the office.**

Resources:

- ezZap Page: Refer to the video *Contact Profile Page*.

5. Set up a new listing alert for the new contact you just added.

- a. Search for the contact you have added by typing their name in the search box at the top of your Zap dashboard.
- b. Click on their name in the search results. That will take you to their **Contact Profile** Page.
- c. Click on the **Actions** drop down on the upper right hand corner, and then select **Sign in as Contact**.
- d. You are now signed in as the contact. Put in the search criteria for the contact and then click **Search**.
- e. Click **Receive Email Alerts**.
- f. Click **Save Search**. Make sure that the Get email updates box is checked.

Resources:

- Knowledge Base: Go to *Consumer Site & Apps > New Listing Alerts*, or search for *New Listing Alerts*.
- ezZap Page: Refer to the video *Set Up New Listing Alerts*.

I. Using the Knowledge Base & Community

Zap's Knowledge Base and Community are designed to provide you with access to resources whenever and wherever you need.

A. Watch this video on the ezZap Page.



Knowledge Base & Community

Duration = Approx. 3 mins

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

1. When you log into Zap, you will be able to see the Community _____ on the right of your Dashboard. Just click on a post to read more.
2. If you have a question, you can:
 - a. Review the _____ to see if the question has already been asked previously.
 - b. Type in any key word from your question in the _____ to see if there are existing resources from the Knowledge Base and Community.
3. If you can't find what you're looking for, click on _____ located on the left hand side of the Community homepage.
4. To subscribe to a post or thread that interests you, follow these steps:
 - a. Click on the _____ of the post you would like to subscribe to.
 - b. To the right, click on the **Post Options** dropdown, and select _____.
5. To see all your activities on the Community, click on _____ on the upper left hand corner.

C. Let's get some practice! Complete the following activities.

1. Search for the Knowledge Base article "Understanding the ZapScore™".
2. Subscribe to any of the Frequently Asked Questions post in the Community.

II. Managing Follow-Up Plans

Follow-up Plans give you drip email capability with a huge amount of flexibility. They help you focus your time and attention by identifying the people in your contact pool who are the most important for you to touch base with, or by sending out communications automatically for you.

A. Watch this video on the ezZap Page.



Manage Follow-Up Plans

Duration = Approx. 3 mins

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

Creating a Follow-up Plan

1. On the Zap homepage, click _____ on the left navigation pane.
2. Then click **Follow-up Plans**.
3. On the top right corner, click **+Create Follow-Up Plan**.
4. Enter a name and brief description for the Follow-Up Plan.
5. Select the _____, Timeline to Transact and Client Type.
6. Now you are ready to set up your Touch Point Sequence. You can select any of these methods for each touch point:

METHOD:

7. Select the timing – choose how soon you want to contact the person.
8. Select the script you would like to apply to the touch point.
9. Click _____ to add a new touch point.
10. When you have finished building your touch points for the Follow-up Plan, click **Save**.

Editing an Existing Follow-up Plan

1. On the Zap homepage, click _____ on the left navigation pane.
2. Then click **Follow-up Plans**.
3. Find the plan you'd like to edit, and then click the _____ icon to the right.
4. Make any changes you'd like. When you're done, click _____.

Assigning a Contact to a Follow-up Plan

1. All your new and reassigned leads who don't have a Follow-up Plan will be listed on the Follow-Ups section, _____ tab on your Dashboard.
2. Click _____ next to the contact you'd like to assign a Follow-up Plan.
3. Once you're on their Contact Profile page, go to the **Campaigns** section by scrolling down the page or clicking on **Campaigns** at the top.
4. Scroll down to the **Follow-up Plan** section.
5. Click _____. You'll see a list of Follow-up Plans.
6. Click _____ to add the contact to the appropriate Follow-up Plan.

Changing a Contact's Follow-up Plan

1. Go to the contact's Contact Profile Page.
2. Under Follow-up Plan in the Campaigns section, click the arrow next to _____.
3. Select **Change Plan** from the drop down list.
4. Find the new plan you'd like to assign to the contact, and click _____.

C. Let's get some practice! Complete the following activity.

1. Add at least 3 of your contacts to a Follow-up Plan.

III. Responding to Requests for Info

Quickly finding and responding to a Request for Info lets your customer know that you really value customer service. Learn how to do this in Zap and get that “woohoo” on your Dashboard!

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



Respond to Requests for Info

Duration = Approx. 2 mins

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

1. To find new requests for info, go the My Tasks section on your Dashboard.
2. Learn more about the request by clicking _____.
3. On the left of the Request for Info page, you will see information on the property that the customer has requested info on. You may see a message from the customer on the right.
4. Call or email the customer regarding their request.
5. To update the status of the request:
 - a. Click _____ next to the request on your Dashboard.
 - b. Change the Status by selecting the appropriate option in the STATUS drop down list.
 - c. Then click _____.
 - d. Whenever you change the status of the request from its original status of New, the request will be removed from your Dashboard.
6. To find a request that you've completed previously:
 - a. Click _____ in the left navigation pane.
 - b. Click **Requests for Info**.
 - c. Locate your request for info, then click **View Details**.

IV. Responding to Showing Requests

Quickly finding and responding to a Showing Request from a customer can make all the difference in getting their business. Learn how to do this in Zap and get that “woohoo” on your Dashboard!

A. Watch this video on the ezZap Page.



Respond to Showing Requests

Duration = Approx. 2 mins

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

1. To find new showing requests, go the **My Tasks** section on your Dashboard.
2. Learn more about the request by clicking _____.
3. On the left of the Showing Details page, you will see information on the property that the customer has requested a showing on, including any message from the customer.
4. Call or email the customer regarding their request.
5. To update the status of the request:
 - a. Click _____ next to the request on your Dashboard.
 - b. Change the Status by selecting the appropriate option in the STATUS drop down list.
 - c. Then click _____.
 - d. Whenever you change the status of the request from its original status of New, the request will be removed from your Dashboard.
6. To find a showing request that you've responded to or scheduled previously:
 - a. Click _____ in the left navigation pane.
 - b. Click **Showing Appointments**.
 - c. Locate your showing request, then click **View Details**.
 - d. Update the Status of the request to Completed if you have completed the showing request. You will then be able to add Agent Insights for the property if your local MLS allows public comments on listings.

V. Adding Agent Insights

Using Agent Insights, you can post comments and tags to properties and neighborhoods you've shown. This markets your local activity and knowledge to buyers and sellers on your Agent and Company websites.

A. Watch this video on the ezZap Page.



Add Agent Insights

Duration = Approx. 3 mins

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

1. To access your Showing Appointment where you will add Agent Insights:
 - a. On the Zap homepage, click **Business** on the left navigation pane.
 - b. Then click _____.
 - c. Find your showing, then click _____. This opens up your Showing Appointment screen.
2. If your local MLS does not allow public comments like Property Insights on listings, you will see a _____ on the Your Property Insights section of the Showing Appointment.
3. If your local MLS allows public comments, then:
 - a. First, mark the showing as _____.
 - b. Click **Save**.
 - c. On the right hand side, select up to _____ tags to describe the property. You can also write comments to provide additional insights about the property and the neighborhood. Be mindful of Fair Housing Laws in the comments you write.
 - d. Click **Save**.
 - e. Click **X** on the upper right hand side of the screen to exit.
4. To edit an Agent Insight you have posted previously:
 - a. Locate the Showing Appointment.
 - b. Click the **View Details** button to go to the Showing Appointment screen.
 - c. Make your edits, and then click _____.

- C. *Let's get some practice! Do this activity on your Zap platform by following these steps.*
NOTE: You can only do this activity if your local MLS allows public comments on listings.

Adding Property Insights

1. On your Zap platform, click **+ Add**.
2. Click **New Showing**.
3. This takes you to the Add Showing Appointment page. You will notice this page looks very similar to what you saw in the video with some slight differences.
 - a. **SHOWING PROPERTY:** Enter the address or MLS number of a home you have just toured, or a listing that belongs to you.
 - b. **CONTACT NAME:** You should have previously added yourself as a contact on your platform during your Launch Day Basics session. Search for your name and add yourself as the contact for this Showing.
 - c. **STATUS:** Change the Status to **Completed**.
 - d. **APPOINTMENT DATE:** Select the appointment date for today.
 - e. **TIME:** Select the time.
 - f. **PRIVATE NOTES:** Add any notes to help you remember about the property. This will only be visible to you.
4. Click **Save**. Your Property Insights should now be unlocked on the right, if your local MLS allows public comments.
5. On the right, compose your Agent Insights by selecting the appropriate tags and typing in your comments.
6. Click **Save**.
7. Go to your Agent Website and search for the property (e.g. by using the property's MLS ID number).
8. Go to the Property Details page and scroll down to see the insights you have just added.

*NOTE: You can also go to **+Add** -> **New Agent Insights** -> **Property Insights** and follow the same instructions above.*

Adding Local Insights

1. On your Zap platform, click **+ Add**.
2. Click **New Agent Insights**.
3. Click **New Local Insight**
4. This takes you to the Add Local Insights page.
 - a. **CITY/NEIGHBORHOOD**: Enter the city or neighborhood for which you would like to add the local insights.
 - b. **HEADLINE**: Type in a header for your insight.
 - c. **COMMENTS**: Enter your comments on this city or neighborhood.
 - d. **TAGS**: (Tags are optional) Enter tags that will help you organize your local insights.
 - e. Click **SAVE**
5. Go to your Agent Website and look for the Local Insights you have added for this city or neighborhood.
6. Go to the Property Details page and look for these Local Insights at the bottom of the page.