

PREMIER AGENT APP AND INBOX

Seamless and Intuitive Lead Management



Meet our team



**Katie
Kayrell**



**Angie
Schmidt**



**Kait
Graettinger**



**Drew
Kossen**

Get answers! Available for questions on 'Support Street' in the Hub

The Premier Agent Platform

BRANDING & MARKETING



Agent Profile



Team Profile



Listings

ADVERTISING & LEAD GEN



Premier Agent
Advertising



Premier Agent
Direct

LEAD MANAGEMENT



Premier Agent
App and Inbox



Premier Agent
Concierge

TRANSACTION MANAGEMENT



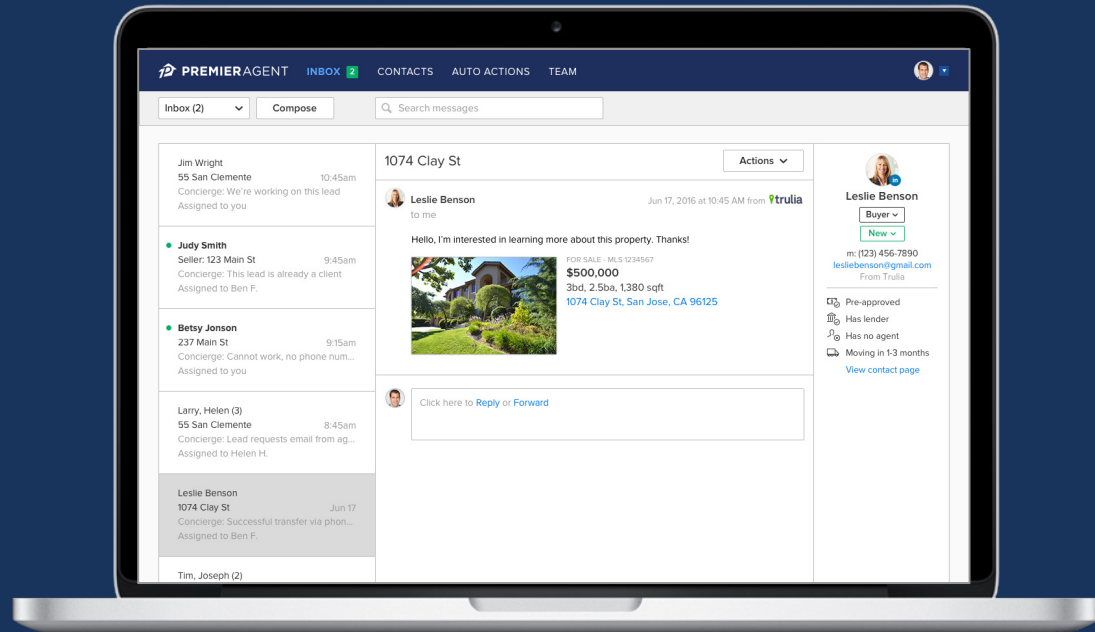
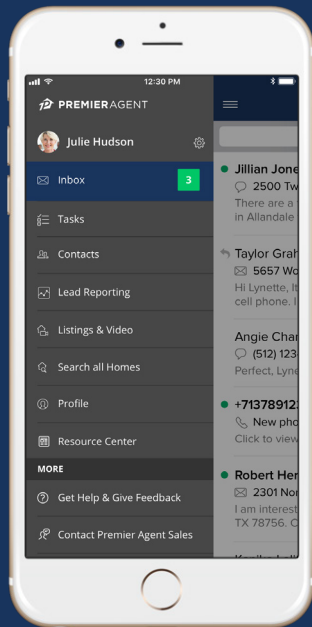
dotloop

Why is lead management important?



Premier Agent App and Inbox:

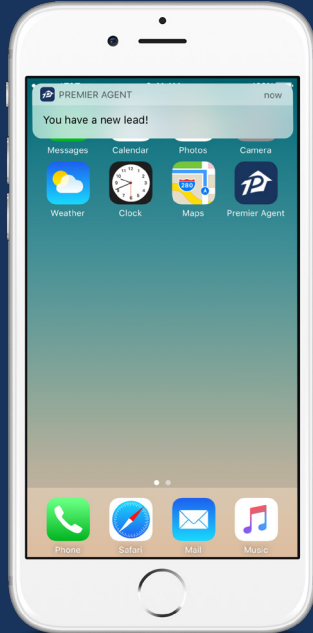
Seamless lead management



Important! Be sure to download or update to the latest version of the app to take advantage of new features

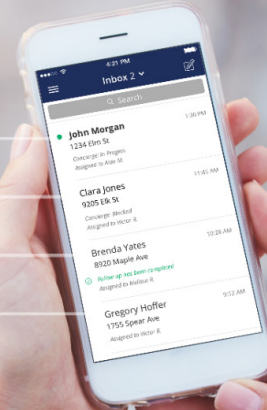
Manage all your leads in one place

From Zillow, Trulia and over 40 other sources



Realtor.com	MarketLeader
Streeteasy	LeadRouter
Kunversion	FollowUpBoss
BoomTown!	HAR
Homes.com	BoldLeads

Plus over 30 additional sources



Today you'll learn how the Premier Agent App and Inbox help you...

- Win the first conversation
- Work leads on-the-go
- Provide stellar service
- Enhance your connections
- Monitor your leads

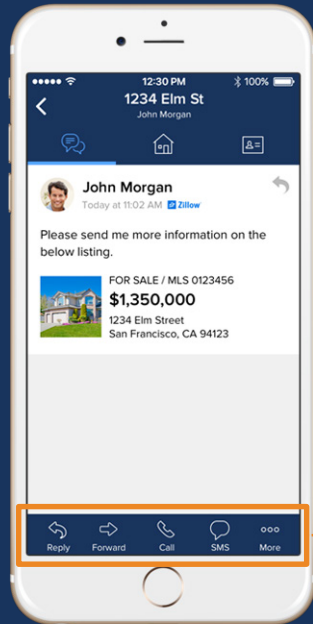
WIN YOUR FIRST CONVERSATION

Respond quickly



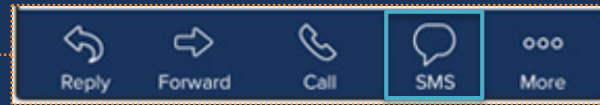
Respond immediately to incoming leads

with the Premier Agent App



Email

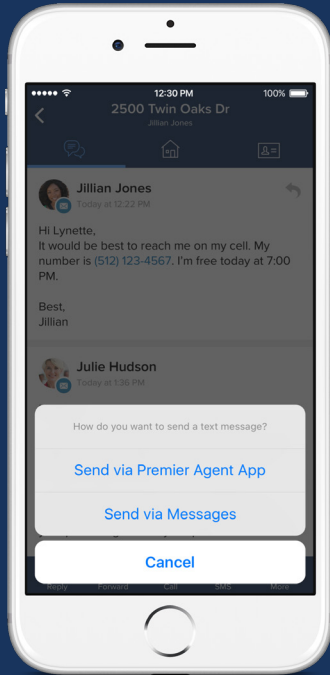
Text



Call

Manage all your text conversations in one place

New!



- ✓ Access your conversations on your desktop, or on-the-go with the app
- ✓ Streamline your ongoing text message threads

Early access! Forum attendees have first access to text messaging in the app

WIN YOUR FIRST CONVERSATION

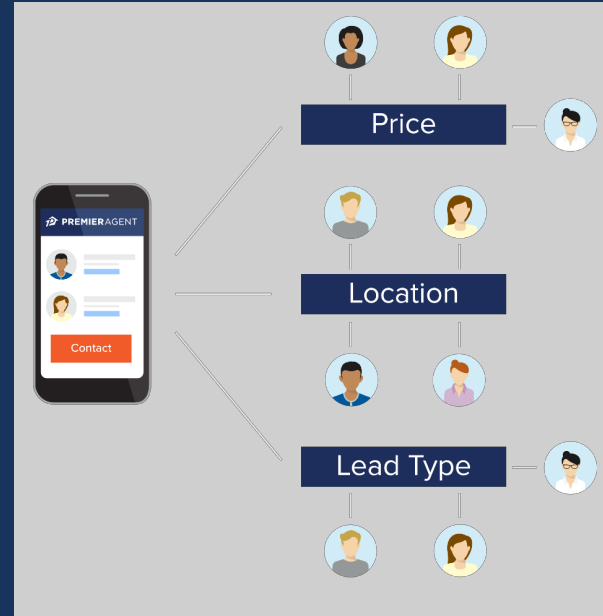
Distribute and assign



Route 'contact form' leads from Zillow and Trulia

Get the right lead to the right team member

- ✓ Routing rules set by location, price or lead type
- ✓ Distribute leads by percentage, round robin, broadcast or to a specific team member(s)



Route leads automatically to your team

Team Management

You're a team lead
As a team lead, you manage team members and create routing rules to distribute your leads.
[Learn more](#)

My Real Estate Team [Edit name](#)
Edit members
Add or delete team members, change permissions and claim contacts.
[Add team members](#)

Team lead routing [Set routing rules](#)

Understanding teams

Delete team

Routing Rules

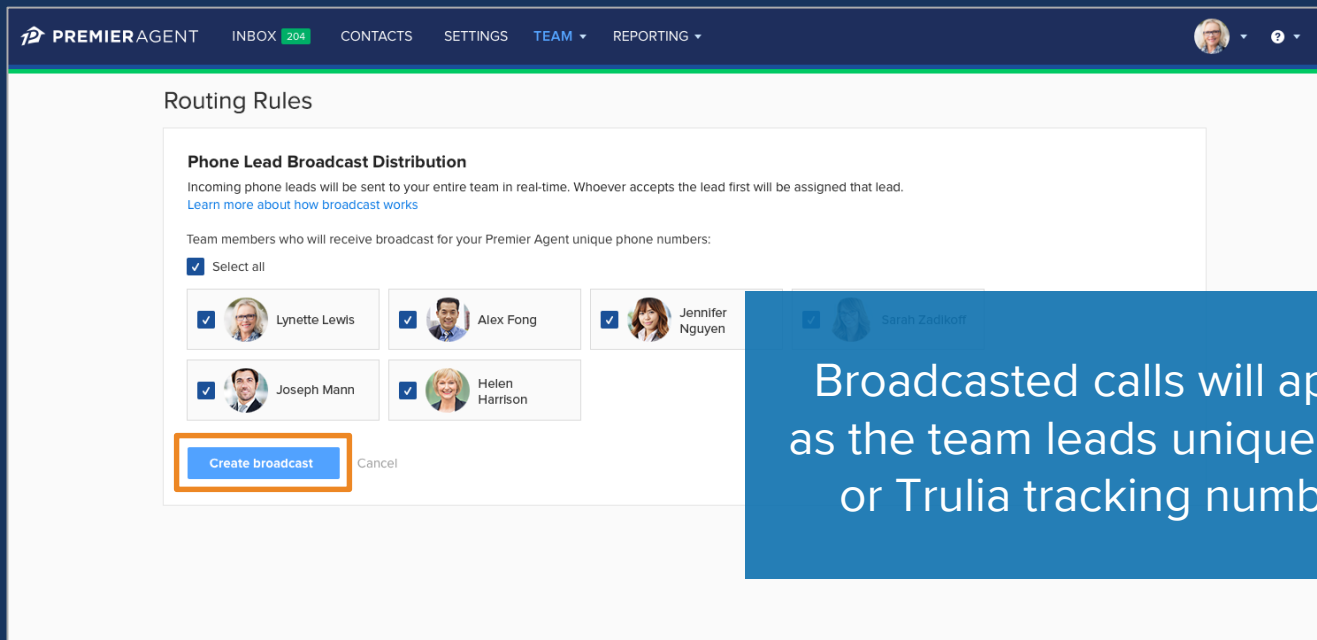
Phone Lead Broadcast
Incoming phone leads will be sent to your entire team in real-time. Whoever accepts the lead first will be assigned that lead. [Learn more](#)
[Set up phone broadcast](#)

Email Lead Rules
NOTE Rules will run in order from the top of the list to the bottom. Any leads not assigned by these rules will be assigned to you.
[Create email rule](#)

Order	Rule	Team Distribution	Leads Sent	Status
1	Leads more than \$1.2M	Lynette Lewis (25%) and 3 others	31	OFF <input checked="" type="checkbox"/> ON Edit Delete
2	Leads less than \$500K	Joseph Mann (50%) and 1 other	18	OFF <input checked="" type="checkbox"/> ON Edit Delete

Broadcast phone leads

Maximize response rate



PREMIER AGENT INBOX 204 CONTACTS SETTINGS TEAM REPORTING







Routing Rules

Phone Lead Broadcast Distribution

Incoming phone leads will be sent to your entire team in real-time. Whoever accepts the lead first will be assigned that lead.
[Learn more about how broadcast works](#)

Team members who will receive broadcast for your Premier Agent unique phone numbers:

☒ Select all

<input checked="" type="checkbox"/>  Lynette Lewis	<input checked="" type="checkbox"/>  Alex Fong	<input checked="" type="checkbox"/>  Jennifer Nguyen
<input checked="" type="checkbox"/>  Joseph Mann	<input checked="" type="checkbox"/>  Helen Harrison	<input checked="" type="checkbox"/>  Sarah Zadikoff

Create broadcast Cancel

Broadcasted calls will appear as the team leads unique Zillow or Trulia tracking numbers.

Tip for team leads! Ensure your team members save the unique tracking numbers in their phone as something memorable

Keep track of every incoming lead

The screenshot displays the Premier Agent software interface. At the top is a navigation bar with links for INBOX (1), CONTACTS, SETTINGS, TEAM, and REPORTING. Below this is a sidebar with an 'Inbox' dropdown and a 'Compose' button, followed by a search bar. The main area shows a list of leads on the left and a detailed view of a selected lead on the right. The selected lead is for '1234 Elm St' by John Morgan, assigned to Lynette Lewis. The lead details include a photo of a house, the price (\$1,350,000), and the address (1234 Elm Street, San Francisco, CA 94123). A 'Notes' section is visible with a 'Write a note' field and 'Save' and 'Cancel' buttons. An 'Assignment' section shows the lead is assigned to Lynette Lewis, with a 'Reassign' link. An 'Insights' section shows details like Type (Buyer/Seller), Loan status (Pre-approved), and Lender (Has a lender).

Lead List:

Name	Address	Status	Assigned To
John Morgan	1234 Elm St	New lead - needs contact	Lynette Lewis
Clara Jones	5155 Sycamore Dr	New Phone Contact	Jennifer Nguyen
+1 (415) 123-4567	New Phone Contact	New Phone Contact	Lynette Lewis
Jessica Diaz	291 Piper Ln	New lead - needs contact	Helen Harrison
Jorge Sanchez	810 Olive Wy	New lead - needs contact	Alex Fong
Tim Anderson	4598 Sacramento St	New lead - needs contact	Victor Webber
Bob Thorton	16 Dogwood St	New lead - needs contact	

Lead Details: 1234 Elm St

John Morgan to me

Please send me more information on the below listing.

FOR SALE - MLS #123456
\$1,350,000
5bd, 4ba, 2,985 sqft
1234 Elm Street, San Francisco, CA 94123

Notes
Write a note
Save Cancel

Assignment [Reassign](#)
Assigned to Lynette Lewis

Insights [Edit](#)
Type Buyer/Seller
Loan status Pre-approved
Lender Has a lender

- View lead assignments
- Track responses
- Reassign leads

The Assignment dropdown menu is open, showing a list of agents. The current assignment is Lynette Lewis. The list includes Lynette Lewis, Alex Fong, Helen Harrison, Jennifer Nguyen, Joseph Mann, and Sarah Zadkoff. Below the list are sections for Insights, Type, Loan status, Lender, Agent, and Timeframe.

Assignment

Assigned to **Lynette Lewis** ▼

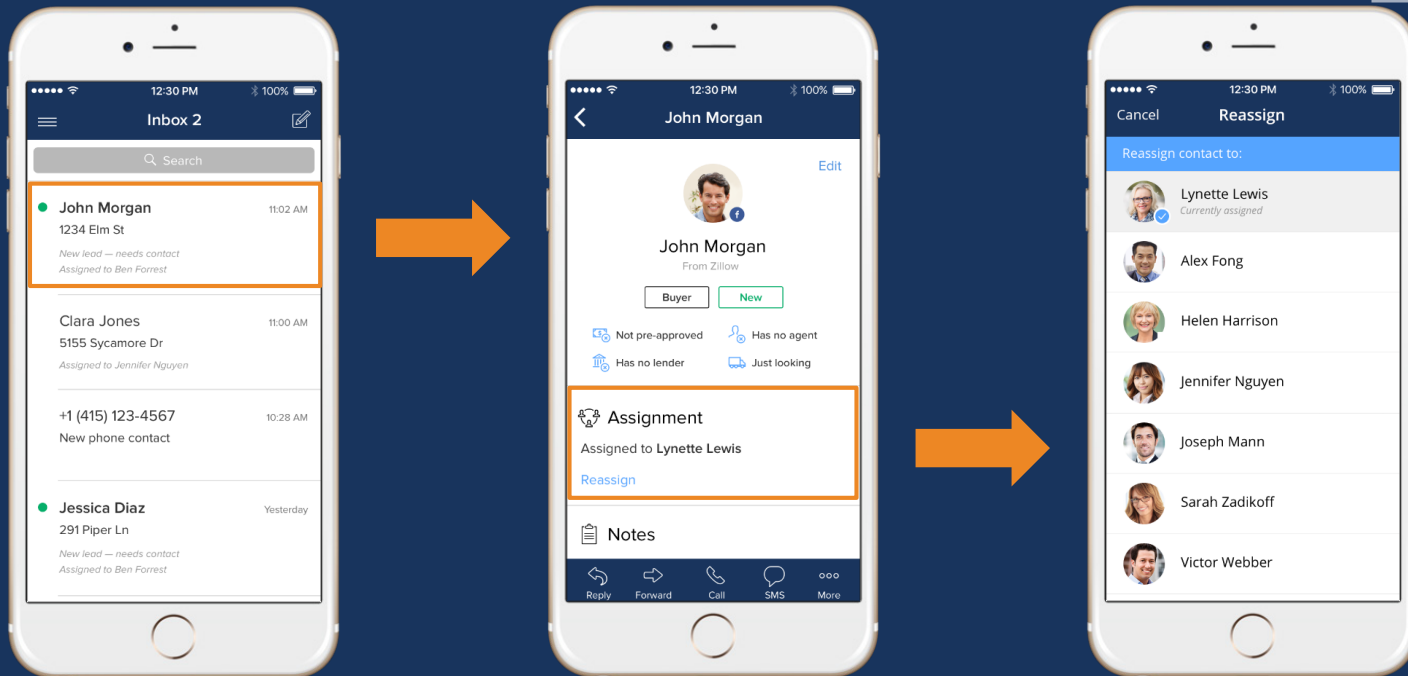
- Lynette Lewis
- Alex Fong
- Helen Harrison
- Jennifer Nguyen
- Joseph Mann
- Sarah Zadkoff

Insights

Type
Loan status
Lender
Agent
Timeframe

Has a lender
Has no agent
Moving in 1-3 months

Manage, track and reassign leads on-the-go



WIN YOUR FIRST CONVERSATION

Speed to service



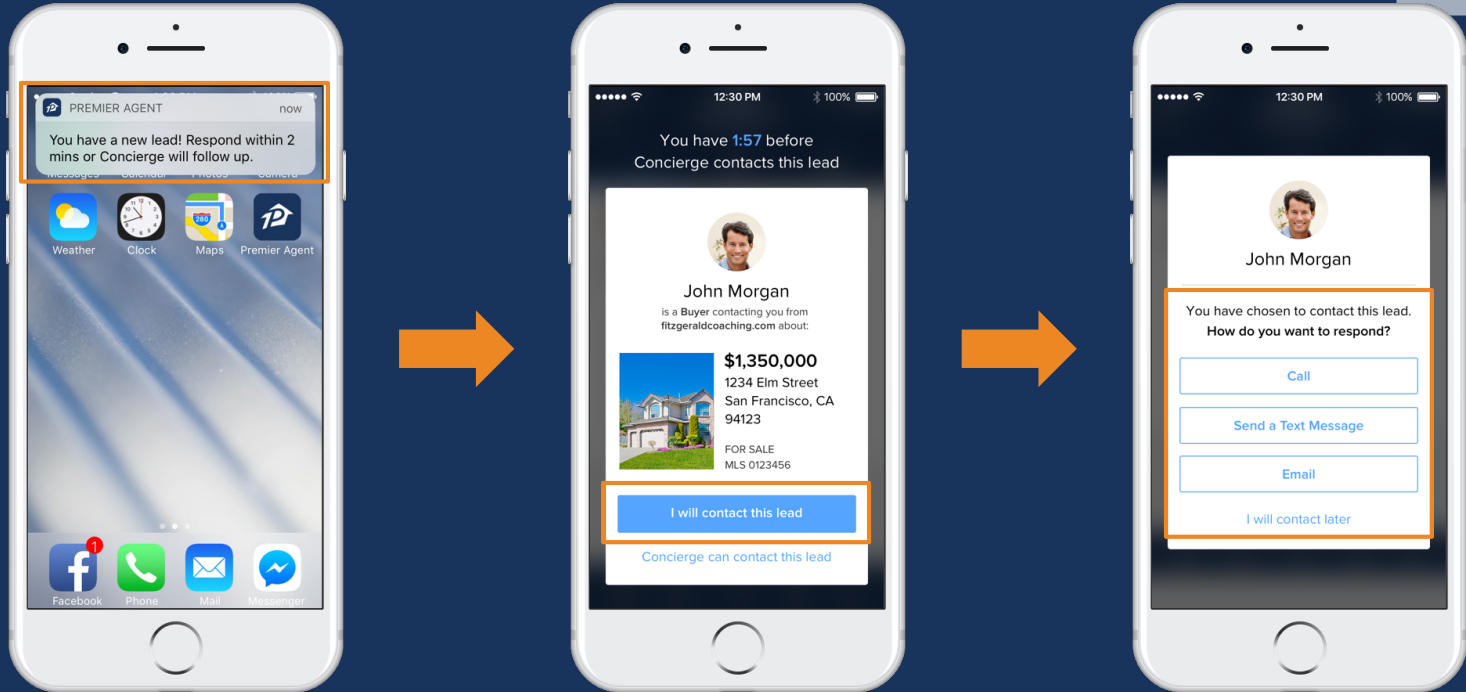
Premier Agent Concierge

Serve potential clients with stellar service

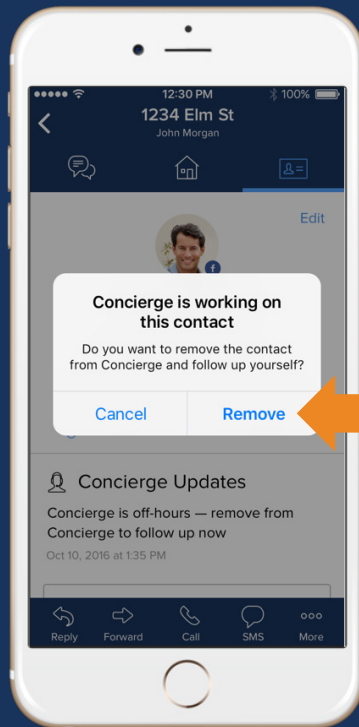


- ✓ Replies on your behalf, seven days a week
- ✓ Responds to incoming leads in under five minutes
- ✓ Ensures home shoppers have a great experience
- ✓ Live transfers active leads ready to speak with an agent
- ✓ For team leads: Broadcasts leads to your team in real time

Choose to respond first



Take back a lead



Answer your phone

Concierge is calling to connect you with an active lead



SAVE Concierge's number

(206)-539-0456

ANSWER when they call

WIN YOUR FIRST CONVERSATION

Know what they want
before you have to ask



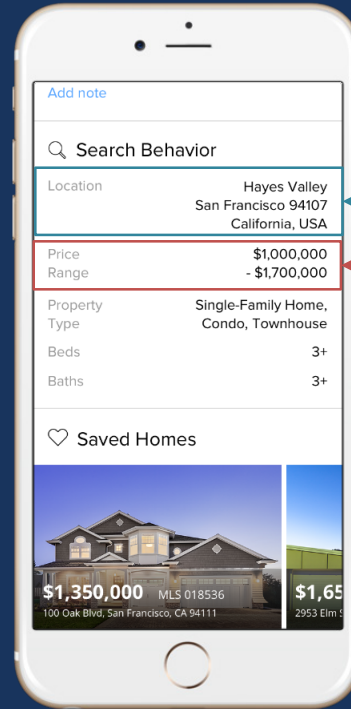
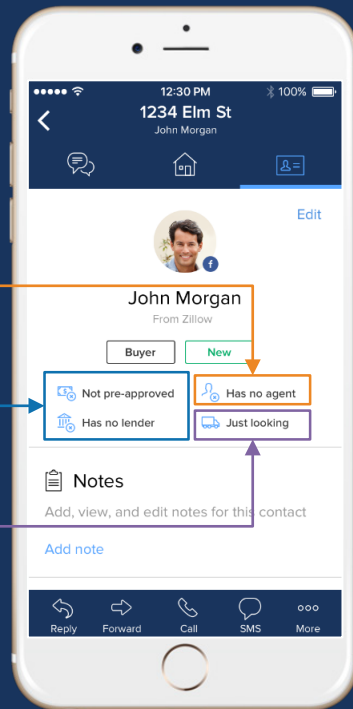
Have productive conversations

Buyer insights

AGENT

MORTGAGE

MOTIVATION



LOCATION

PRICE

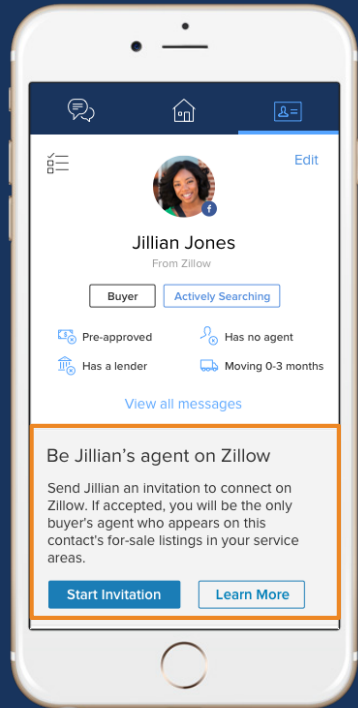
ENHANCE YOUR CONNECTION

Cement your relationship



Strengthen your relationships on Zillow or Trulia

New!




1. In the App, navigate to the contact
2. Send invitation to connect on Zillow or Trulia
3. If accepted, you will be the only buyer's agent who appears on for-sale listings this contact views

Tip! Send a follow-up text after inviting clients to connect on Zillow or Trulia to add a personal touch and boost your rate of connection

basics from plumbing and electrical to energy efficient LED lighting throughout, along with quartz counters & custom cabinets in the kitchen, 10' ceilings on the main floor & ceilings on the lower yard with a great tree, a high efficiency furnace & a tankless water heater. A new

CONTACT YOUR AGENT



Julie Hudson

★★★★★ (112)

(512) 789-1234

PREFERRED AGENT

I am interested in 2500 Twin Oaks Drive, Austin, TX 78757

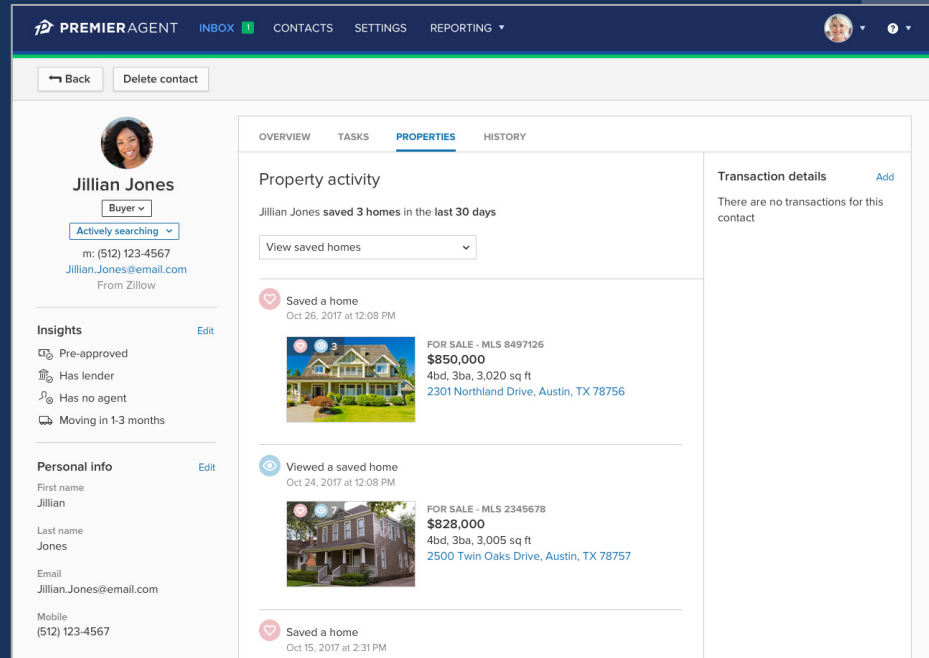
Send

You indicated you were working with this agent.
 Not your agent? Click here to remove this agent.

A window into what your client's want

Coming soon!

- ✓ Get more insights into their ongoing home search activity
- ✓ Have smarter, more detailed conversations
- ✓ Show them you understand what they're looking for



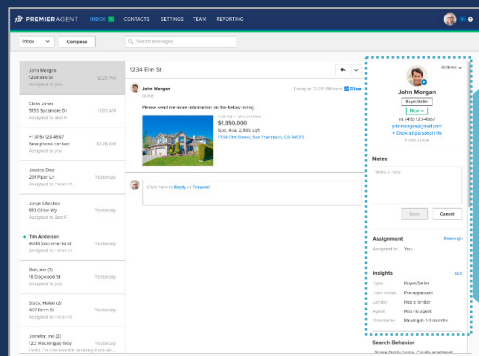
Coming soon! This feature will be available in 2018


MANAGE YOUR PIPELINE

Never forget a detail



Keep track of your client's unique details





Actions ▾

John Morgan

Buyer/Seller

New ▾

m. (415) 123-4567

johnmorgan@gmail.com

+ Show all personal info

From Zillow

Notes

Write a note

Save Cancel

Assignment

Assigned to You

Reassign

Insights

Type Buyer/Seller

Loan status Pre-approved

Lender Has a lender

Agent Has no agent

Timeframe Moving in 1-3 months

Edit

New ▾

New

Attempted contact

Appointment set

Met with lead

Casually searching

Actively searching

Submitting offers

Listed

Under contract

Closed

Unresponsive

Rejected

Insights

Type Buyer/Seller

Preapproved Yes ▾

Has Agent No ▾

Has Lender Yes ▾

Time-Frame 1-3 Months ▾

Cancel Save

- Communication attempts
- Contact status
- Lead type
- Timeframe
- Transaction details
- Notes

Make updates on-the-go



Filter your leads based on status and timeframe

PREMIERAGENT INBOX 204 CONTACTS SETTINGS REPORTING

Search contacts

Filter options

Add Contact

All Contacts

All Contacts

New

Attempted contact

Appointment set

Met client

Casually searching

Actively searching

Submitting offers

Listed

Under contract

Closed

Unresponsive

Rejected

Timeframe

☐ See contacts with reminders

	Name	Timeframe	Reminders
	Betsy Jonson	3-6 mos.	Yes
	Kathy Anderson	-	Yes
	Leslie Benson	1-3 mos.	No
	Bob Thorton	6-9 mos.	No
	Stacy White	1-3 mos.	Yes
Jun 18	Jonas Matthews	3-6 mos.	Yes
Jun 14	Jennifer Mockingjay	1-3 mos.	Yes
Jun 8	John Morgan	1-3 mos.	No
Jun 1	Celeris Fauntleroy	Now	No
May 29	Jared Marcus	3-6 mos.	Yes
May 27	Sally Armstrong	Just looking	No
May 20	Judith Paltow	1-3 mos.	No

PREMIERAGENT INBOX 204 CONTACTS SETTINGS REPORTING

Search contacts

Filter options

Add Contact

Export to CSV

Casually searching

Timeframe

☐ See contacts with reminders

Date	Status	Name	Timeframe	Reminders	Type
Jun 23	Casually searching	Stacy White	1-3 mos.	Yes	Buyer
Jun 8	Casually searching	John Morgan	1-3 mos.	No	Buyer/Seller
May 29	Casually searching	Jared Marcus	3-6 mos.	Yes	Buyer
Apr 24	Casually searching	Michael Angelus	6-9 mos.	No	Buyer
Apr 20	Casually searching	Kim Thompson	1-3 mos.	No	Buyer
Apr 16	Casually searching	Edward Michaels	3-6 mos.	No	Buyer

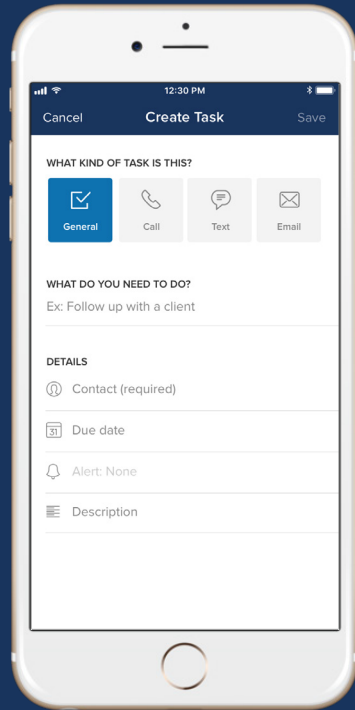
MANAGE YOUR PIPELINE

Take control of your work day



Tasks and reminders to keep you on track

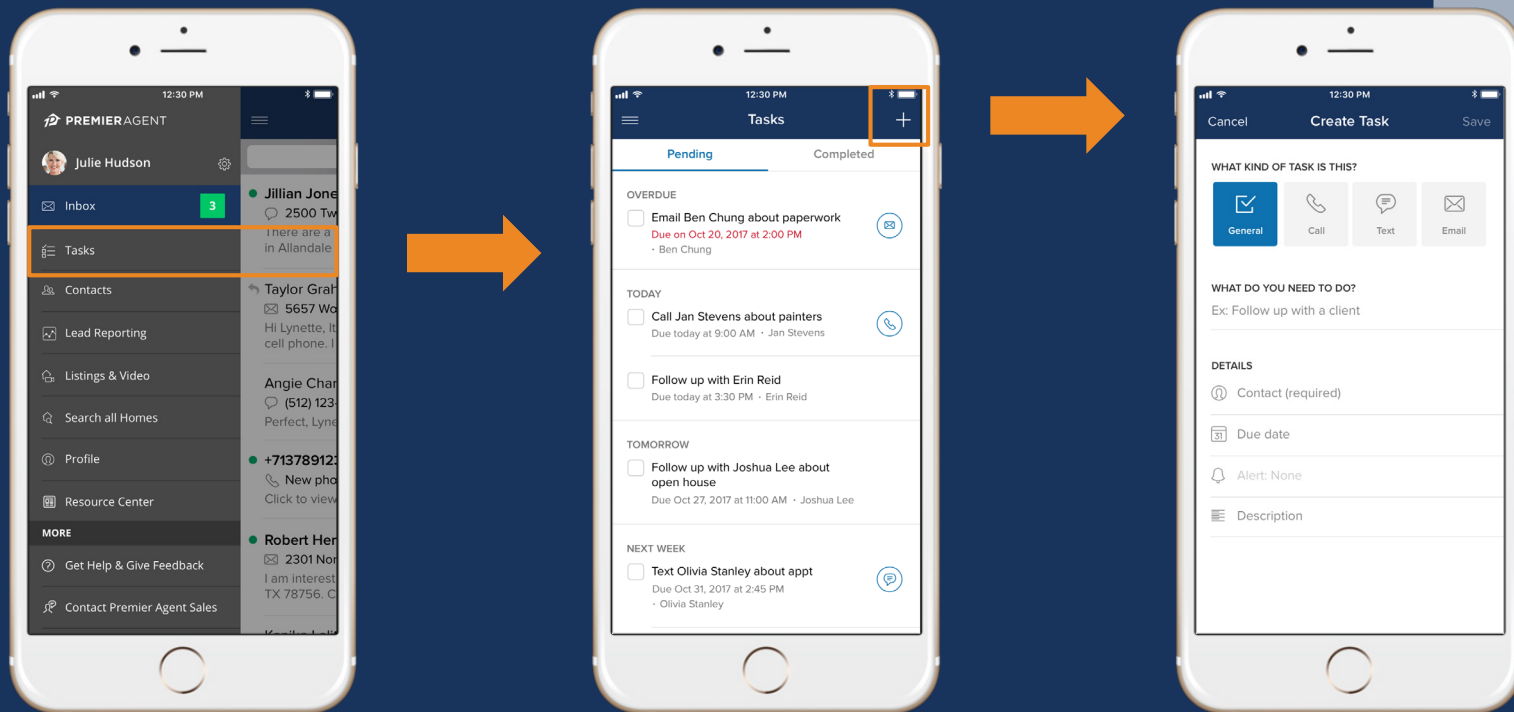
New!



- ✓ Create tasks for yourself that are unique to each client
- ✓ Stay organized by setting due dates and reminders for the day ahead
- ✓ Quickly set up common tasks with pre-filled intelligent suggestions

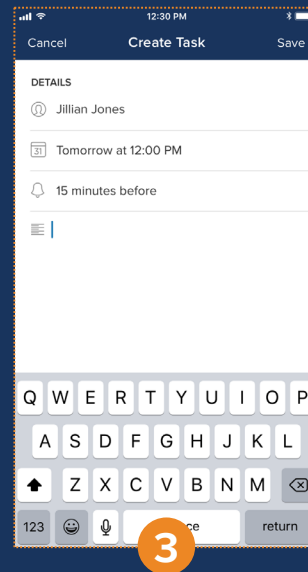
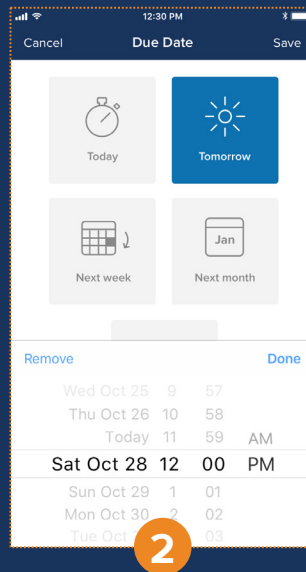
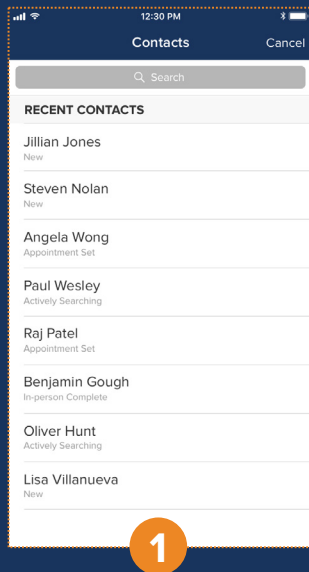
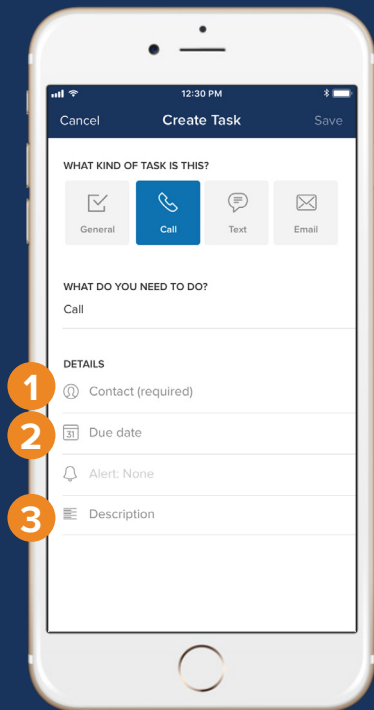
Early access! Forum attendees have first access to tasks in the app

Manage your tasks



Early access! Forum attendees have first access to tasks in the app

Create a new task



Early access! Forum attendees have first access to tasks in the app

PREMIER AGENT FORUM 2017

Post call prompt

New!



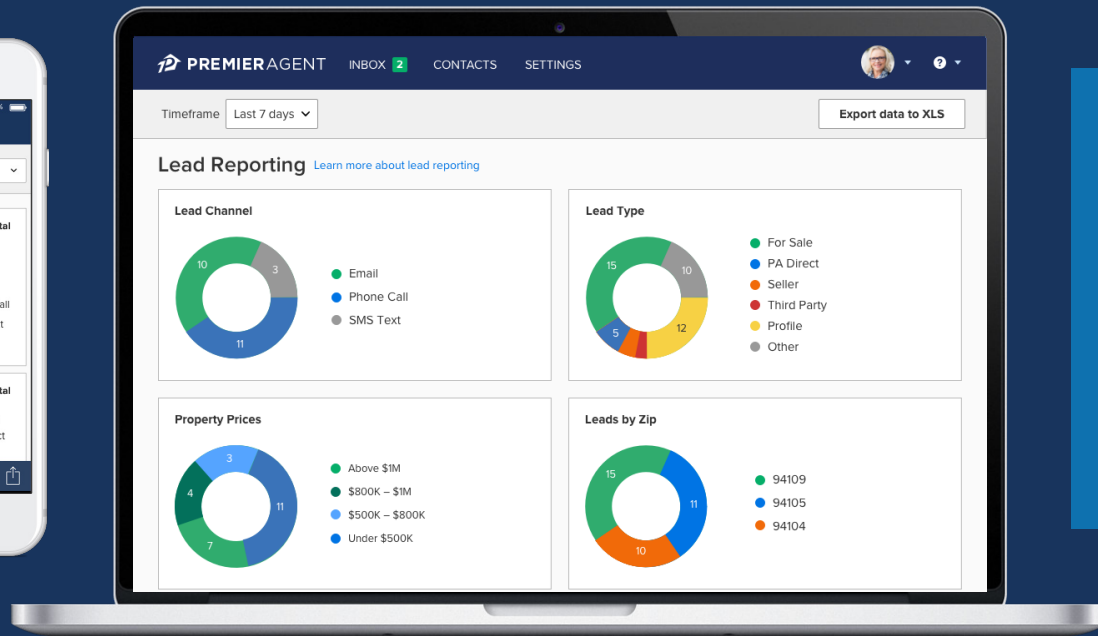
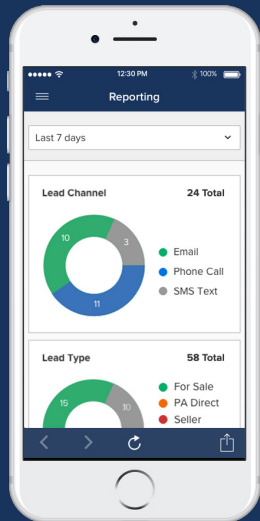
After completing a phone call via the app, you'll be prompted to:

- ✓ Confirm if you were able to connect
- ✓ Update the contact status
- ✓ Add a note

MONITOR YOUR LEADS



Get an aggregate view of all your leads

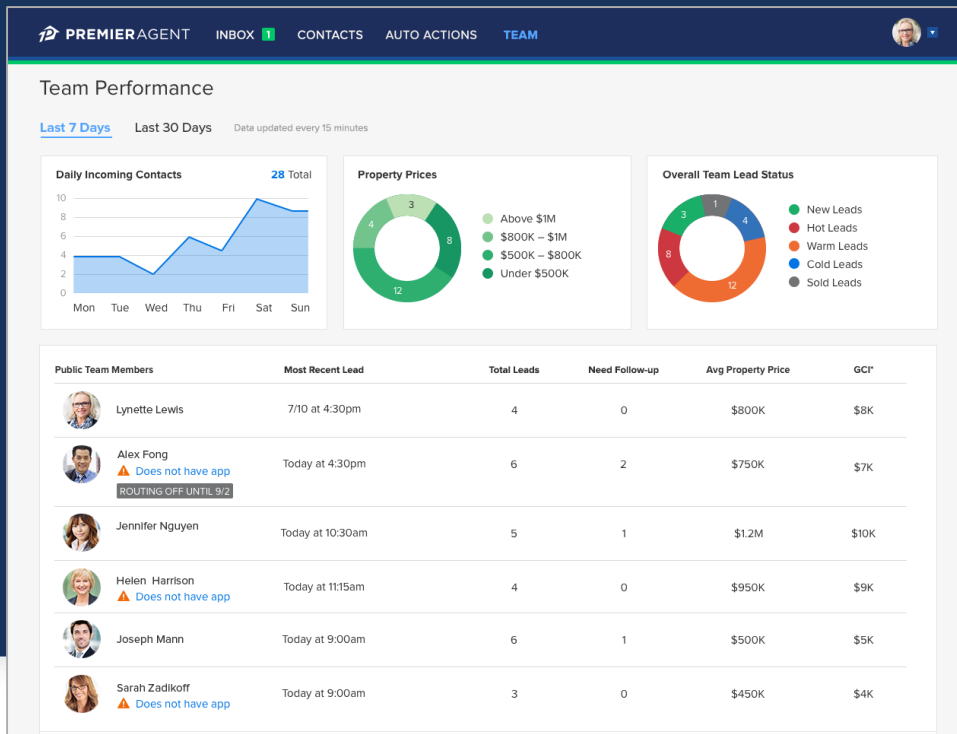


Incoming leads grouped by:

- ✓ Channel
- ✓ Type
- ✓ Price
- ✓ ZIP code

Monitor team performance

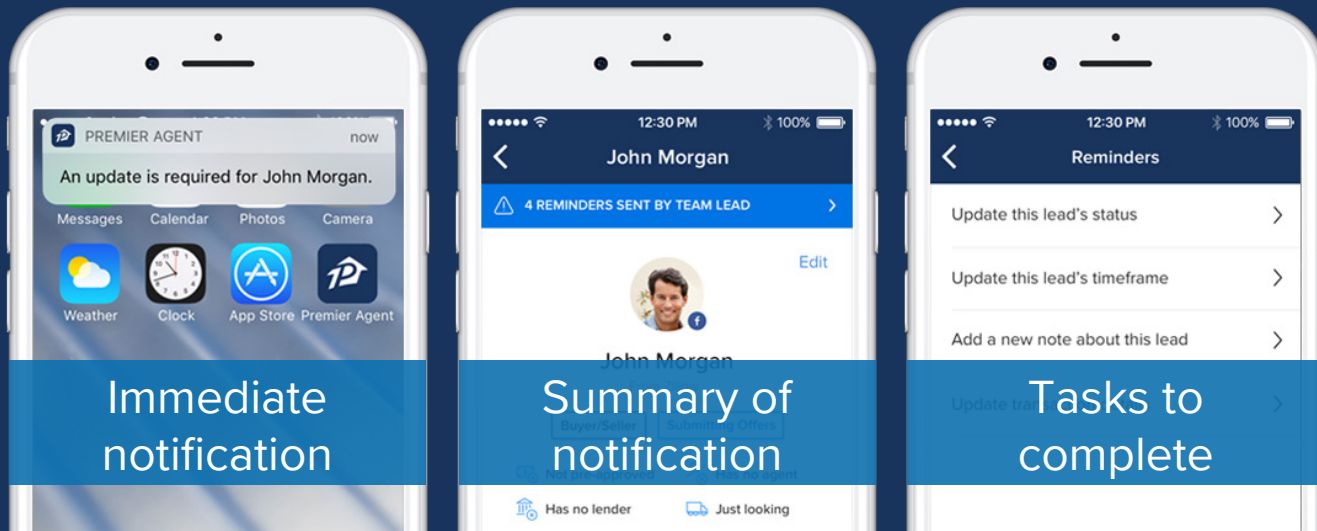
both collectively and by individual



- ✓ Most recent lead
- ✓ Total leads
- ✓ Needs follow-up

Keep your team accountable

with reminders for each member



Team members can also view and respond to reminders in their lead inbox

LEARN MORE IN THE HUB

- Visit **Support Street** to get your questions answered
- Text **69590** to set up a 1:1 appointment
- Explore **A Buyer's Journey Home** to understand how these products fit into the buyer experience
- Stop by the **Product Feedback** kiosk to share your suggestions
- Purchase more advertising in the **Central Business District**

