

## FOLLOW-UP PLANS

**WHAT:** Follow-up Plans are reminders to stay in touch with clients based on your or your company's timeframe and methods. They help you focus your time & attention by identifying the Contacts who are the most important for you to touch base with, or by sending out communications automatically for you.



### Emails

Send emails using scripts created specifically for USAA leads.



### Notes

Track any communication you've had that doesn't fit into one of the phone call, email or text message categories.



### Phone Calls

Use pre-defined call scripts that you can change on the fly.

**HOW:** From the Contact Profile page, scroll down to Campaigns. Click the +Add a Follow-up Plan. Use filters to find the right USAA plan for your Contact. Click Select to add the plan.

### Q. Where can I see the next touchpoint for a Contact?

A. When a Contact is due for a touchpoint, you'll find them under the Updates Due or Reminders sections of the dashboard. Note: if they are due for an automated email, that email will go out on its own—the Contact will not show up on your Dashboard.

DATE DUE	CONTACT	ZAPSCORE	STATUS	ACTIONS
05/17/18	Zap_20180516032225 Test	None	Almost Out of Compliance	Make a Call, Send an Email, Add a Note, Already done
05/18/18	Zap_20180517012416 Test	None	Out of Compliance	
05/18/18	Zap_20180517012426 Test	None	Out of Compliance	

### Q. Are any steps in the USAA Follow-up Plans automated?

A. Yes. Some of the USAA Follow-up Plans do have automated emails as a touchpoint step to make it easy for you to stay in touch with your contacts.

### Q. How do I find leads who don't have a plan assigned?

A. Using filters on the Contact page, search for USAA leads and use the Follow-up Plans filter to sort by leads not assigned a plan. Then go through the list and use the +Add a Follow-up Plan to assign a plan.

Contact Details		Campaigns & Follow-ups	
Status	Any	Follow-up Plans	Not assigned
Client Type	Any	New Listing Alerts	Any
Phone/Email	Any	Watched Homes	Any
Lead Type	Any	Saved Homes	Any
LR Source	USAA List - LR		

### Q. I thought putting leads on a plan would keep me up to date. Now it's saying I need to update leads. Why?

A. Putting a lead on a Follow-up Plan counts as an update, but you need to continue to move the plan along. If the dates between touchpoints match your reporting intervals, and you do the steps, it should keep you up to date!

## NEW LISTING ALERTS

**WHAT:** 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 their USAA account 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!

**WHY:** New Listing Alerts are the most opened and read automated drip marketing emails you can send in Zap, and are super powerful marketing tools.

**HOW:** To turn on New Listing Alerts, sign in as your contact, search for properties using the search criteria they have given you, click the Recommend Search button, then click Email this Recommendation.



### How do you know which New Listing Alerts you've set up?

For New Listing Alerts you've set up, you will see the agent banner at the top of the alerts. Those without a banner are alerts consumers have set up themselves.



### Q. Why do I want to set up listing alerts on Zap instead of my MLS?

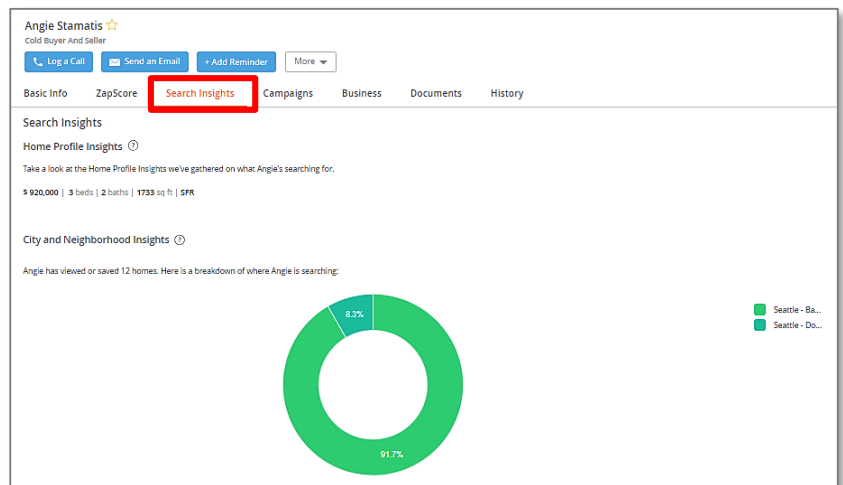
A. If you set up New Listing Alerts on Zap, you can see if your client views homes, saves searches or creates searches themselves.

- Opened an email
- Viewed a home detail page
- Viewed your Agent Website
- Logged into a mobile app

Zap's New Listing Alerts are much easier for consumers to change, update or create than most MLS portal software. Consumers can create a much broader search in Zap, so they get a good number of alerts instead of just a few.

### Q. What should I do first before setting up Listing Alerts?

A. From the Contact Profile page, view Search Insights to see what your contact has been looking at. Then set up searches that will help your contact continue their search for the perfect home!



### Q. How often are New Listing Alerts sent?

A. If there are any new properties that fit your Contact's search criteria, New Listing Alerts are sent minutes after the listing has been added.

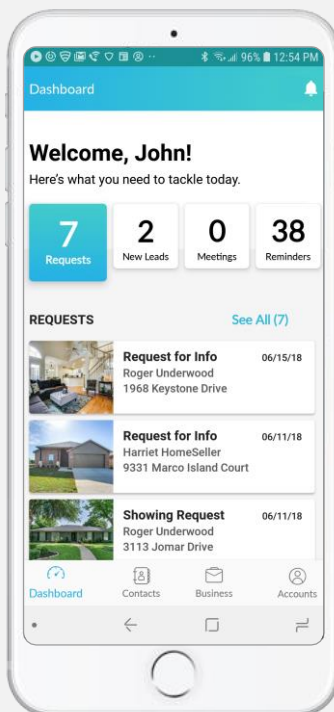
## ABOUT MOBILE CRM

**WHAT:** The Mobile CRM is your 'on the go' Zap system. With it you can

- Add Contacts
- Update USAA Broker Leads
- Add Property Insights
- Text your Contacts
- Add Local Insights
- Move Follow-up Plans Along
- Complete Showings
- Add Tasks
- Complete Listing Appointments
- Respond to Requests for Info
- Review Lead Notifications
- View Contact Profile Pages
- View Contact History
- Send Emails
- Use Phone Scripts
- Log a Call
- Add a Note
- Add a Profile Note
- Change the Relationship

And just about everything you can do on the desktop version, with the exception of updating account settings.

There is no cost for this app, and it's updated frequently with new features.



### Q. How do I log into the Mobile CRM?

A. You use the same login as you use for the Desktop version and the same login you use to get into your brand portal.

### Q. What phones does the app work with?

A. The app works with either Android or iPhone smart phones with a recent update to the phone's operating system.

### Q. How often is the app updated? Will I get a notice?

A. It is updated typically at least once a month. You may not get a notification on your phone, but if you view the app store page for the app, it will indicate if there is an update. You should check the app store frequently for updates.

### Q. When I add a contact or update information how long before it shows on the Desktop version?

A. Because the phone is using the 'cloud' to store your contacts, as long as your phone is connected to the Internet, the updates should be immediate. If you are not seeing updates, make sure your phone is not on Airplane mode or and is connected to the Internet.

### Q. What can I not do on the Mobile CRM?

A. You cannot change any account settings. That needs to be performed on the Desktop version of Zap.

**Fastest way to add Property Insights!**

**Texting counts as an update to leads.**

**Move follow-up plans along!**

## ABOUT CONTACTS

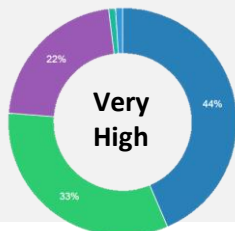
**WHAT:** Contacts are those USAA leads you receive from your broker. The Contact Profile page keeps track of everything your contact does, and all updates and communication you have with that contact.

### ZAP MAKES RESEARCHING EASY!

There are **three features** in the Contact Profile page that make researching a Contact quick and easy:

#### 1. ZapScore<sup>SM</sup>

ZapScore shows you what the contact is doing on Zap, including if they are using the mobile app. If you have more than 100 ACTIVE contacts, you will have a score, otherwise the score is a range.



- Opened an email
- Logged onto website
- Requested Info
- Subscribed to Watch Home Updates
- Viewed your Agent Website



#### 2. Tags

The contact tags tell you instantly what kind of relationship you have, be it a buyer or seller, etc. The tags change based on what the contact does, or how long they are on Zap. Add your own custom tags too!

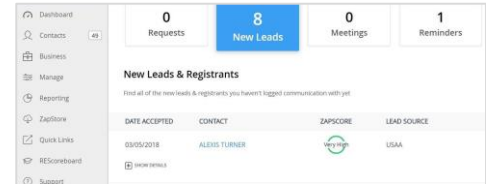
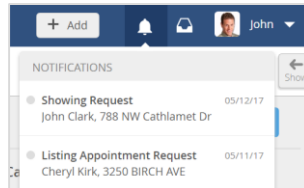
#### 3. Search Insights

These provide a collective insight into what type and price range the Contact has searched for.



### Q. Where do I find new USAA leads?

- A. There are three places:
  1. Under the Bell icon (Zap Notifications)
  2. In the New Leads box on the dashboard
  3. By using FILTERS, and filtering by LR Source

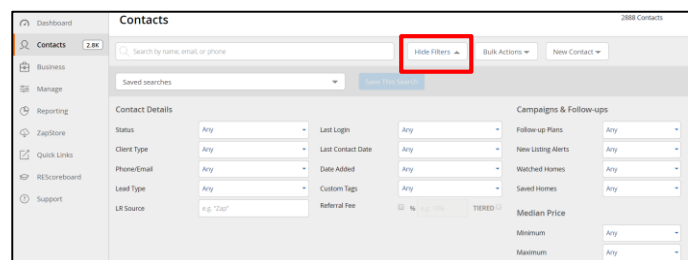


### Q. How do I know if the lead is a USAA lead?

- A. The tags underneath each contact's name shows what kind of contact it is and its characteristics. Type in your own tags to help you describe your contact then click the blue Add button.

### Q. How can I find a list of contacts who are not on follow-up plans or might have logged in recently to Zap?

- A. You can use the Contacts FILTER option to find just about any type of contact. Click on the CONTACTS link, then click the FILTER button to see what filter options are available. You can even find contacts currently signed into Zap!



### Q. What do you recommend I do with new leads?

- A. Put them on a specific USAA follow-up plan. Then check the Contact the next day to see if they are searching for properties. If so, set them up on listing alerts for the types of properties in which they show an interest.

## ABOUT ZAP

Zap is a CRM (Customer-Relationship Management) tool that is an end-to-end software solution you can use for

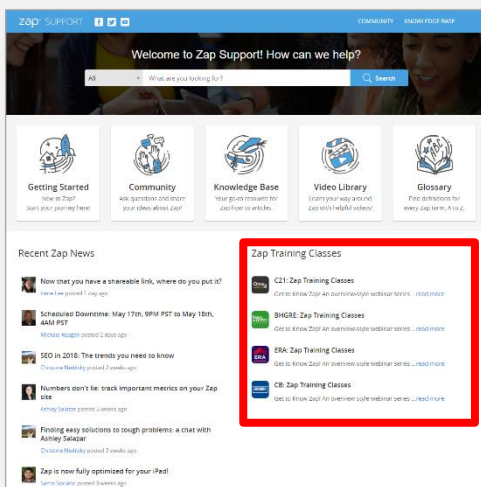
- Lead generation
- Marketing and Web site hosting
- Incubating prospects passively
- Communicating with clients
- Recording insights on homes
- Predicting which prospects are starting the home-buying process

## AVAILABLE TRAINING

There are several training series available to Zap users:

- **Get to Know Zap!**
- **Get Zapped! for Agents**
- **Get Zapped! for Managers**

To access the links to the available Zap Training Classes, refer to the [Zap Support](#) Home page.

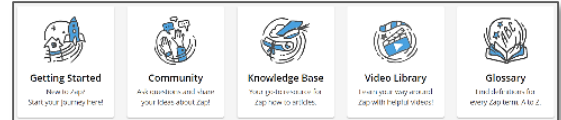


## Q. What resources are available for learning about Zap?

A. There are several resources available for learning about Zap and how it can help you build your business.

## 1 Zap Support

**Zap Support** is accessed from within Zap, and includes several resource options:



- **Getting Started** is intended for new Zap users, and includes short videos and articles on a variety of topics.
- The **Community** is an interactive space in which you can share ideas, ask questions, and get help from other users.
- The **Knowledge Base** houses numerous how-to articles and videos on specific Zap features.
- The **Video Library** includes all available Zap videos, and is a great way to learn your way around Zap.
- The **Glossary** includes definitions for every Zap term, A to Z.

### COMMUNITY TOPICS

- My Account
- Contacts & Follow-ups
- Requests & Tasks
- Zap Website & Apps
- Broker Features
- Zap Specialist Center
- Zap CRM Mobile App
- Zap Elite
- Brand Ambassadors
- Real Estate Talk
- Team USAA**
- Zap Suggestions
- Zap News

**Zap Support** also includes a separate area just for agents working with USAA clients. The **Team USAA** Community and Knowledge Base is designed for the special needs of agents handling home purchases for military personnel.

## 2 Other Resources

Other available resources to learn about Zap include the following:

- Zap has a **Social Media** presence on [Facebook](#), [Twitter](#), [Vimeo](#), and [YouTube](#), where you can access even more great info.
- Your **Zap Specialist** stays informed of new features and can help you learn Zap, assist with Zap issues, and report company issues.
- **ZapTV** is a live broadcast, brought to you by the Zap Squad! Each month's session is centered around a different Zap learning topic, with featured guest speakers, interactive activities, and opportunities to get your critical Zap questions answered.

