



# 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!***

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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:

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™ 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**.

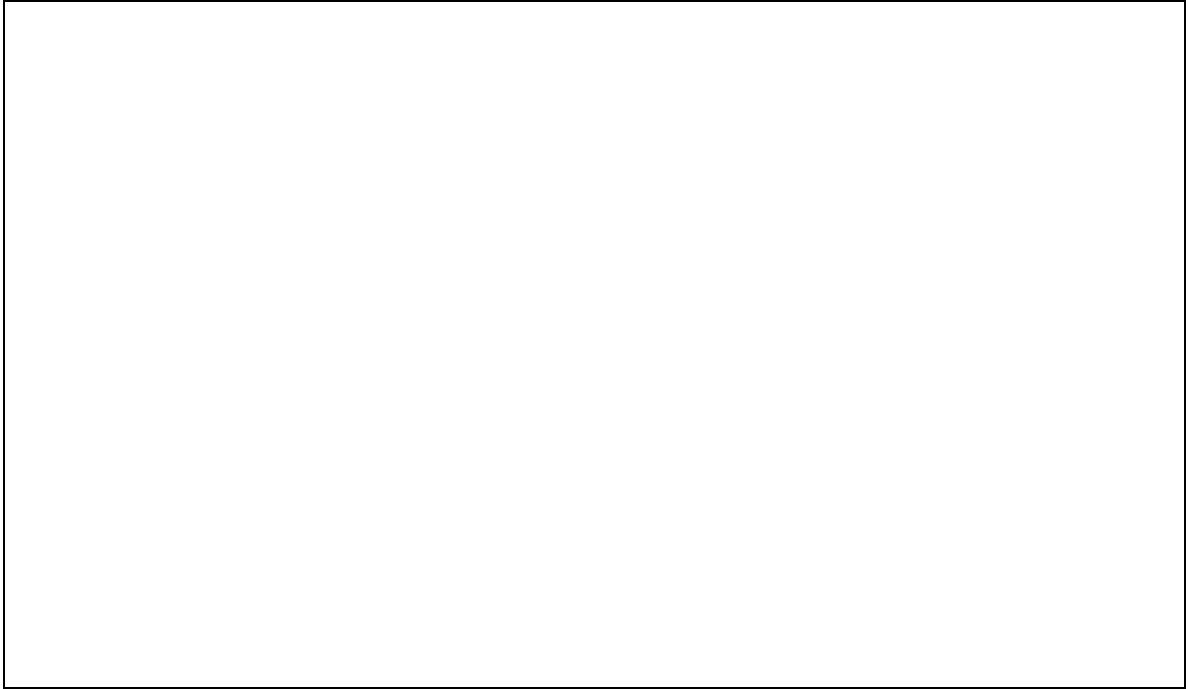
### How Leads Flow into Zap

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?

<b>DAY</b>	<b>AVAILABLE?</b>	<b>START TIME</b>	<b>END TIME</b>
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.

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 **+ 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.**