



LION DESK

*The New Home of The Thorn Collection
Part II*

LION DESK

THE NEW HOME OF THE THORN COLLECTION

Start of Day 2: Lion Desk App Installation

Section One: Using The Lion Desk App

Section Two: Plans and Campaigns

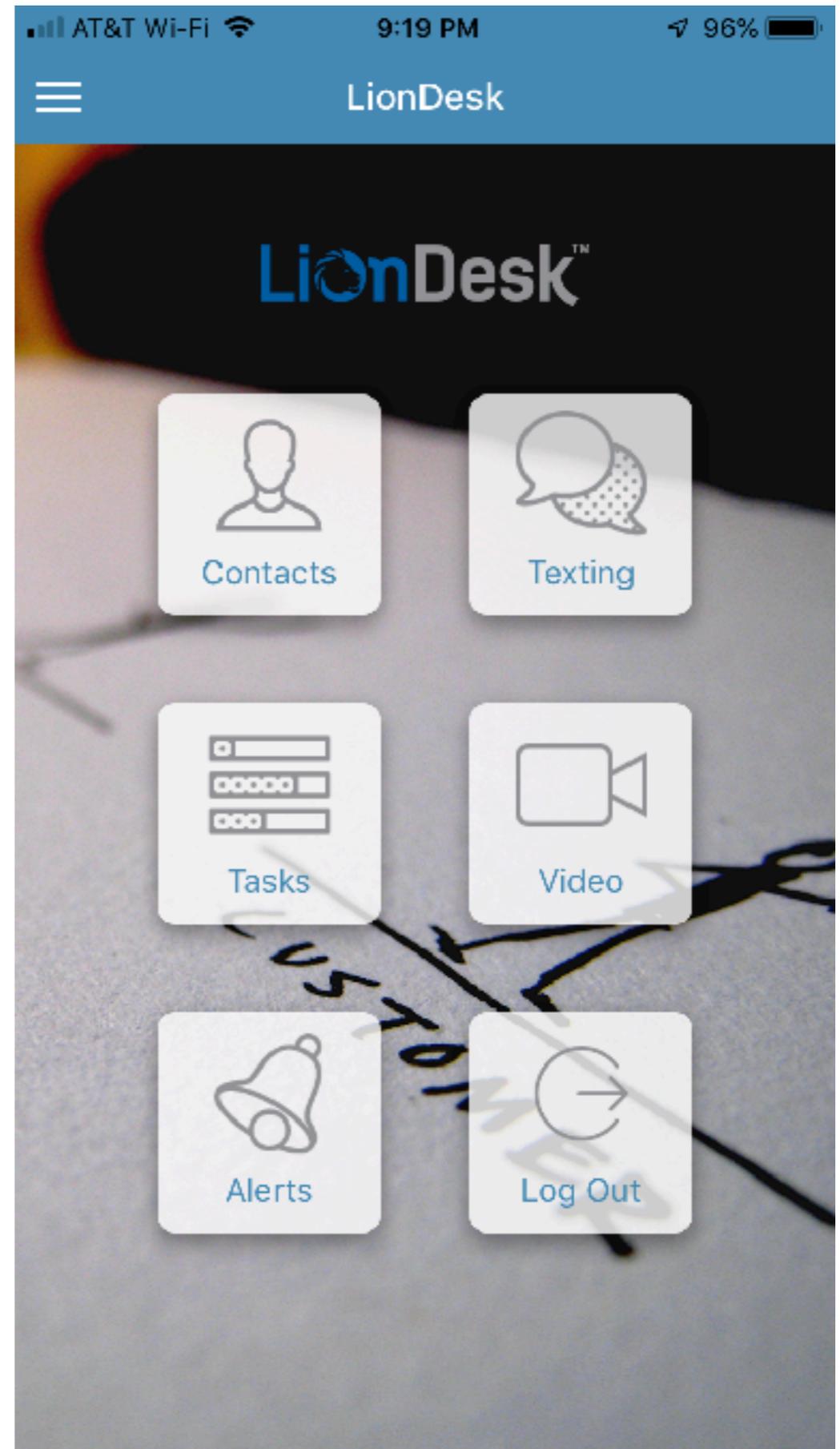
SECTION ONE

Lion Desk App

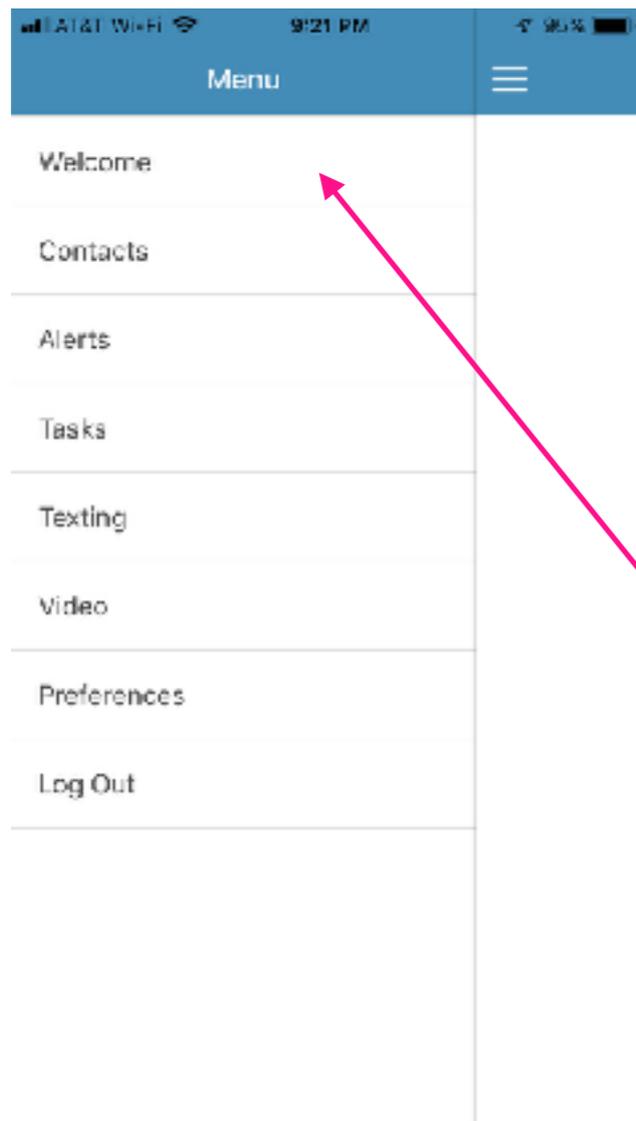
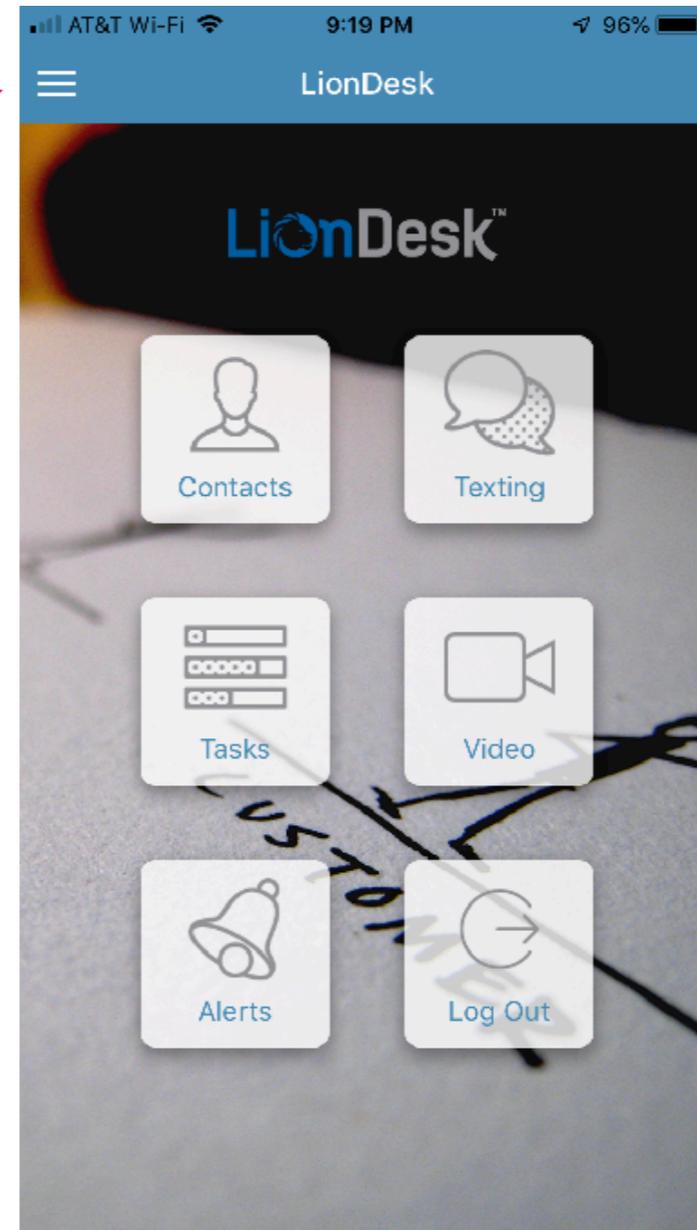


Welcome Screen!

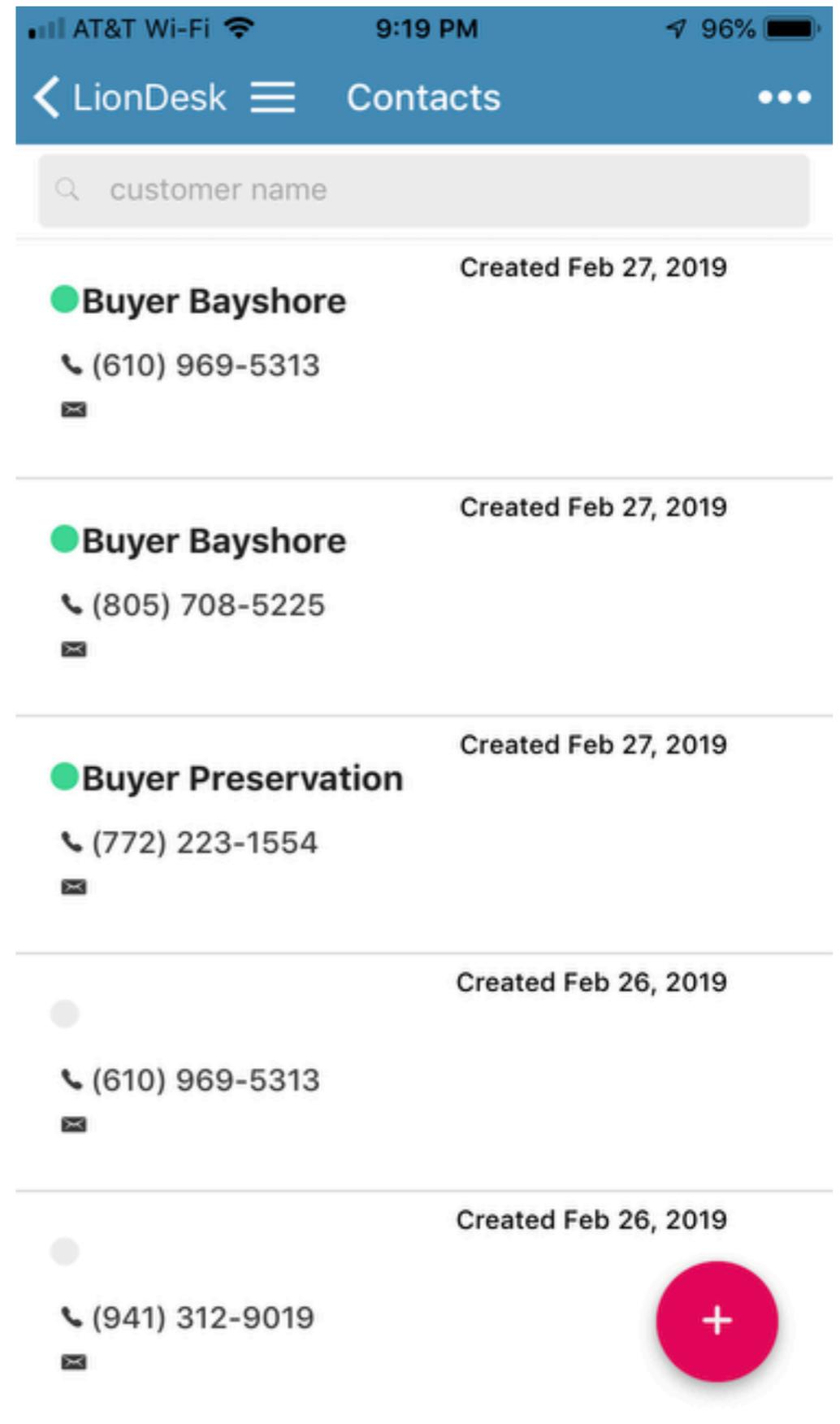
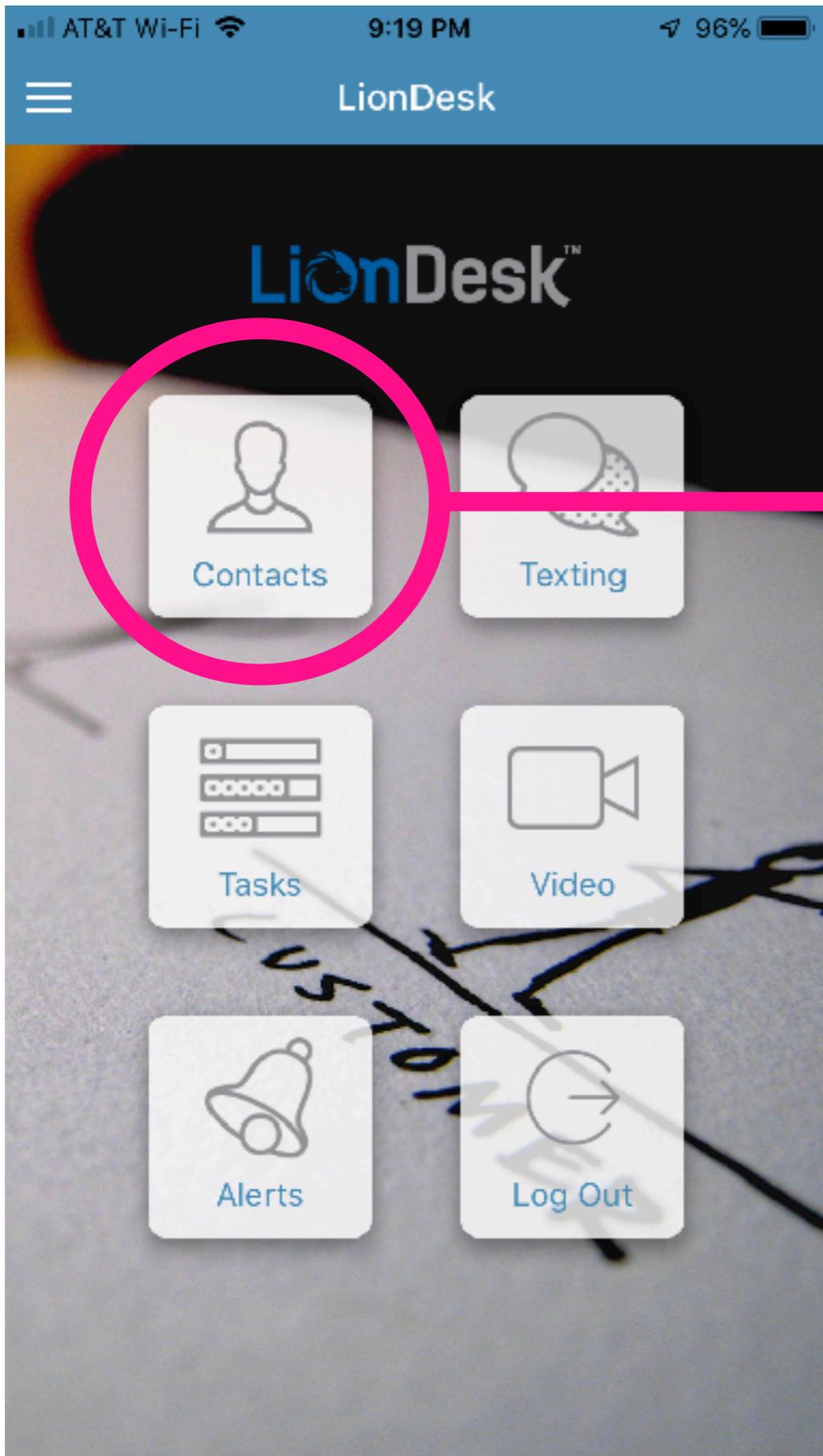
- *Contacts*
- *Tasks*
- *Alerts*



If you tap on the three lines located in the top left corner of the app....

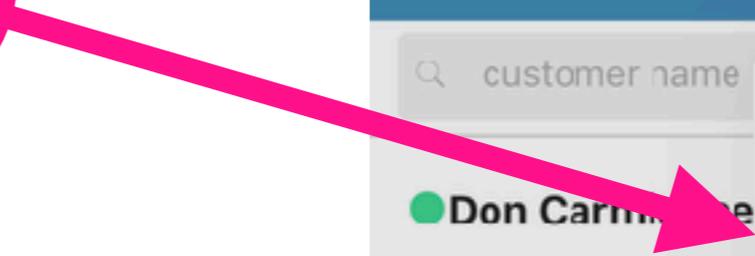
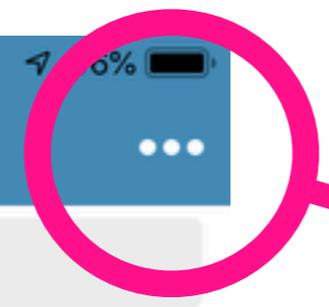


The menu will appear which shows you different places that you can go within the app. To return to the home screen tap on “Welcome”.



customer name

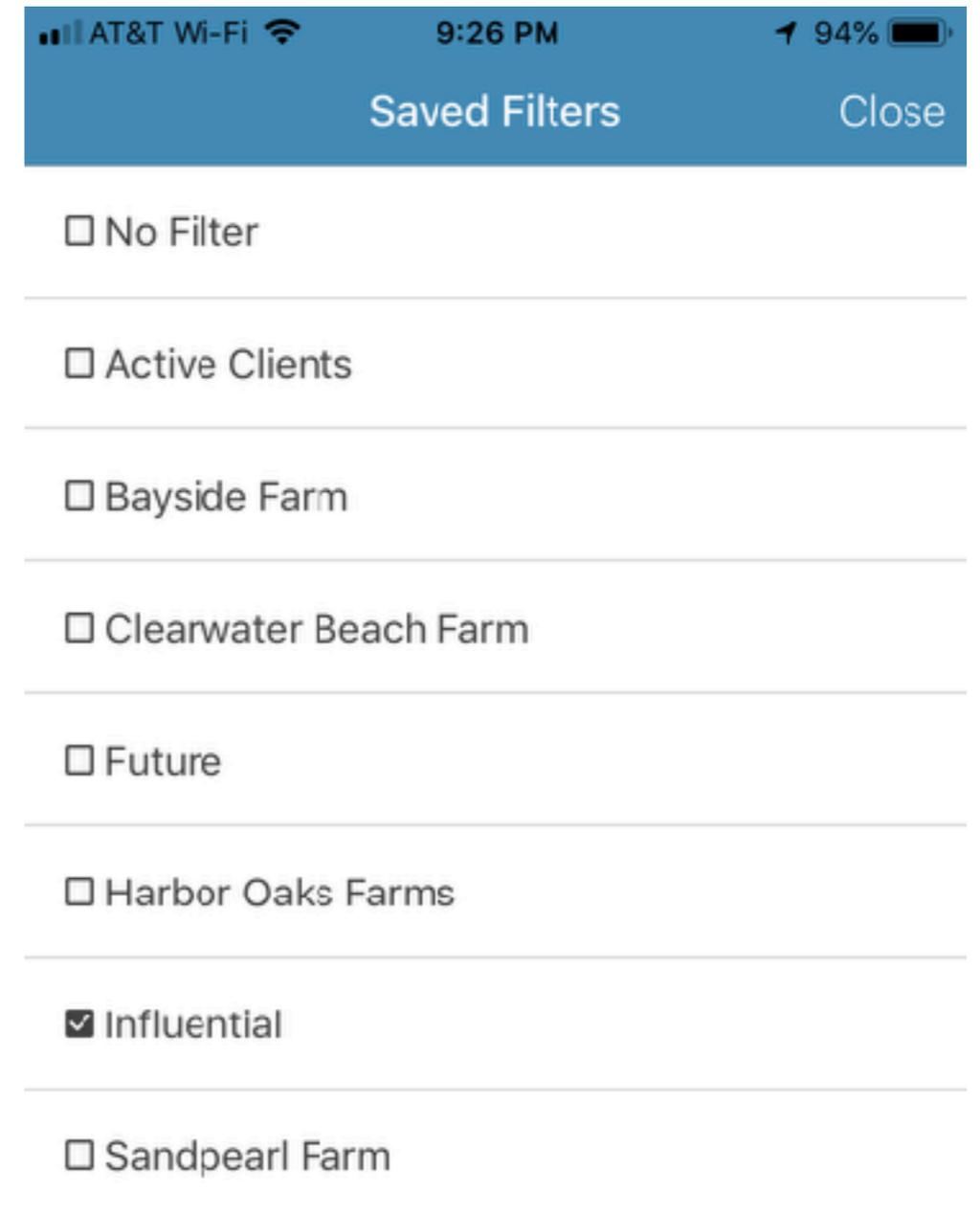
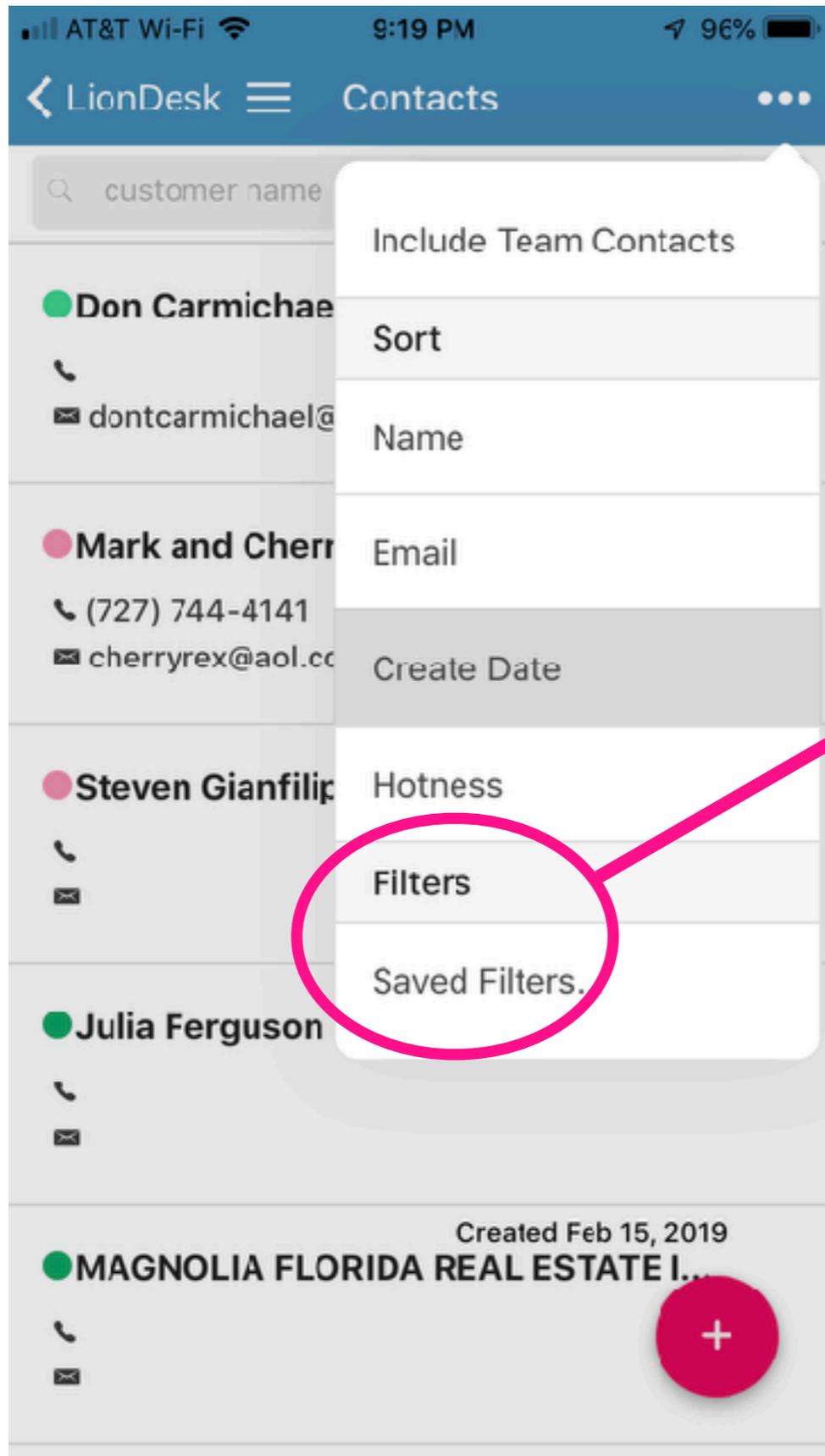
- Created Feb 27, 2019
Buyer Bayshore
(610) 969-5313
- Created Feb 27, 2019
Buyer Bayshore
(805) 708-5225
- Created Feb 27, 2019
Buyer Preservation
(772) 223-1554
- Created Feb 26, 2019
(610) 969-5313
- Created Feb 26, 2019
(941) 312-9019



customer name

- Include Team Contacts
 - Sort**
 - Name
 - Email
 - Create Date
 - Hotness
 - Filters
 - Saved Filters...
- Created Feb 15, 2019
MAGNOLIA FLORIDA REAL ESTATE I...





No Filter

Active Clients

Bayside Farm

Clearwater Beach Farm

Future

Harbor Oaks Farms

Influential

Sandpearl Farm

customer name

Created Jan 10, 2018

Joseph J Zucchero

(727) 644-9706

RAIDERZGUY@GMAIL.COM

Created Nov 20, 2017

Tom Wirth

(540) 226-8313

teexxjay@aol.com

Created Nov 20, 2017

Wendy Wirth

(703) 727-3993

wendywirth75@gmail.com

Created Sep 30, 2018

Greg Winteregg

(727) 560-3588

winteregg@aol.com

Created Sep 30, 2018

Becky Wills

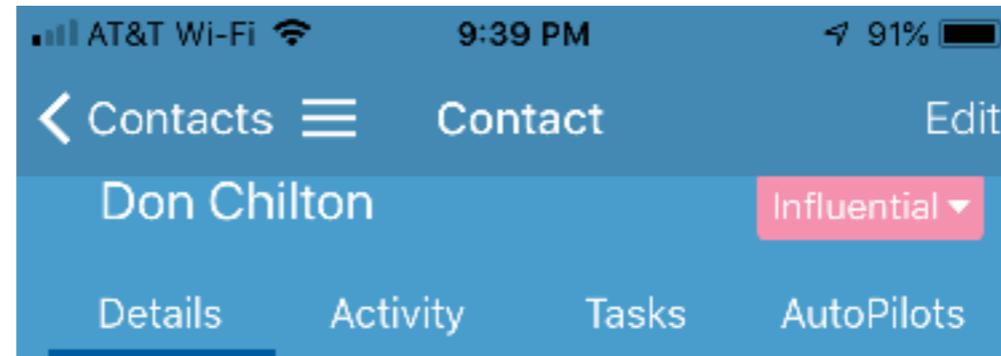
(727) 698-4343

becky@weijax.net



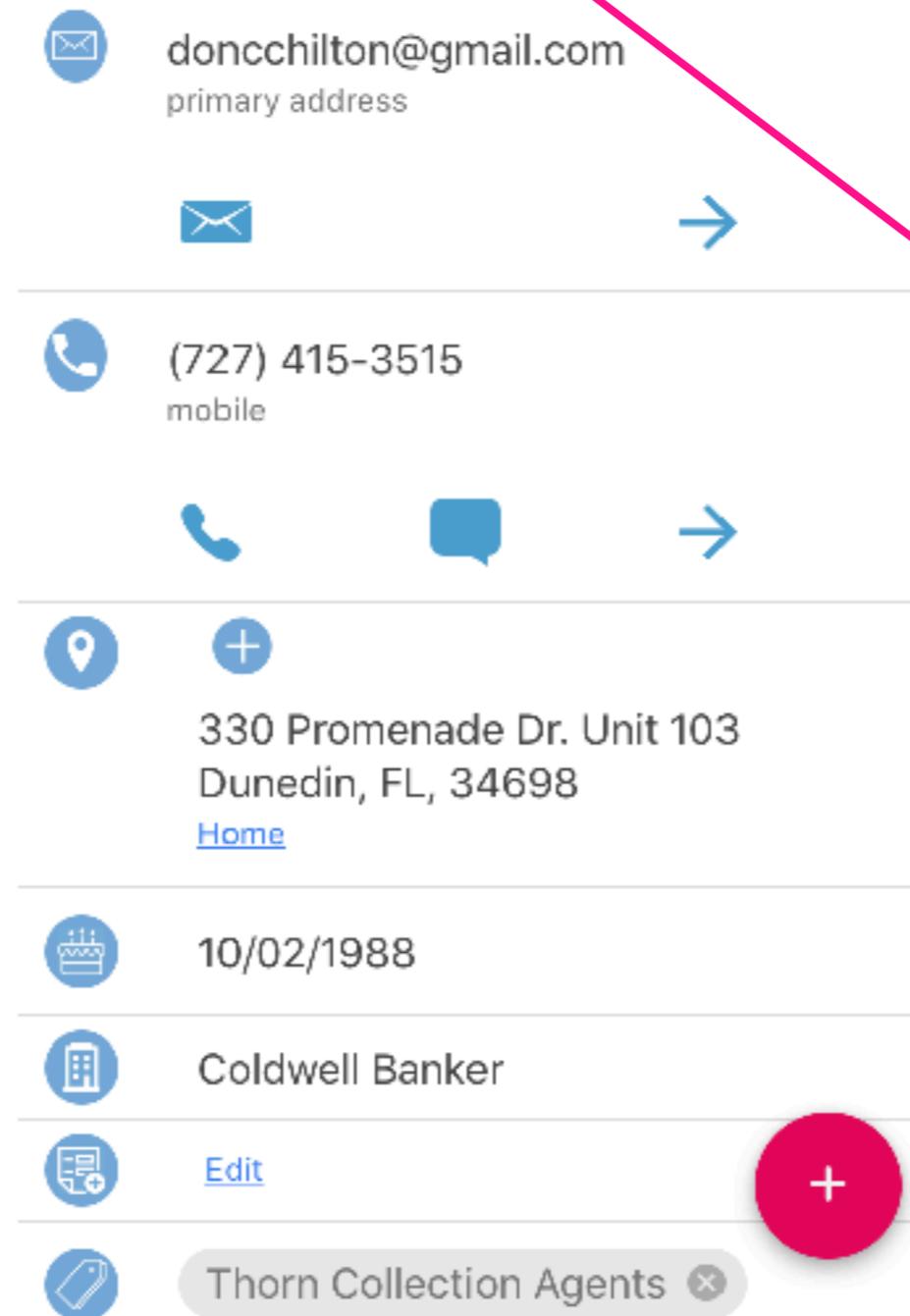
Remember the color codes
for our "Hotness" levels.
Pink = Influential

When you tap on a contact it will open the contact profile.

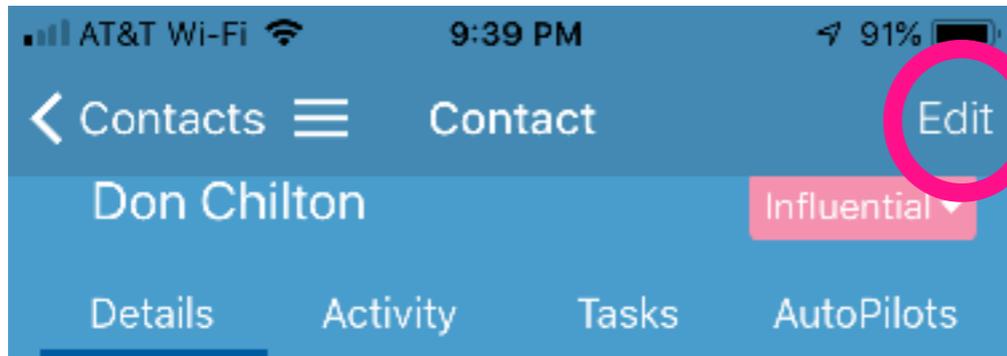


Hotness Level appears top right.

All contact information appears in the body of the contact.



There is a navigation bar at the top of the contact to access different areas of the contact.



doncchilton@gmail.com
primary address

(727) 415-3515
mobile

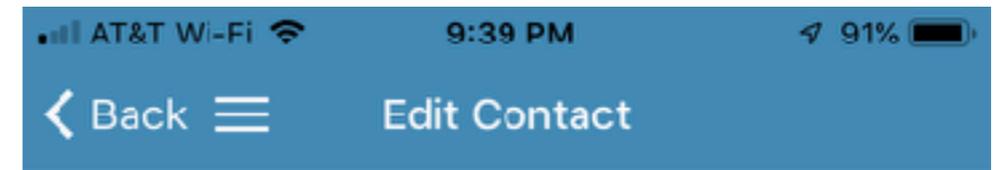
330 Promenade Dr. Unit 103
Dunedin, FL, 34698
[Home](#)

10/02/1988

Coldwell Banker

[Edit](#)

Thorn Collection Agents



First Name
Don

Last Name
Chilton

First Email
doncchilton@gmail.com

Second Email
Second Email

Mobile
7274153515

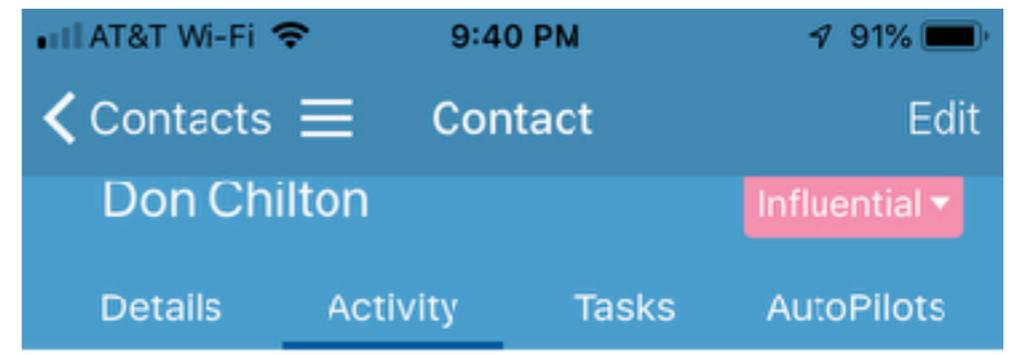
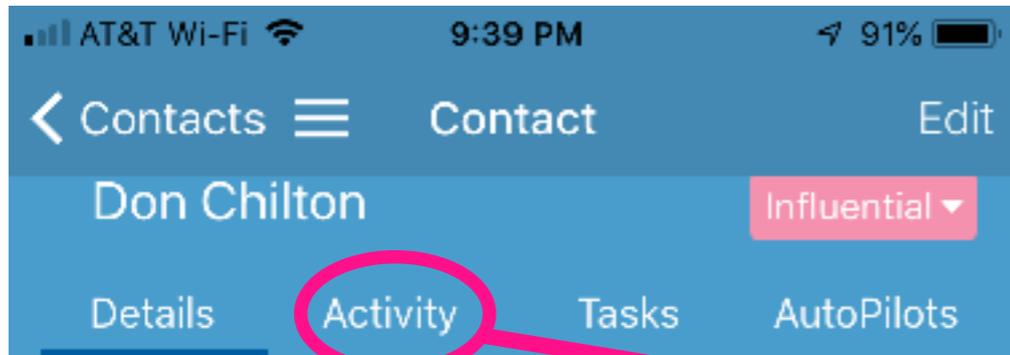
Office Phone
Office Phone

Home Phone
Home Phone

Company
Coldwell Banker

Birthday [Set](#)
10/02/1988

Anniversary [Set](#)



Activity in the app is the same as the "Contact Activity Timeline" on the computer.

- Samantha Alexandrou:**
doncchilton@gmail.com opened the email "TEST" that was sent at 02/27/2019 9:07 AM.
Feb 27, 2019
- Samantha Alexandrou:** Subject: TEST
Body: TEST EMAIL FROM LION DESK
Samantha Alexandrou | Realtor
More
Feb 27, 2019
- Martha Thorn:** Called to follow up on listing appointment.
Feb 26, 2019
- Don Chilton:** Contact owner changed to Martha Thorn
Feb 15, 2019
- Don Chilton:** Contact owner changed to Don Chilton
Feb 15, 2019

doncchilton@gmail.com
primary address

(727) 415-3515
mobile

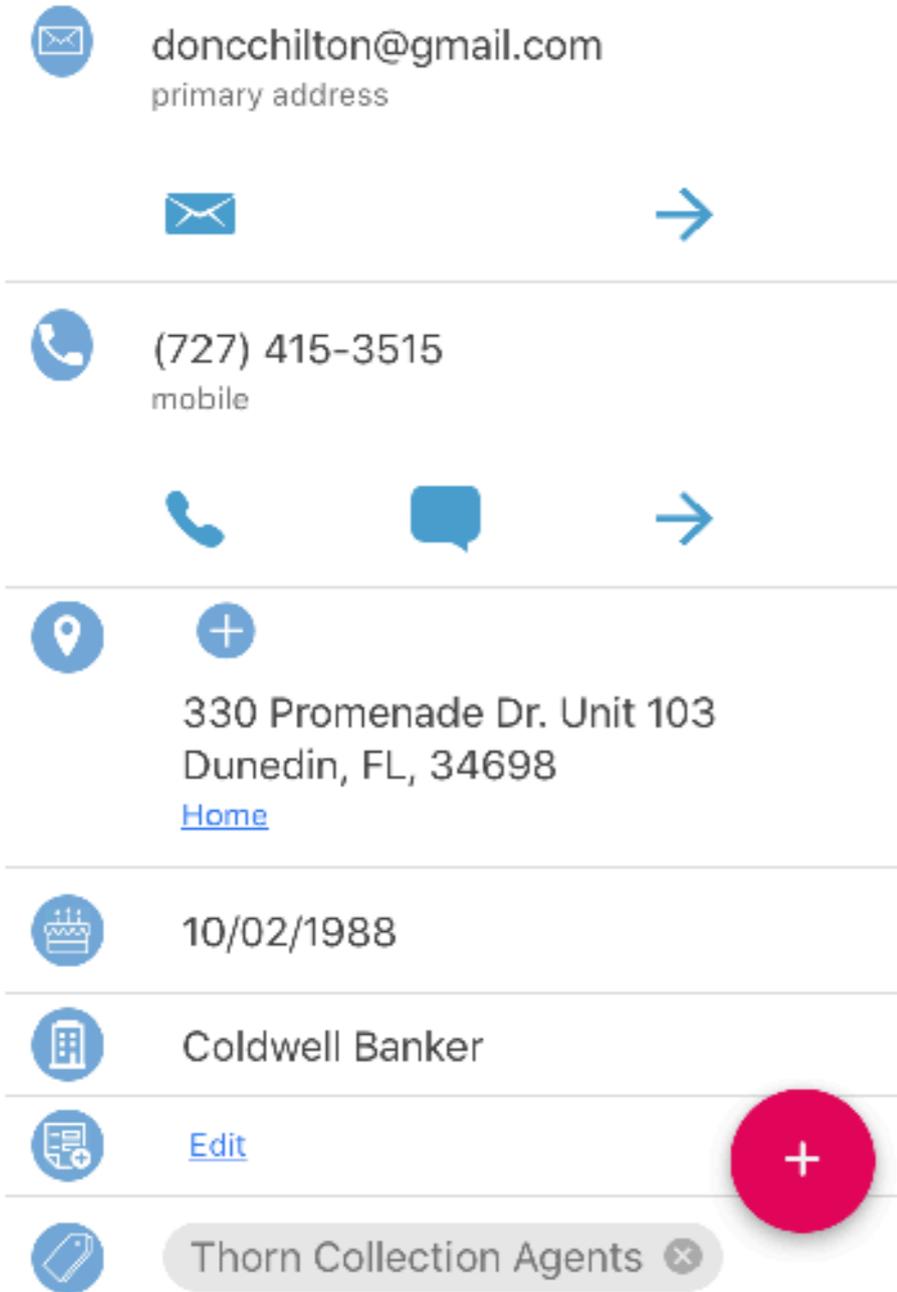
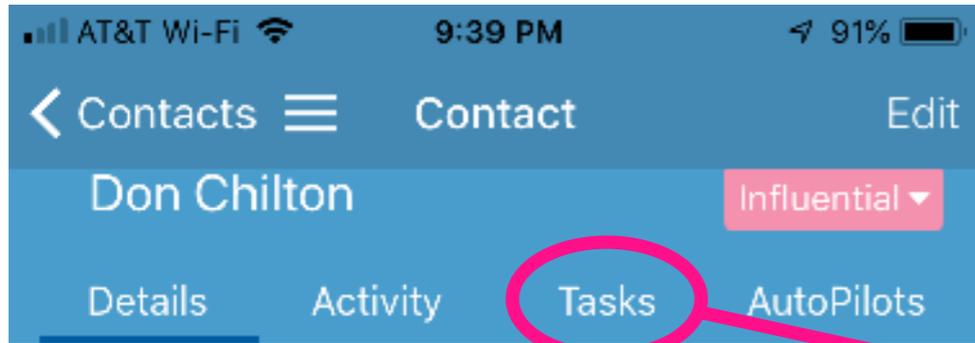
330 Promenade Dr. Unit 103
Dunedin, FL, 34698
[Home](#)

10/02/1988

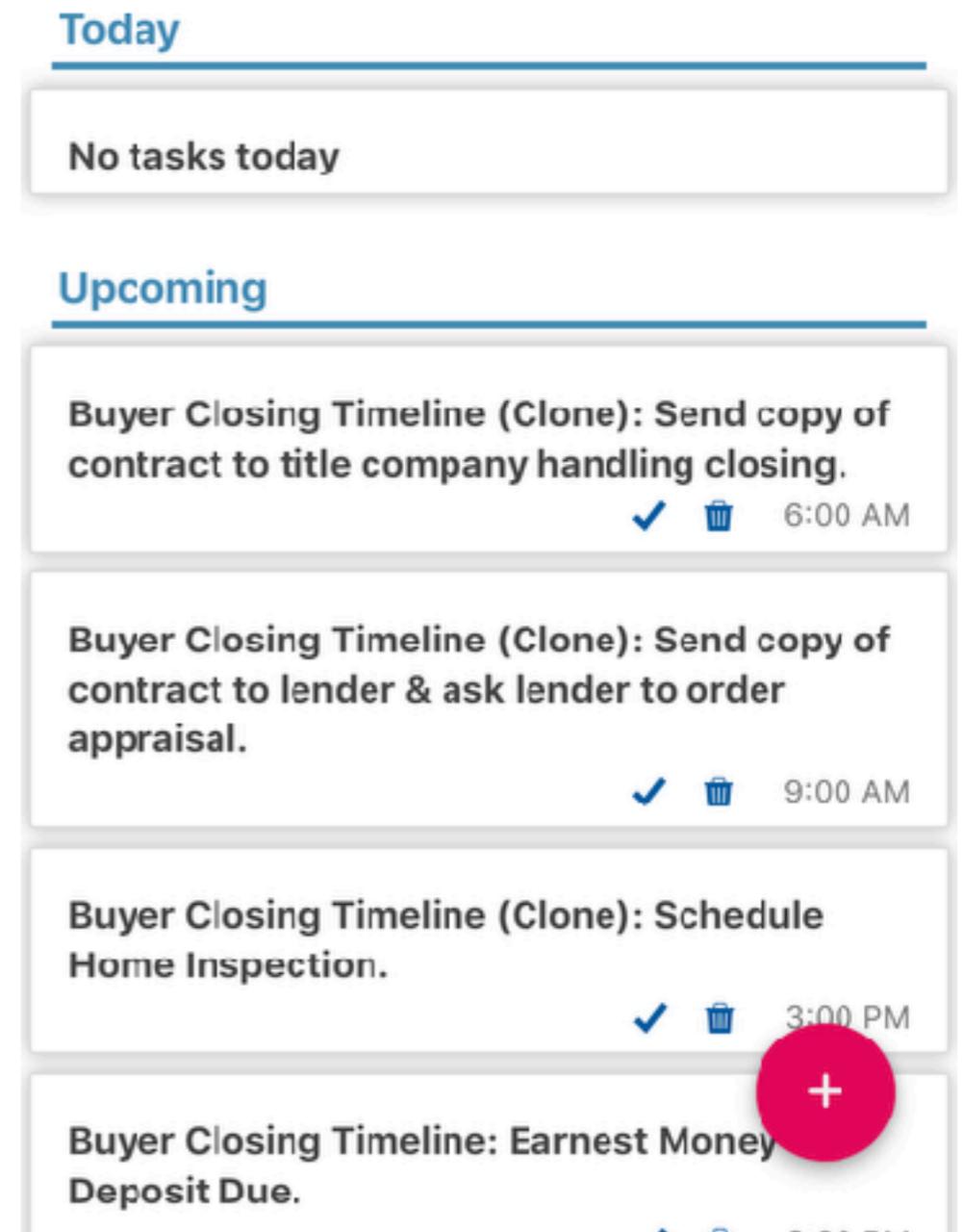
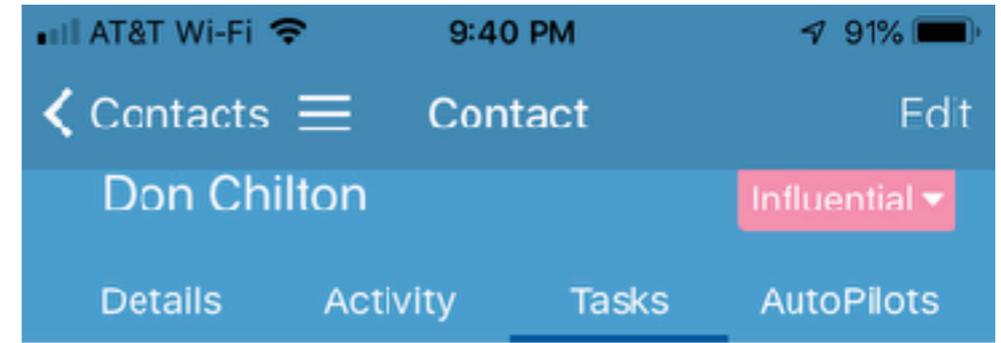
Coldwell Banker

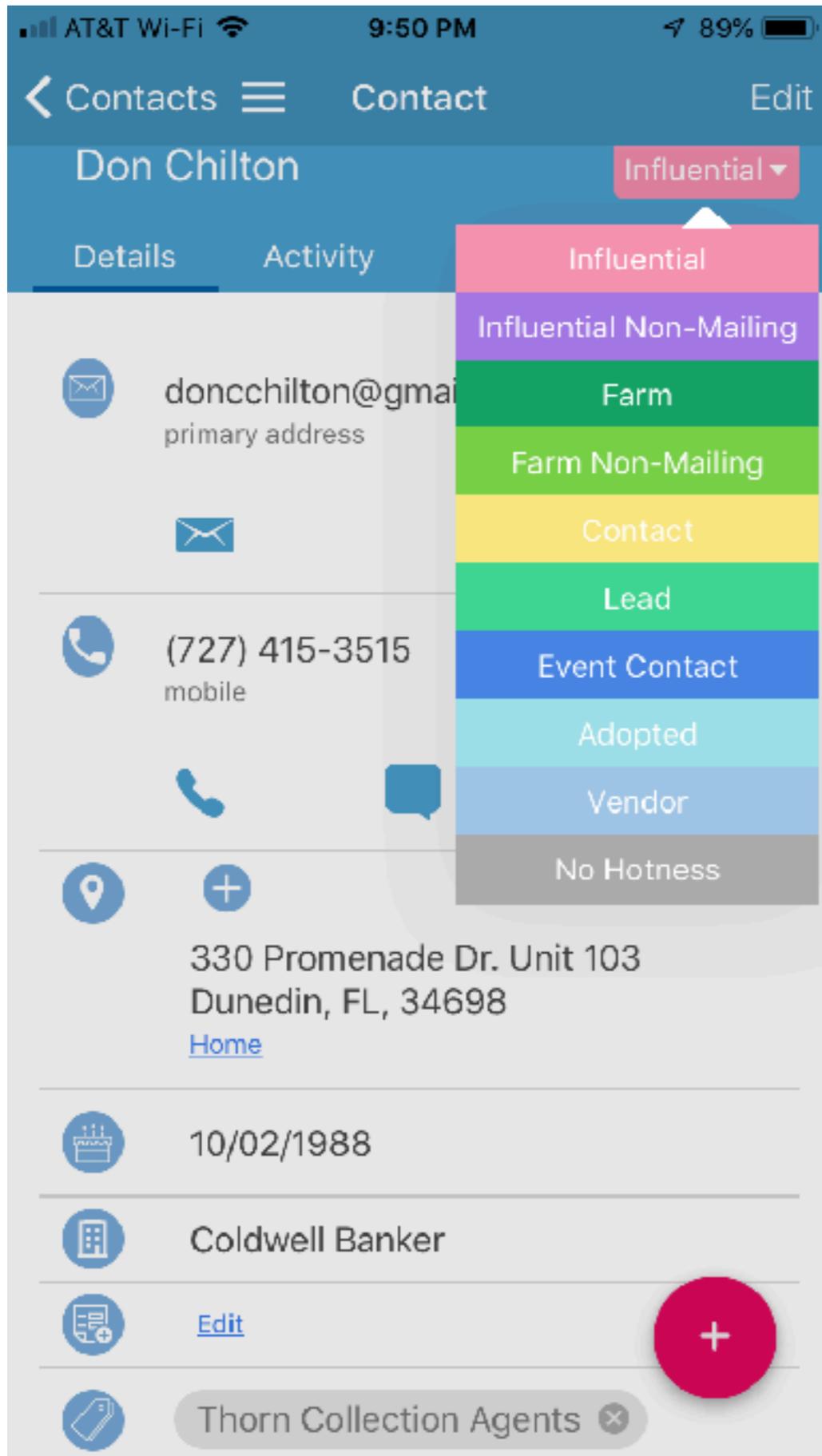
[Edit](#)

Thorn Collection Agents



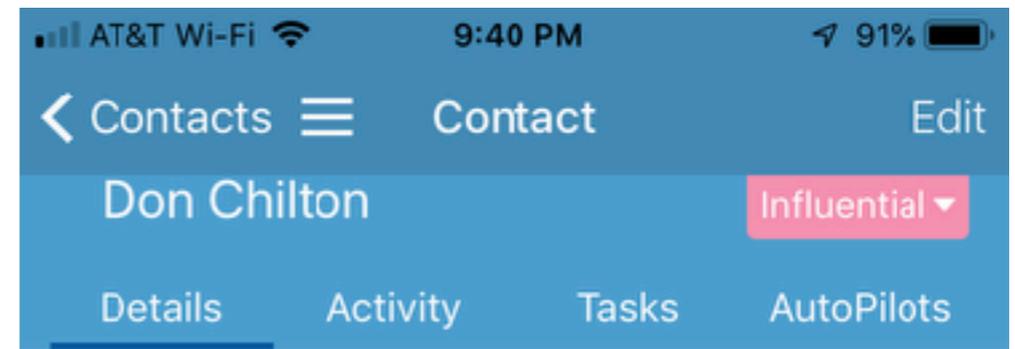
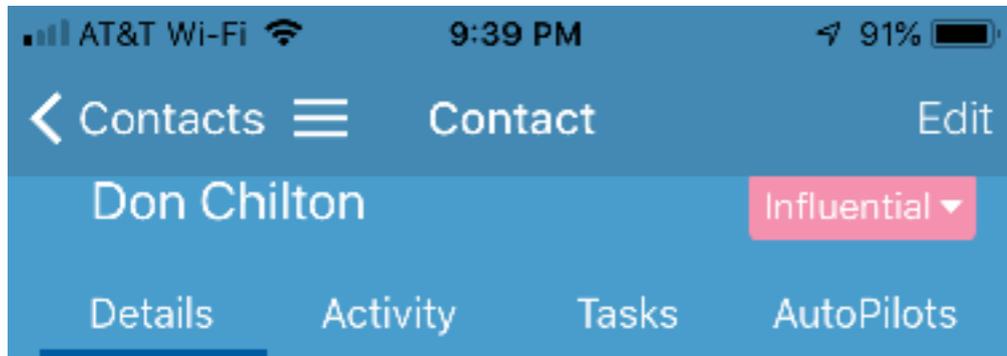
Tasks in the app is the same as the "Tasks" box on the computer.



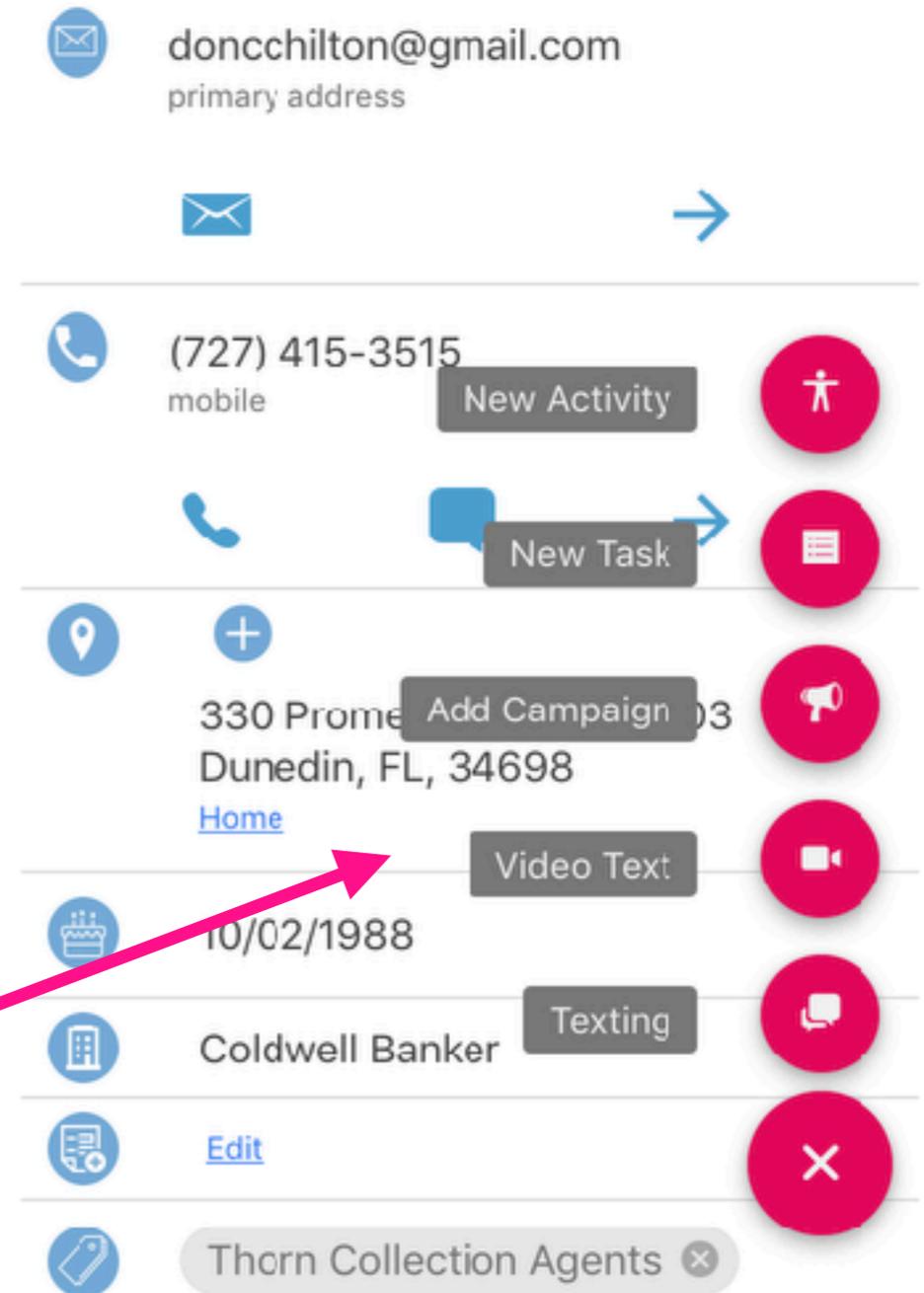
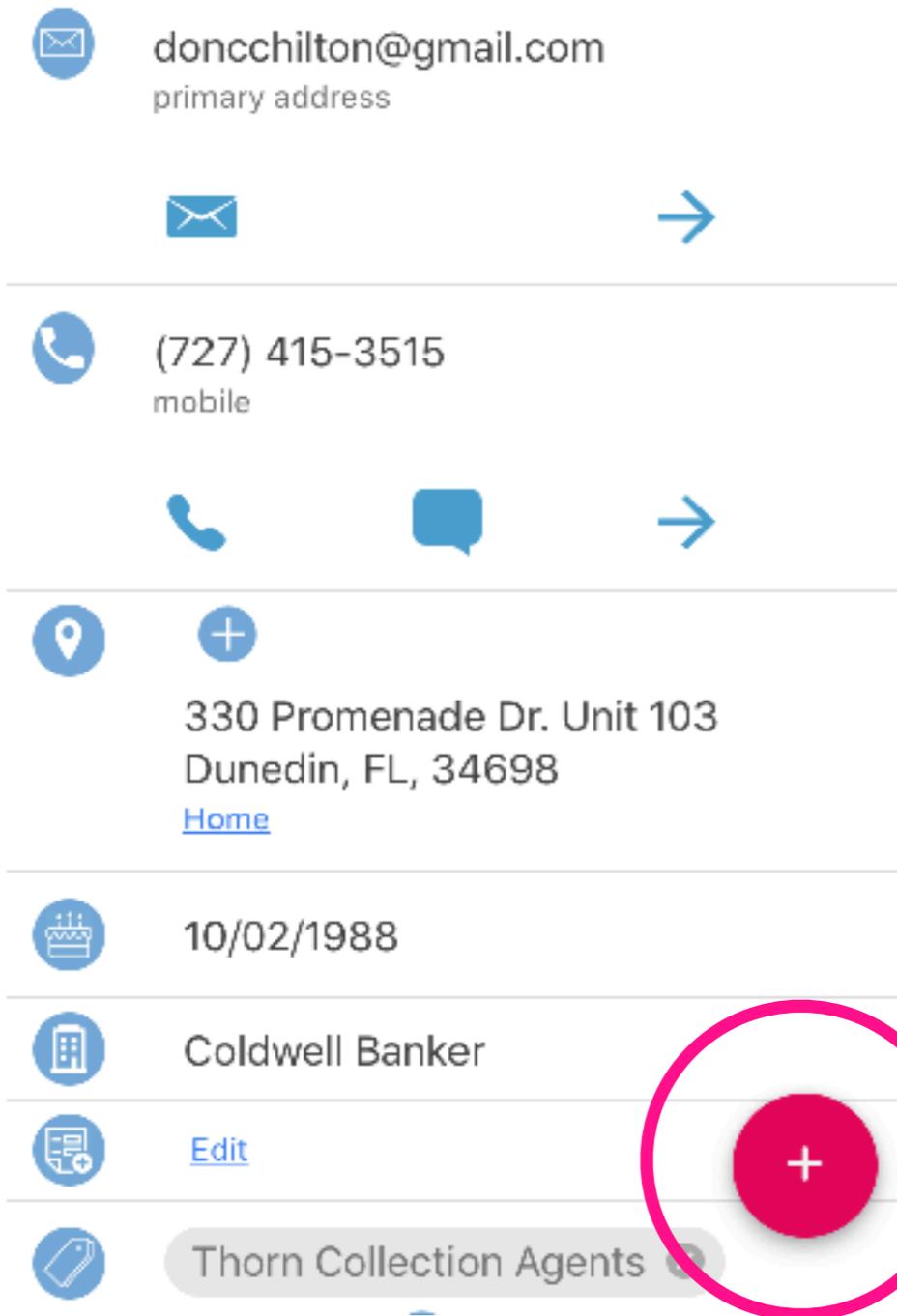


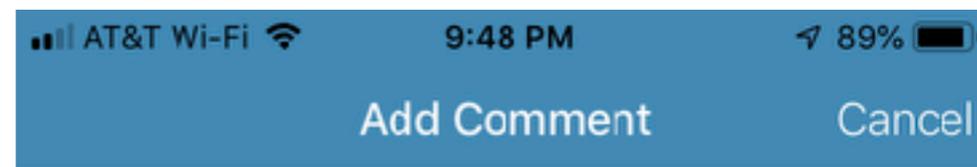
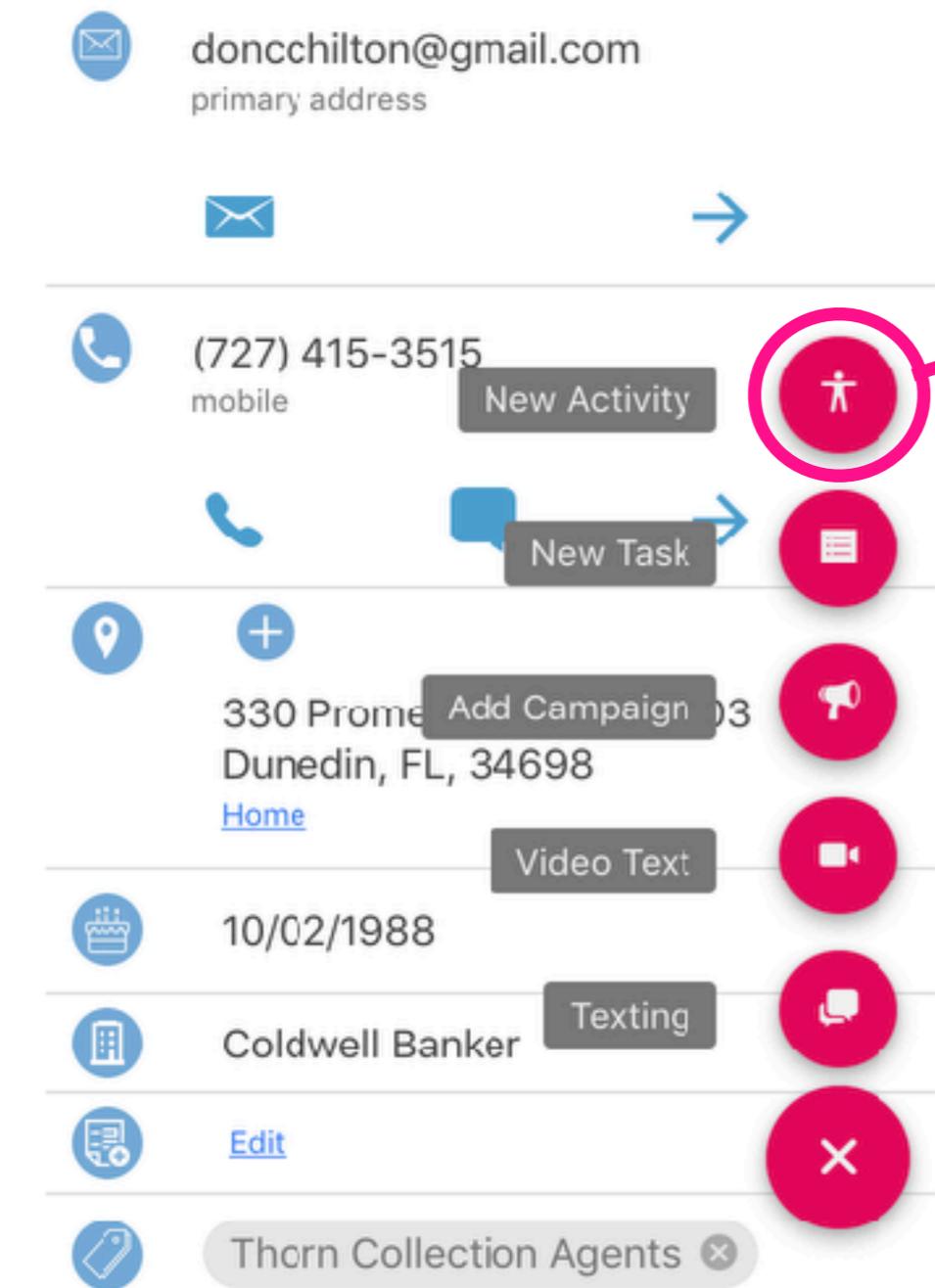
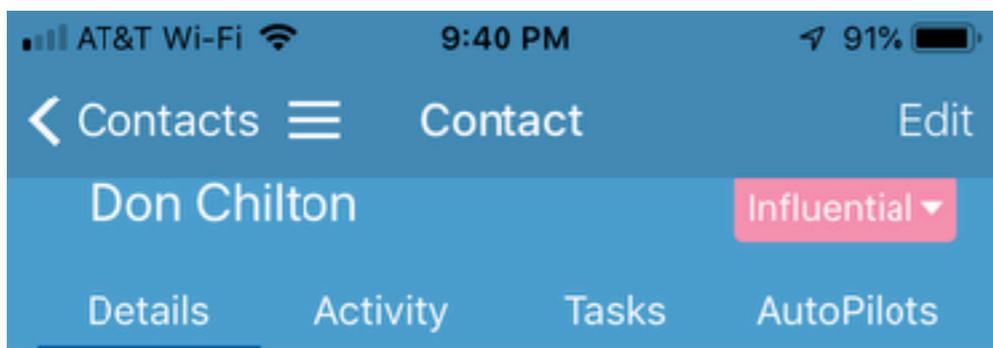
You can change a "Hotness" level by tapping the current hotness. A drop down will appear with our different choices.

Make sure that you do not select "Not Hotness". All of our contacts must have a hotness level.



To add activities or tasks to a contact, tap on the +.

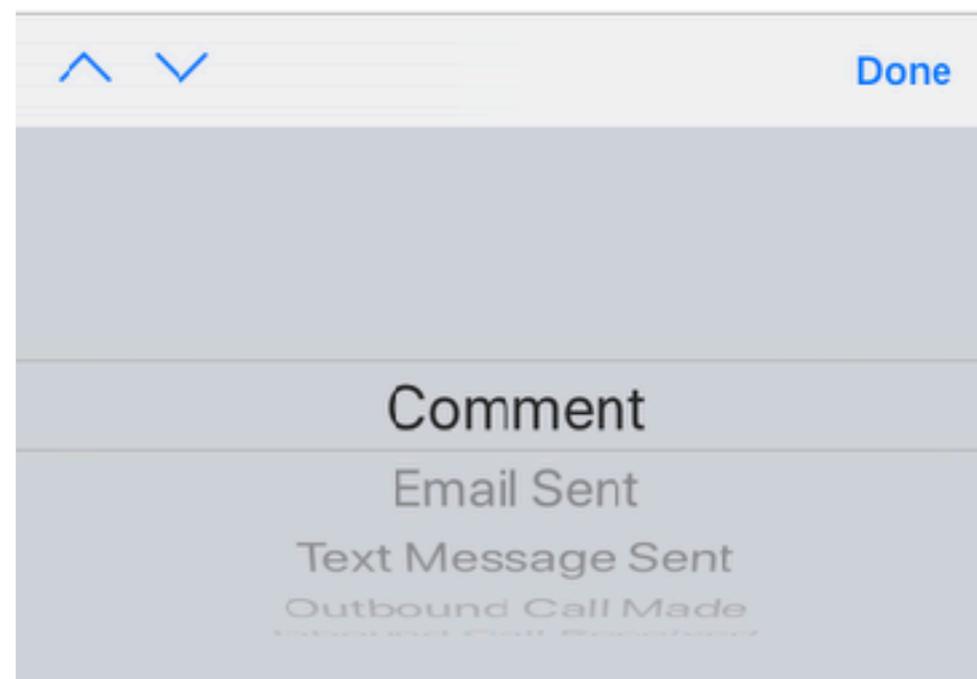




Type Ccmmnt
Comment
comment

Add

Cancel



AT&T Wi-Fi 9:40 PM 91%

Contacts Contact Edit

Don Chilton Influential

Details Activity Tasks AutoPilots

doncchilton@gmail.com
primary address

doncchilton@gmail.com →

(727) 415-3515
mobile New Activity

(727) 415-3515 New Task

330 Promenade Dunedin, FL, 34698
Home Add Campaign

10/02/1988 Video Text

Coldwell Banker Texting

Edit

Thorn Collection Agents

AT&T Wi-Fi 9:48 PM 89%

Back Add Task

Category

Description
description

Notes
note

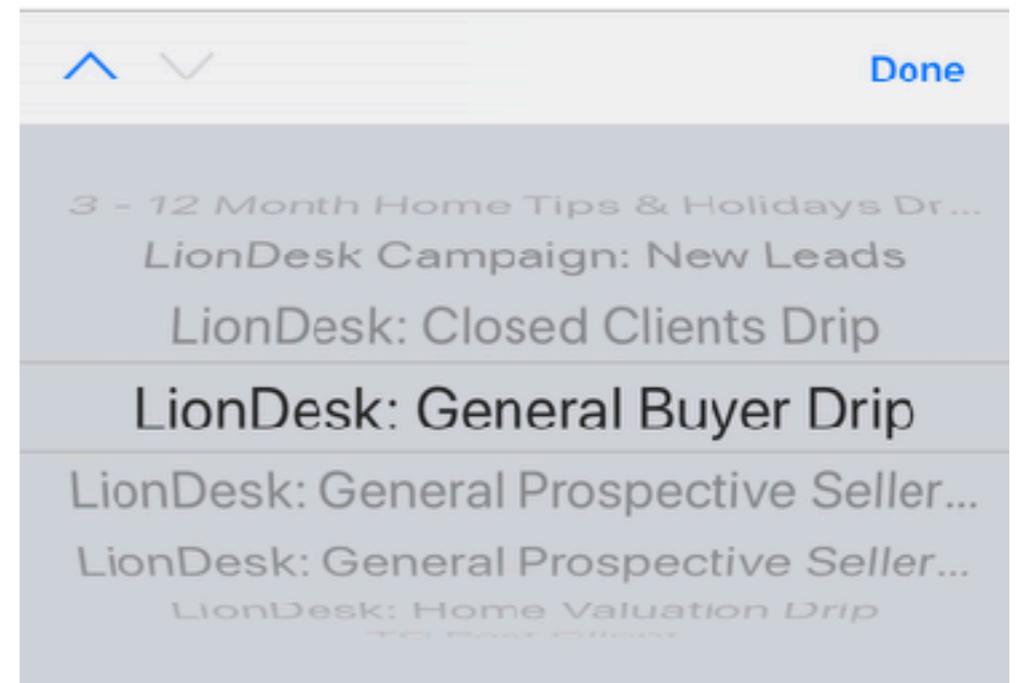
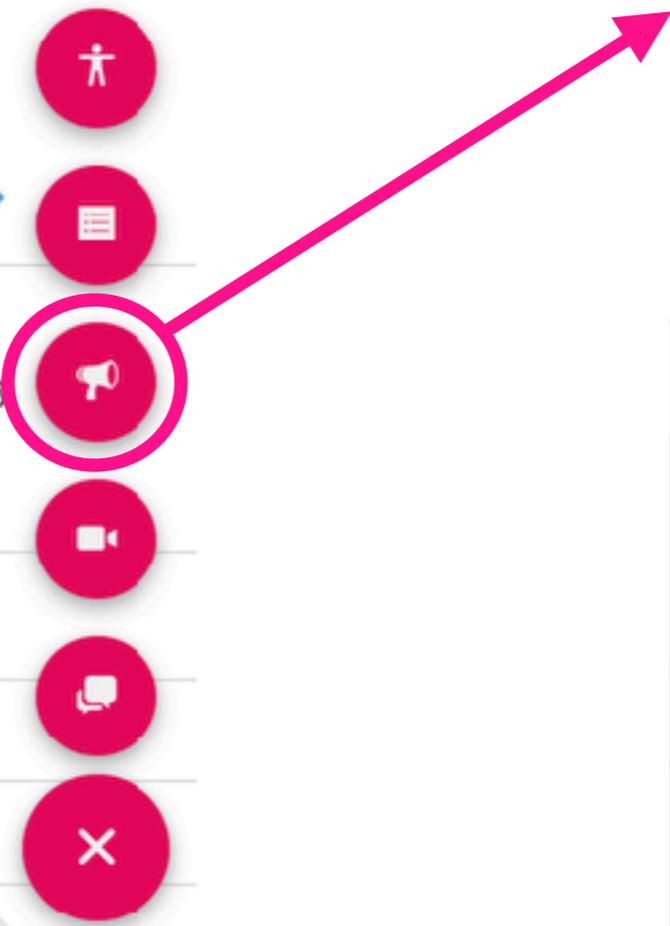
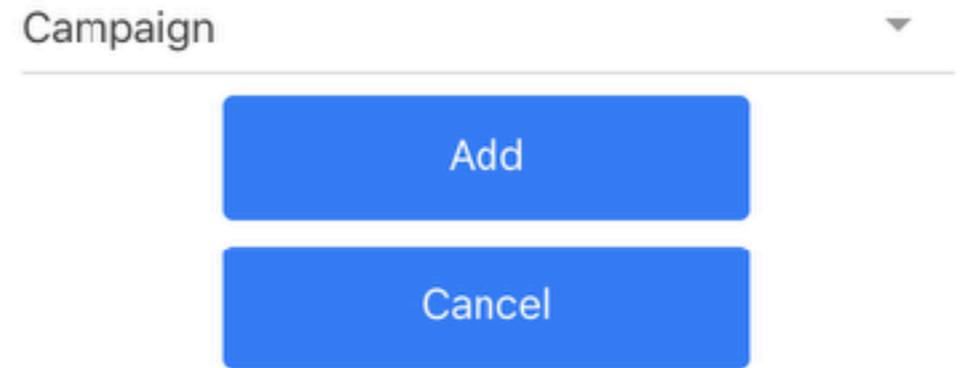
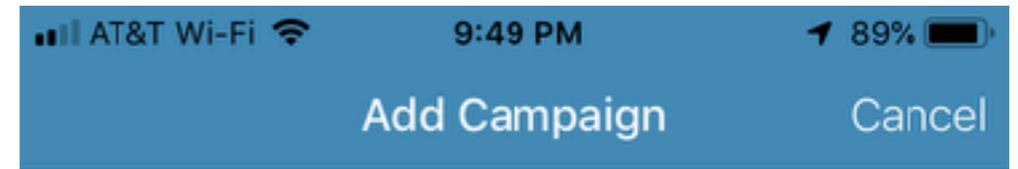
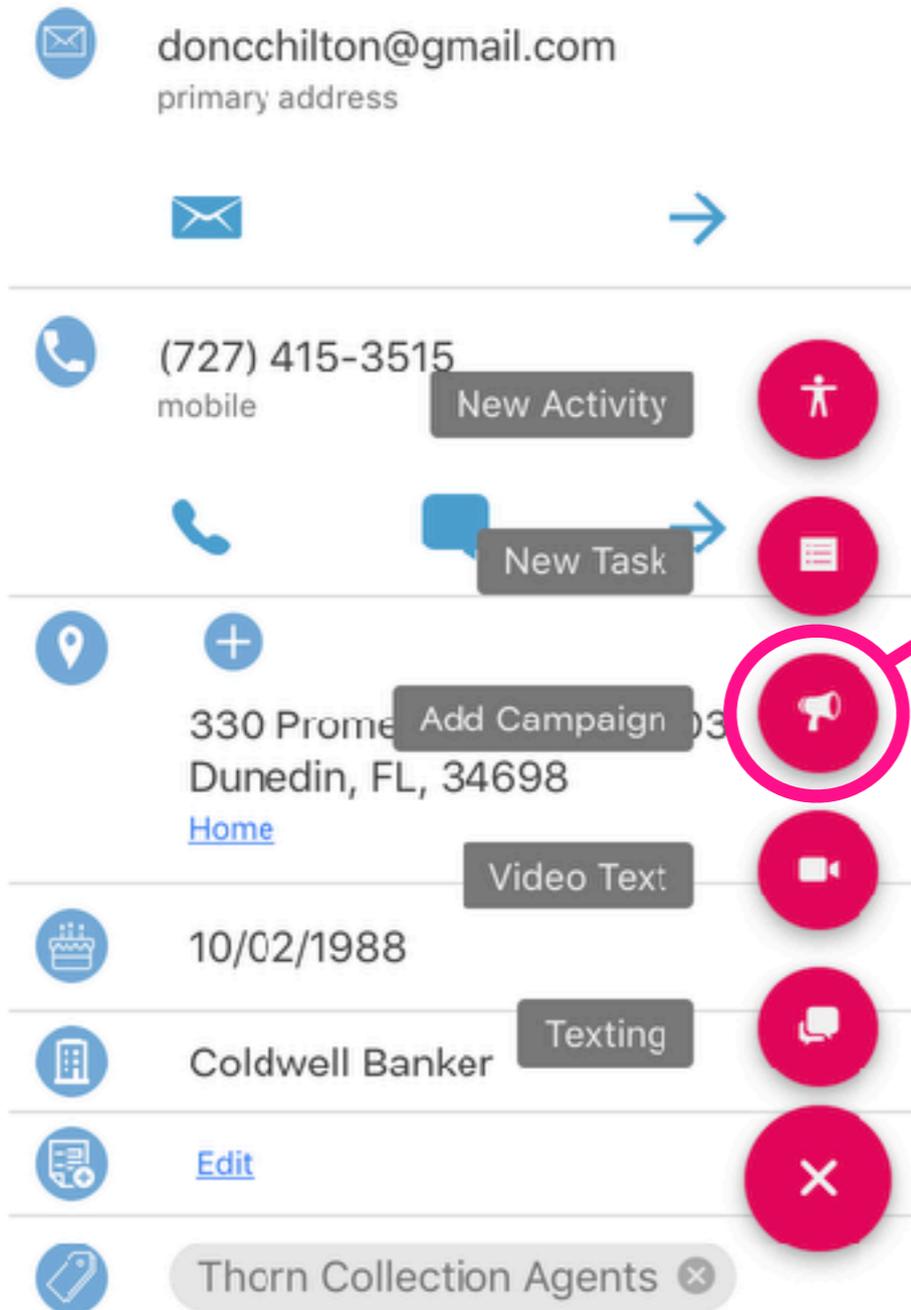
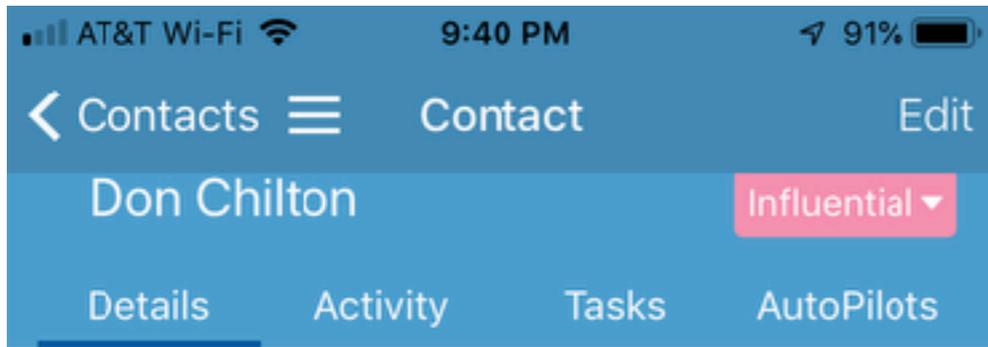
Make Public No

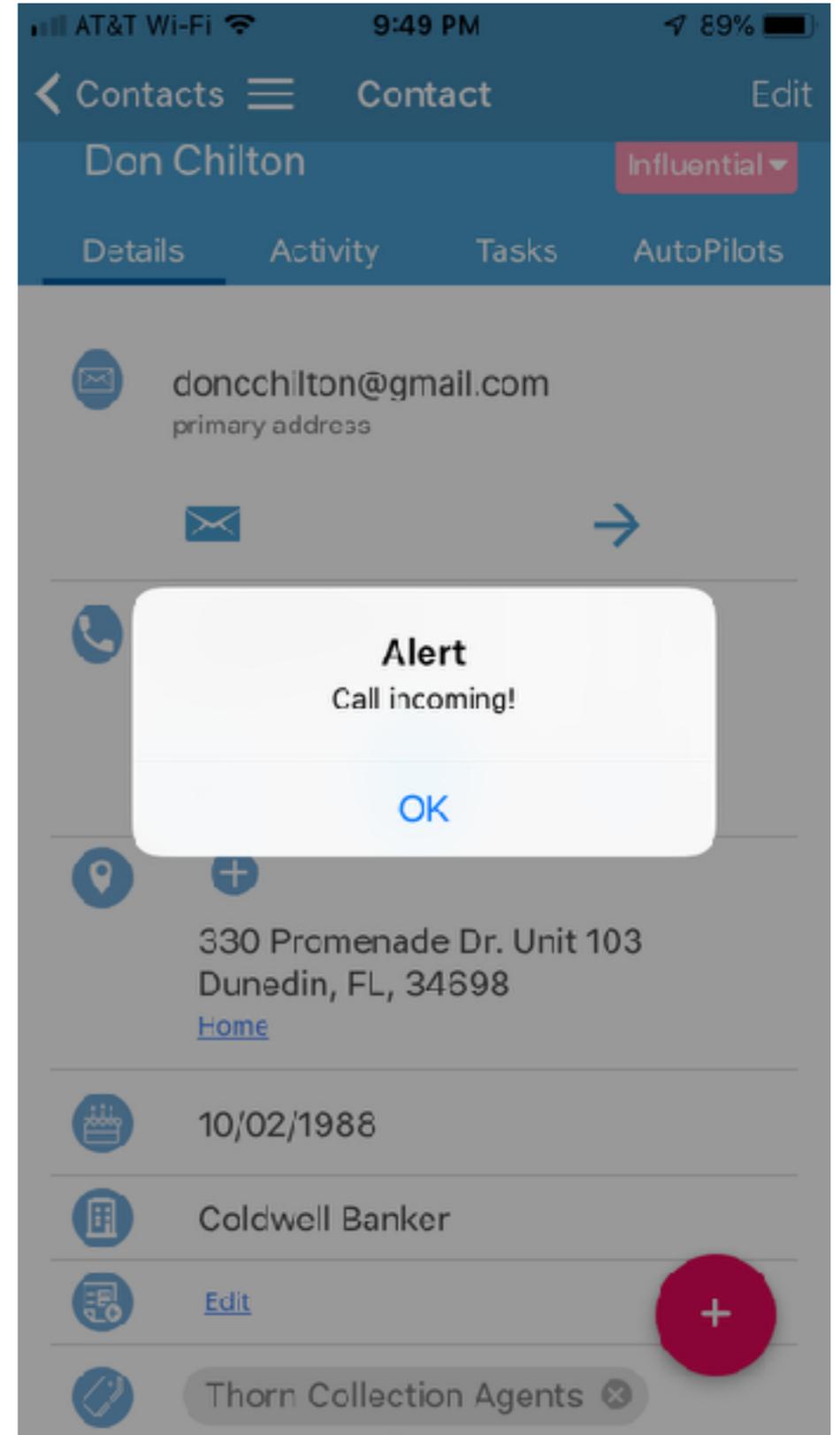
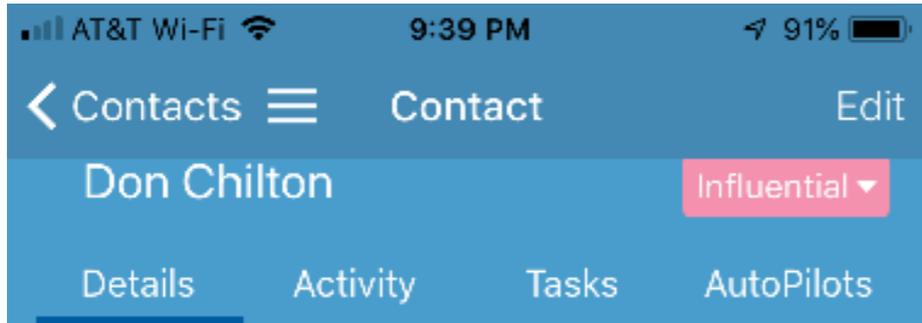
Reminder
How would you like to be reminded?

Type Specific Date

Due Date Feb 27, 2019 21:00

Status Not Completed

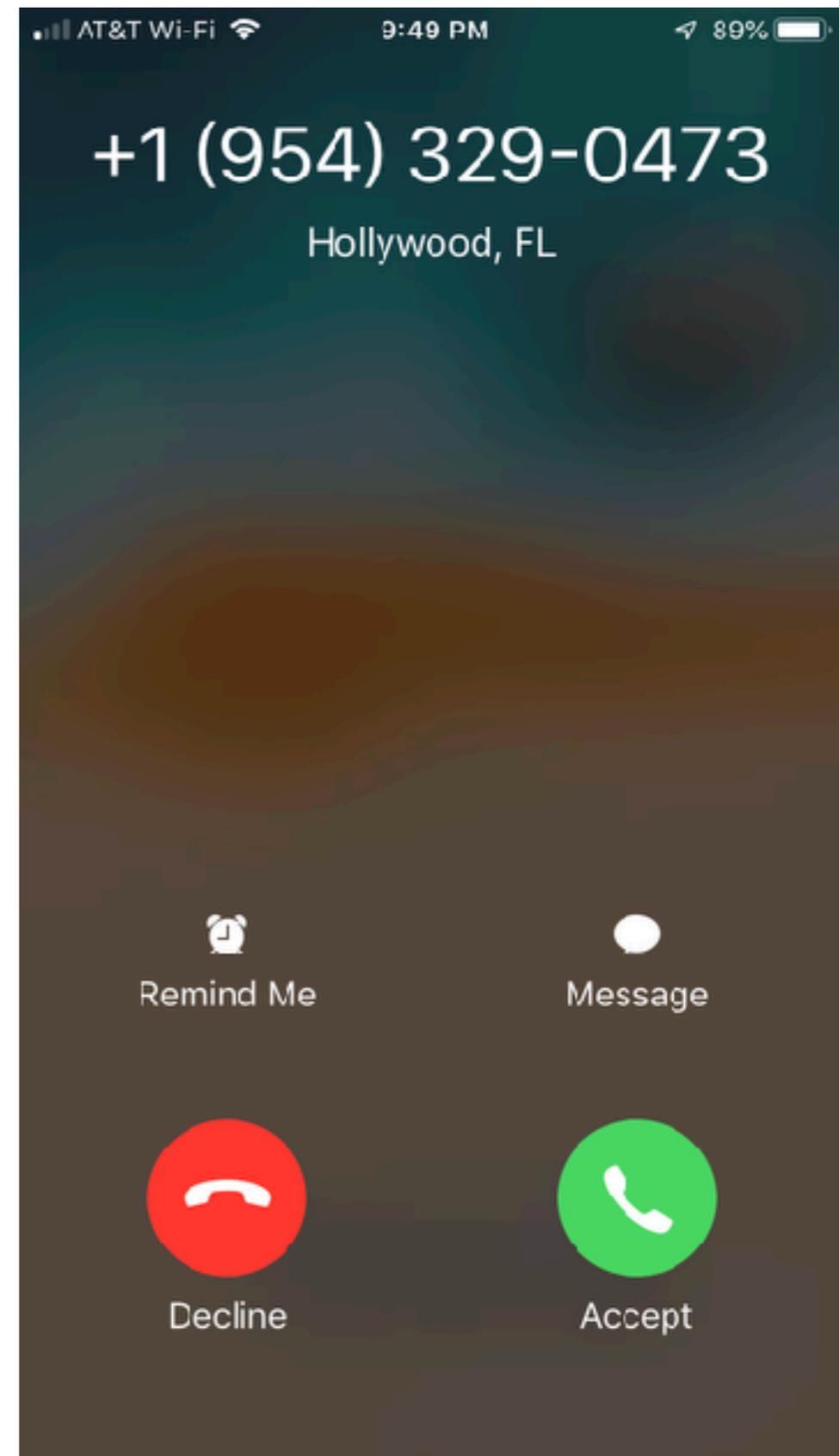




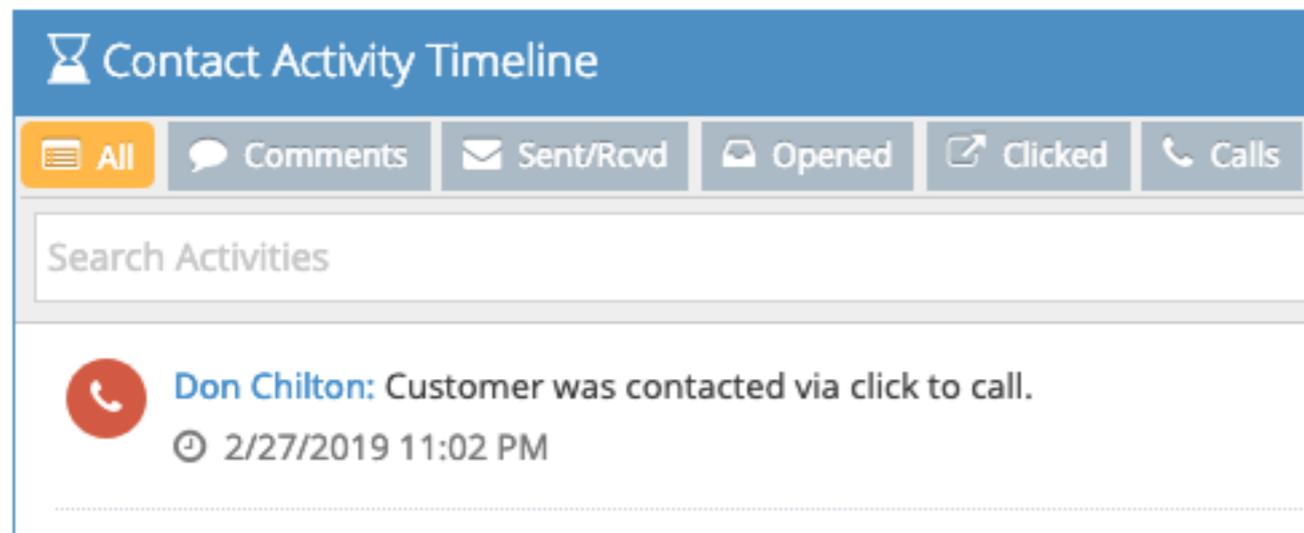
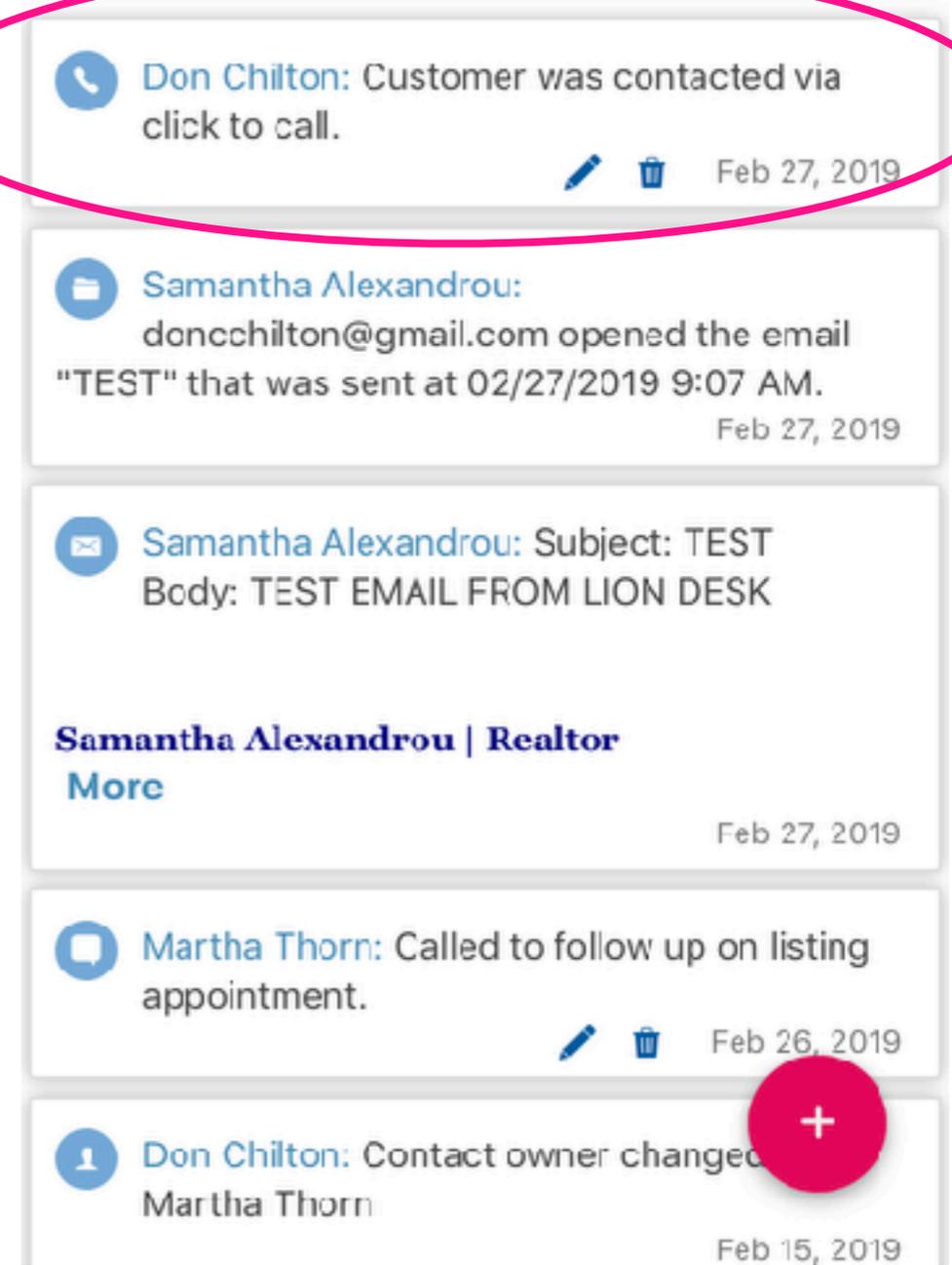
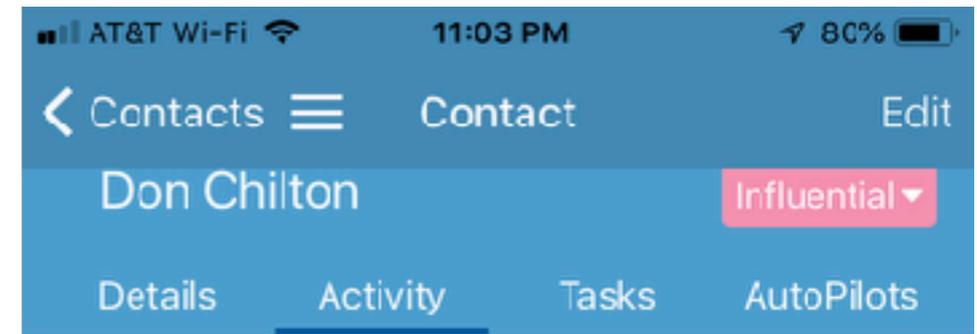
If you click the “arrow” next to a phone number of a contact, you will receive the notification that there will be an incoming call.

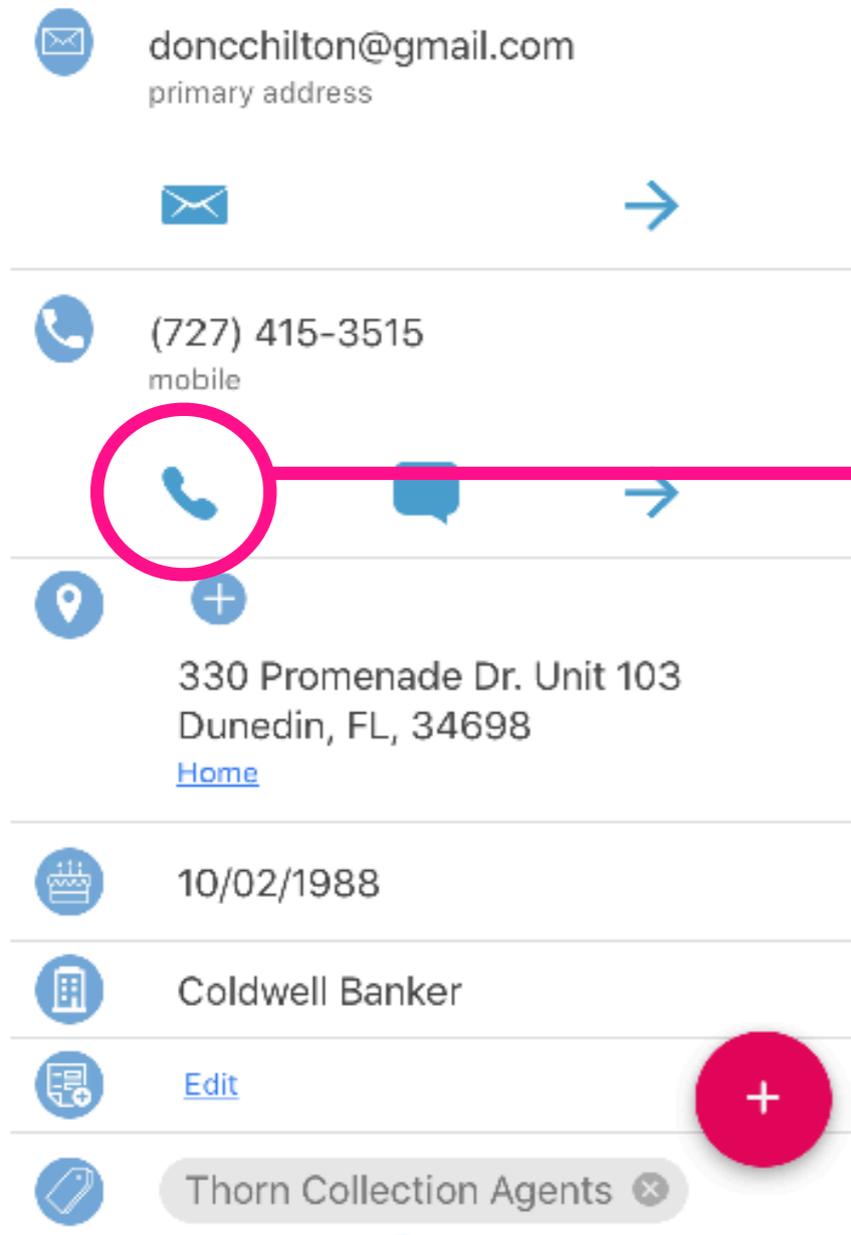
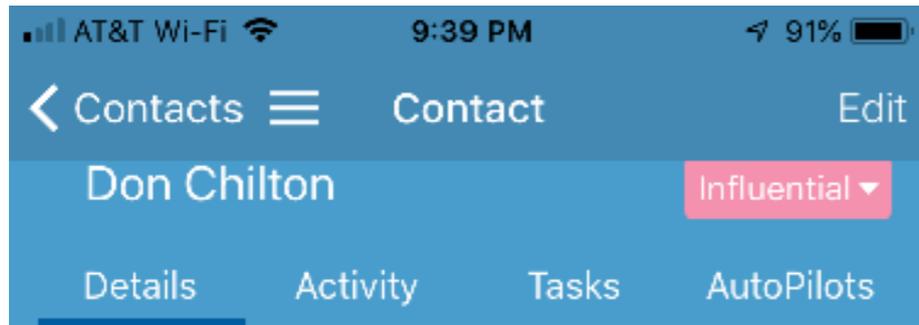
Your phone will begin to ring, receiving a call from a similar number to this one.

You will want to answer the call. It will say “Press 1 to be connected”, if you press 1, your call will be connected to the client.

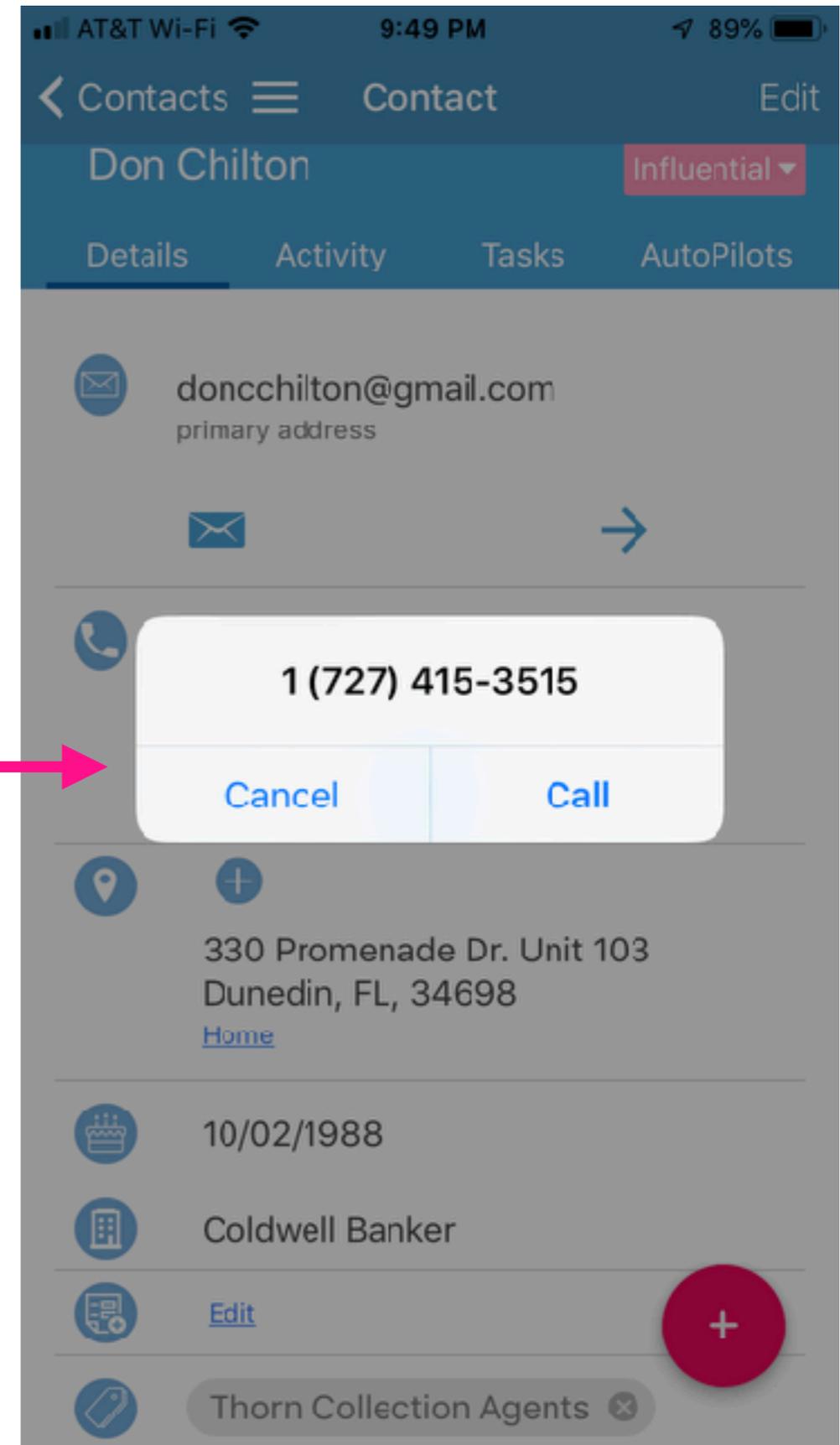


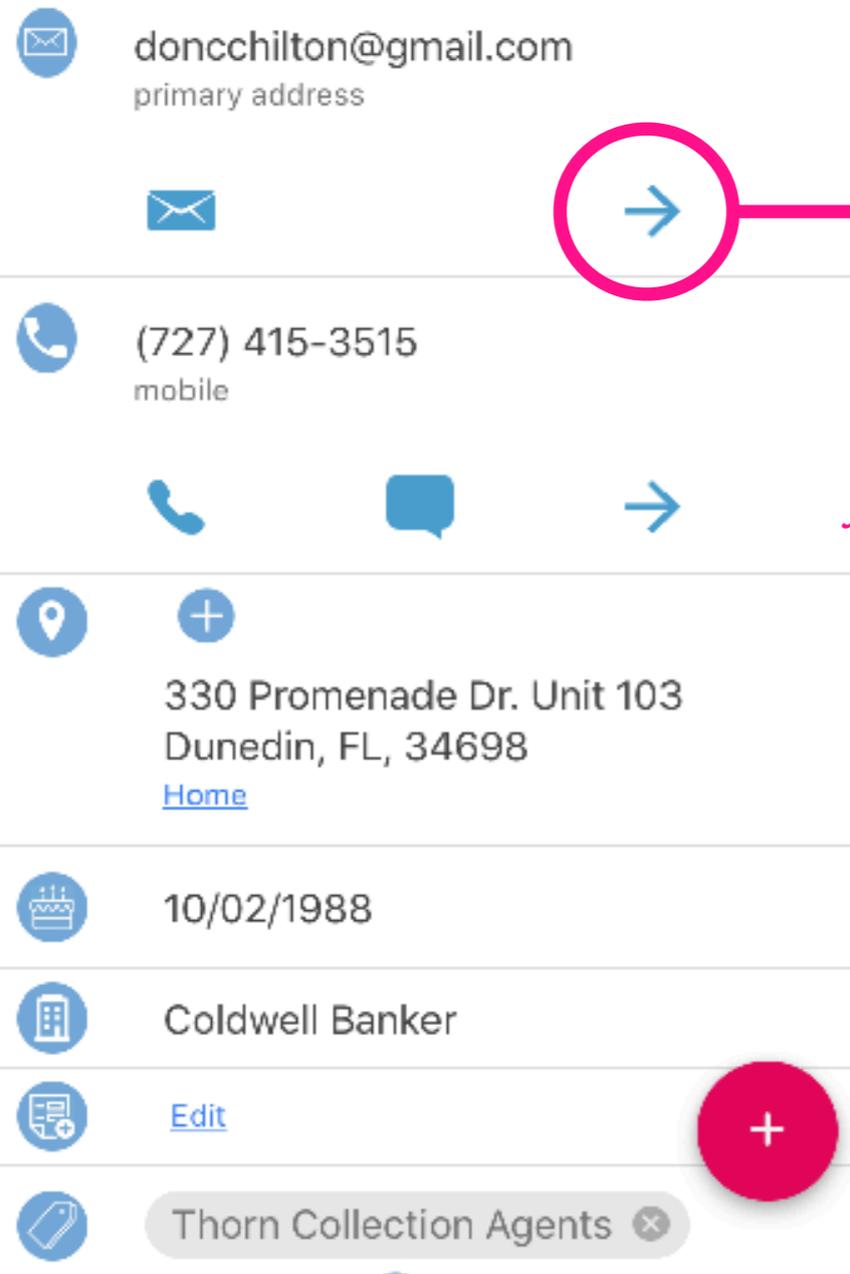
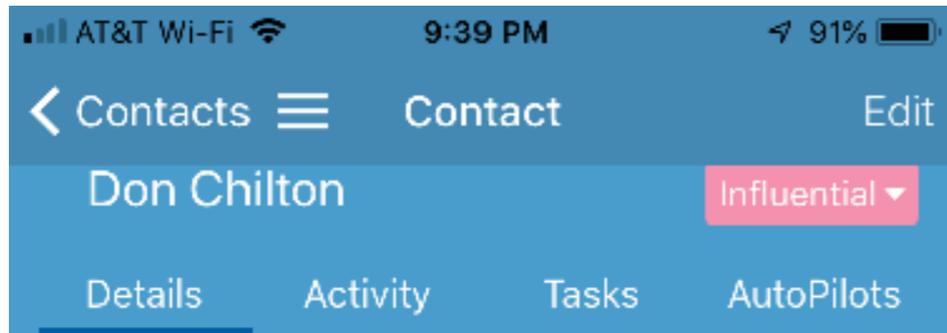
Under "Activity" you will see that a log of the call has been recorded in both the app and on the desktop version below.



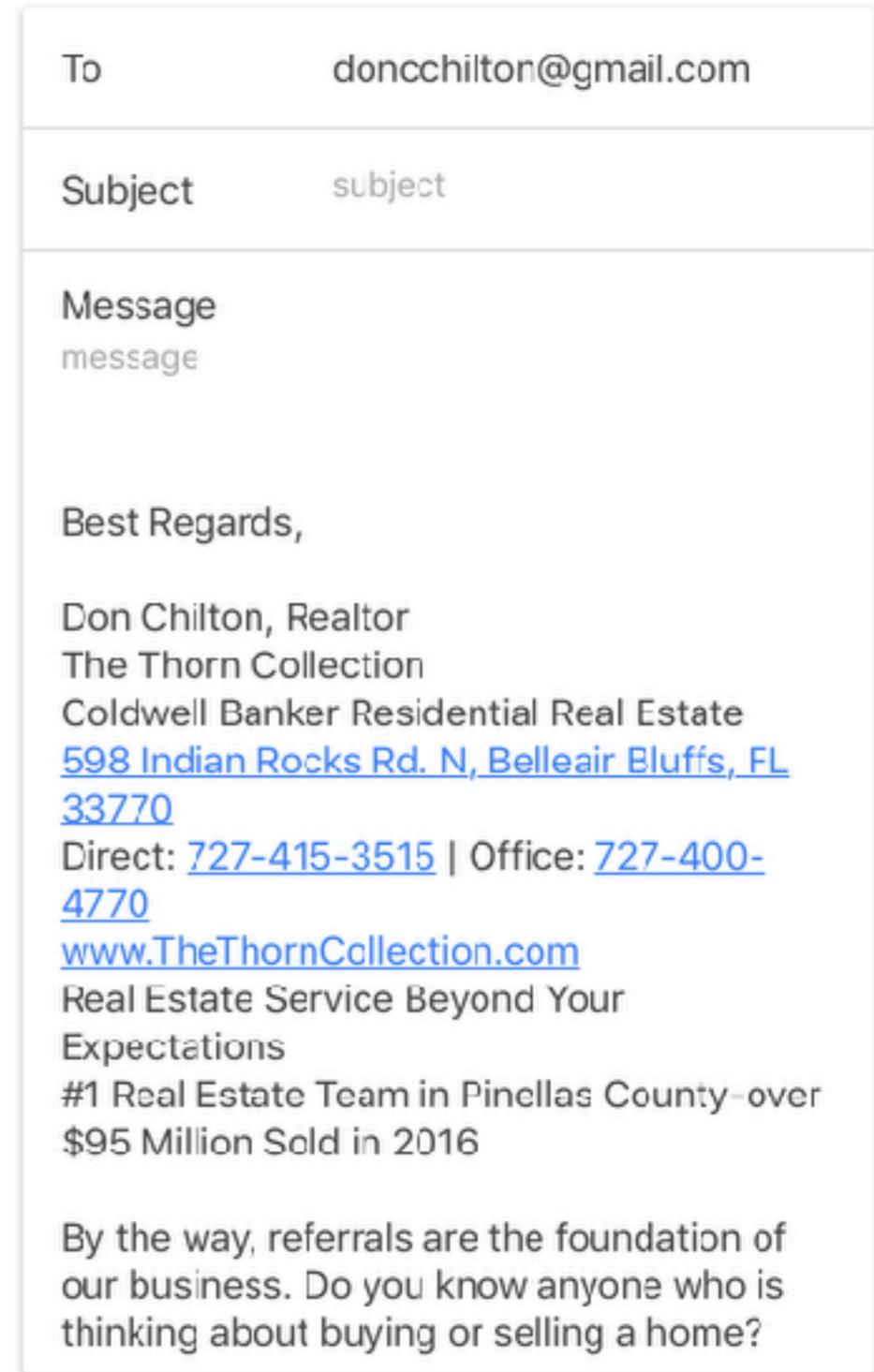
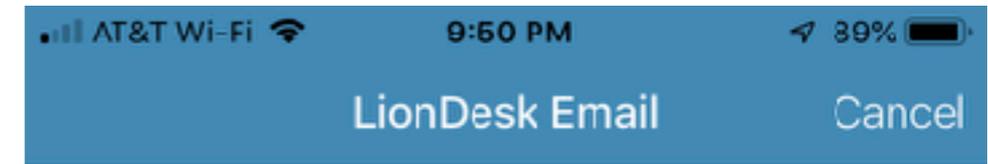


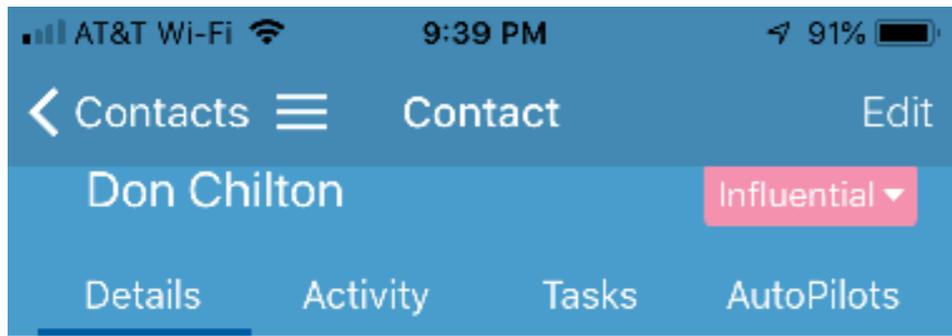
Selecting the phone icon will also allow you to call a contact directly without making the call through the Lion Desk system. This just means that a log of the call will not be created.





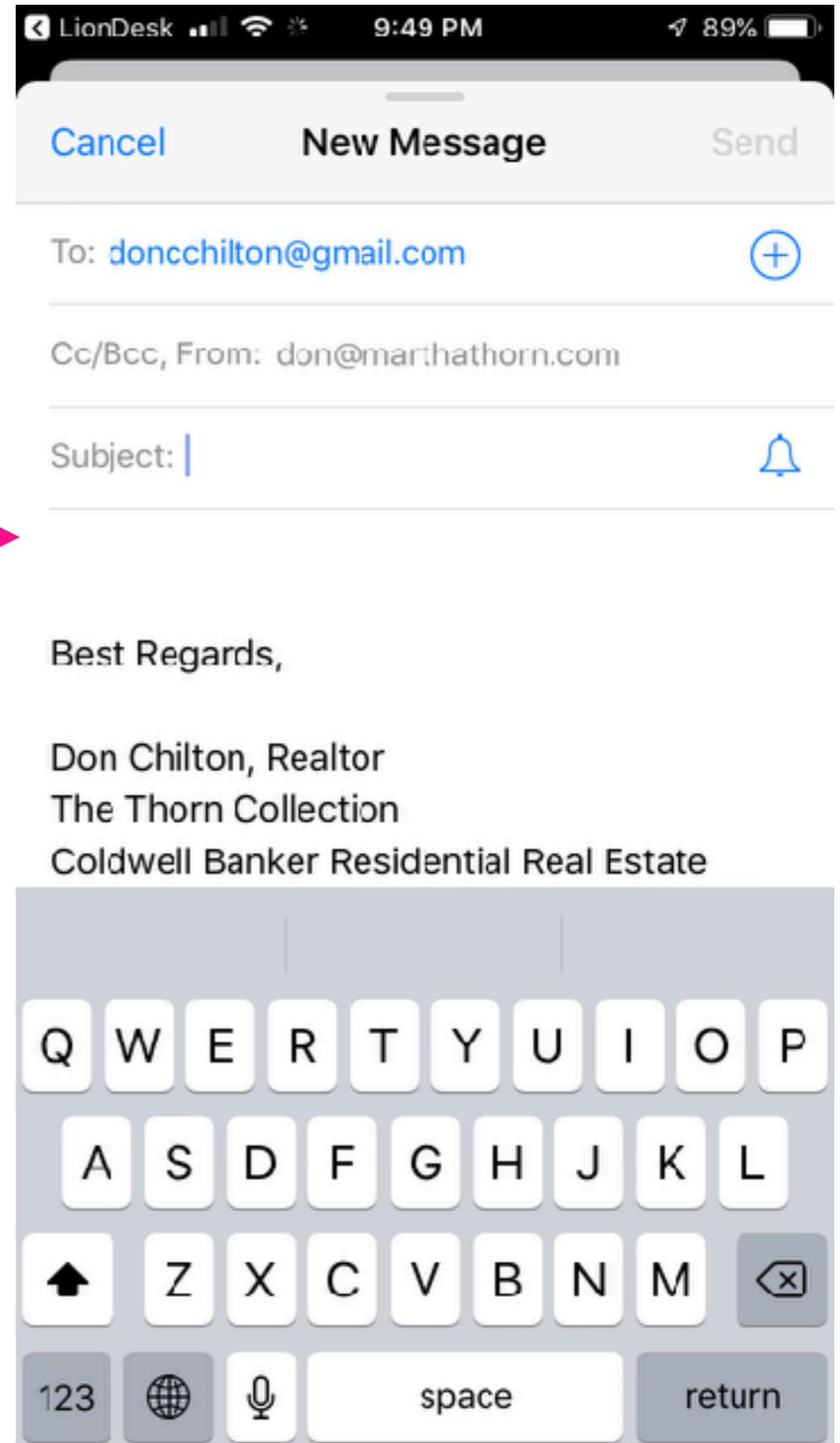
It is the same concept for emails. If you send an email from the app by selecting the arrow, the email will be sent through the Lion Desk system and a log will be added to the "Contact Activity Timeline".





- doncchilton@gmail.com
primary address
-  →
- (727) 415-3515
mobile
-   →
-  
330 Promenade Dr. Unit 103
Dunedin, FL, 34698
[Home](#)
-  10/02/1988
-  Coldwell Banker
-  [Edit](#)
-  Thorn Collection Agents 

*Normal email
through gmail.*





SECTION TWO:

Plans and Campaigns

WHAT IS A PLAN?

A plan in Lion Desk is a checklist of events and tasks that need to be completed in order to reach a certain goal.

That goal may be taking a property from “Coming Soon” to “Active Listing” or “Accepted Offer” to “Closing Day”.

Through trial and error, the team already has plans in place to reach these goals. Lion Desk allows us to apply those plans in a way where admin. and agents can see who has done what without having to check emails or make phone calls.

WHAT IS A PLAN?

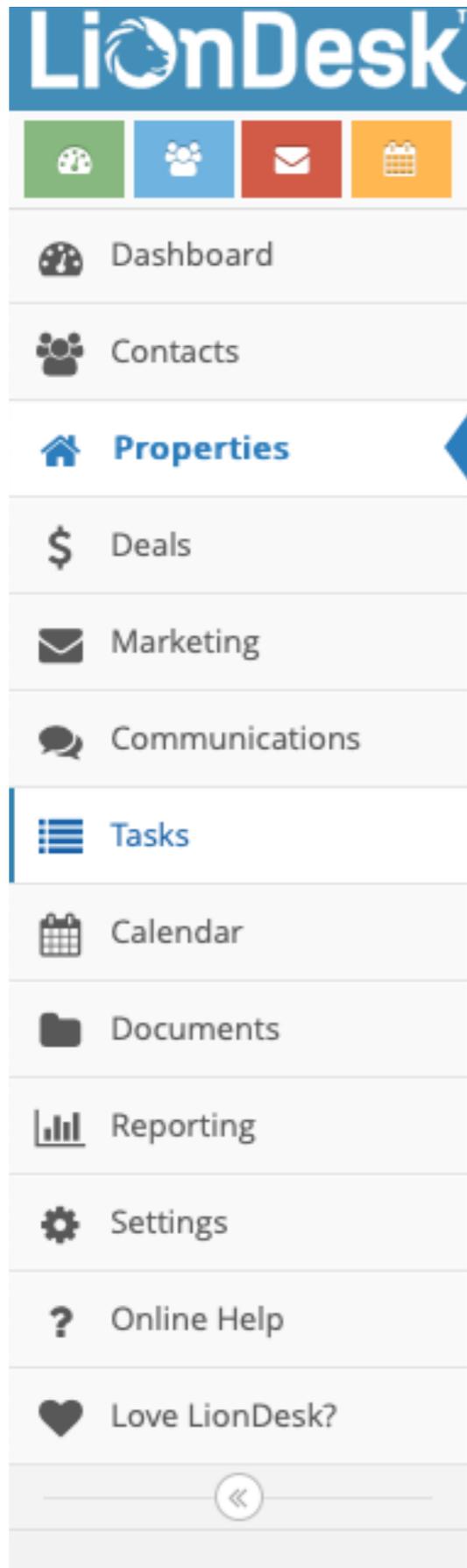
➤ PLANS = CHECKLISTS

- A plan contains a series of “tasks” that will occur on a specified date or time. These “tasks” could be a reminder of the effective date of a contract, a reminder that your inspection deadline is approaching, a reminder to pick up a closing gift, or a reminder to call and check in with a lender.
- All “tasks” in a plan that require your attention on any given day will be emailed to you around 5:30 a.m. from Lion Desk. They will also appear on your dashboard as “Current Tasks Due”. Some tasks will be assigned to agents and some will be assigned to Ginger or Cheri.
- All reminders for tasks can be adjusted. You can choose between receiving an email, text message, or phone call at a certain day/time to be reminded of the specific task.

OUR PLANS

- ▶ Listing Plans - Ginger Plans
 - ▶ Pre-Listing
 - ▶ Coming Soon
 - ▶ New Listing
 - ▶ Active Listing

- ▶ Closing Plans - Cheri/Shelly Plans
 - ▶ Buyer Closing Plan
 - ▶ Seller Closing Plan
 - ▶ Post Closing Plan



Where do I find the Plans?

Plans can be found under the Properties tab.

Lion Desk is very organized and on the left hand side of the screen, you can navigate anywhere you need to go. If you feel lost, in the program just remember that everything you need is on the left hand side of the screen.

The “Properties” tab will take you directly to the “Property Manager”. This is where all of our active listings and active contacts are stored. Ginger or Shelly will create the property for you and attach it to your contact when a new listing or new contact is submitted. They will then apply the appropriate “Plan” to the property.

Home > Properties Search Contacts...

Property Manager Transaction Follow Up Plans

NO Include Team Properties

[Add New Property](#)

Property Manager [Print] [Grid] [Refresh] [Export]

Display 25 records Search:

| | Contact | Next Task Due | Type | MLS | Escrow # | Address | City | State | Zip | Bd/Ba | Listing Date | Listing \$ | Closing Date | Sale \$ |
|---|----------------|---|---------|---------|----------|----------------------------|------------------|-------|-------|---------|--------------|------------|--------------|------------|
| Edit + Add Transaction Plan Remove | Kiril Shah | QComing Soon: Open House Plus 9 | Active | TBD | | 1015 Eldorado Avenue | Clearwater Beach | FL | 33767 | 6/5 | 11/15/2018 | \$1505000 | 11/15/2019 | \$0 |
| Edit + Add Transaction Plan Remove | Greg Winterogg | No Tasks Due | Active | | | 418 Bullwounded Lane | Largo | FL | 33770 | 44.2.5 | 9/6/2018 | \$1805000 | 9/6/2019 | \$1805000 |
| Edit + Add Transaction Plan Remove | | No Tasks Due | Active | | | 2333 Welherington Rd. | Clearwater | FL | 33765 | 5/5 2.5 | 2/13/2019 | \$924900 | 4/30/2019 | \$0 |
| Edit + Add Transaction Plan Remove | Sophia Sorolis | No Tasks Due | Pending | | | 780 Snug Island | Clearwater Beach | FL | 33767 | 3/2 | 1/1/2019 | \$679000 | 3/4/2019 | \$650000 |
| Edit + Add Transaction Plan Remove | Don Chilton | QBuyer Closing Timeline (Clone): Send copy of contract to title company handling closing. | Pending | | | 598 Indian Rocks Rd. N | Belair Bluffs | FL | 33770 | 3/2 | 10/1/2018 | \$1000000 | 10/31/2018 | \$1000000 |
| Edit + Add Transaction Plan Remove | Don Chilton | QBuyer Closing Timeline: Earnest Money Deposit Due. | Pending | U777777 | | 300 Promenade Dr. Unit 103 | Dunedin | FL | 34698 | 1/1 | 9/13/2018 | \$65000000 | 10/4/2018 | \$65000000 |

We will be sharing our transaction follow up plans with all of you this coming week.

To review plan tasks for our already create plans. Click “Transaction Follow Up Plans”.

Property Manager Transaction Follow Up Plans

✓NOTE: Create Follow Up Plans such as “Buyer Closing Plans”, “Seller Closing Plans”, “Listing Plans” and more. When you create a plan, you can associate it with a property so that tasks never slip through the cracks in your office. Coming soon will be contact notification when specific tasks are completed, so they know exactly where they and you are in the process of their home.

| Property Plans | |
|---|---------------------------------------|
| Plan Name | |
| Admin. Expired - Withdrawn | Tasks Share Clone Edit Archive Remove |
| Admin. Price Adjustment Plan | Tasks Share Clone Edit Archive Remove |
| Agent Listing Plan - Thorn Collection | Tasks Share Clone Edit Archive Remove |
| Agent Price Adjustment Plan | Tasks Share Clone Edit Archive Remove |
| Buyer Contract To Close - Thorn Collection | Tasks Share Clone Edit Archive Remove |
| Post Closing - Thorn Collection | Tasks Share Clone Edit Archive Remove |
| Pre-Listing Plan - Thorn Collection | Tasks Share Clone Edit Archive Remove |
| Seller Contract To Close - Thorn Collection | Tasks Share Clone Edit Archive Remove |
| Add New Plan | |
| Archived Property Plans | |

Seller Contract To Close - Thorn Collection Tasks

Rearrange the order by dragging individual items up or down

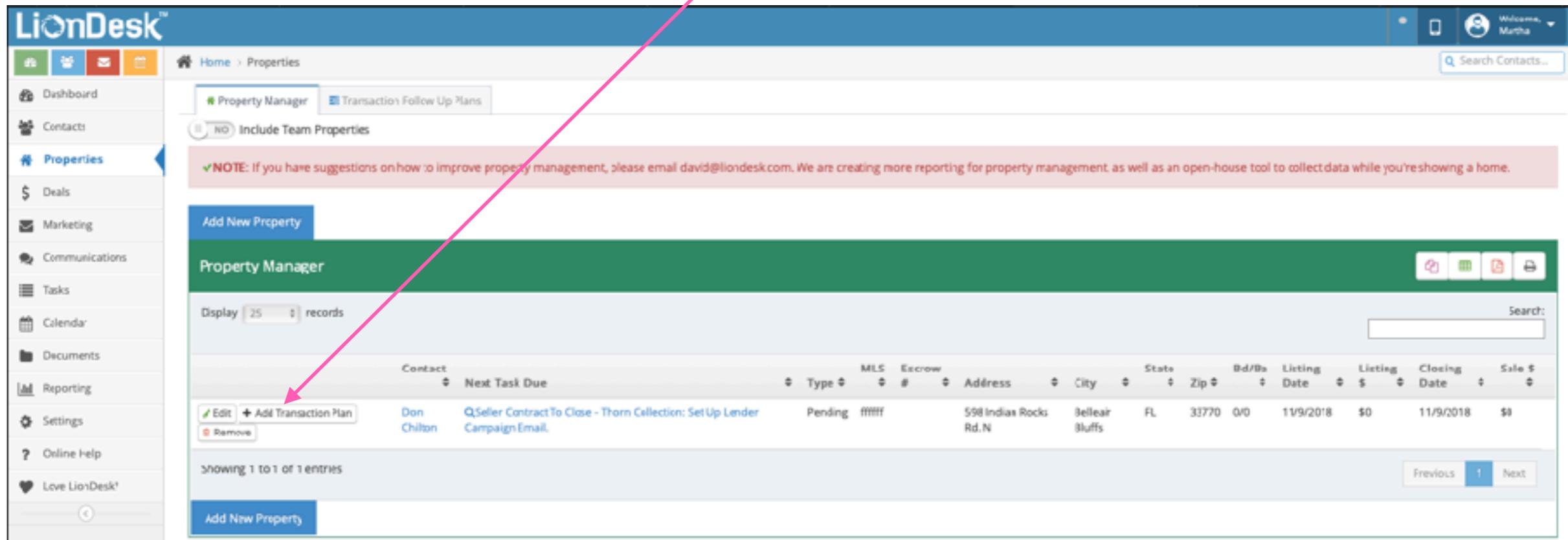
| Reminder / Assigned To | Description | Timing/Due | |
|------------------------|---|-----------------------|-------------|
| None | Effective Date | 0 day(s) Before Start | Edit Remove |
| None | Verify All Documents Have Been Submitted Via Thorn Portal Notes: All contract documents need to be submitted to Cheri as soon as possible. If you have documents that are outstanding, you need to notify Cheri as to when they will be completed. | 0 day(s) Before Start | Edit Remove |
| None | Update Franklin Sheet for Under Contract. | 0 day(s) Before Start | Edit Remove |
| None | Send all documents to Coldwell Banker. | 0 day(s) After Start | Edit Remove |
| None | Verify Property Status Change in MLS and Lion Desk. | 0 day(s) After Start | Edit Remove |
| None | Send Important Dates to All Parties/Welcome Email | 0 day(s) After Start | Edit Remove |
| None | Set up on campaign and verify email dates are correct. | 0 day(s) After Start | Edit Remove |
| None | Update Evernote Folder with contract documents | 0 day(s) After Start | Edit Remove |

All plans are listed here. To view the tasks in a plan, simply click “Tasks”.

When you click “Tasks”, the plan will appear to the right with all of the “Tasks” in the plan.

How do I apply a Plan?

When you click on the “Properties” tab, this page will appear. All of the properties are listed once added by Ginger or Cheri. To start a plan, click “Add Transaction Plan”. All of the Plans will appear and you can choose the correct one.



The screenshot shows the LionDesk interface. The left sidebar contains navigation options: Dashboard, Contacts, Properties (selected), Deals, Marketing, Communications, Tasks, Calendar, Documents, Reporting, Settings, Online Help, and Love LionDesk?. The main content area is titled 'Properties' and includes a search bar, a 'Property Manager' tab, and a 'Transaction Follow Up Plans' tab. A red banner contains a note: 'NOTE: If you have suggestions on how to improve property management, please email david@liondesk.com. We are creating more reporting for property management, as well as an open-house tool to collect data while you're showing a home.' Below this is a table of property listings. A red arrow points to the 'Add Transaction Plan' button in the first row of the table.

| Contact | Next Task Due | Type | MLS | Escrow | Address | City | State | Zip | Bd/Bs | Listing Date | Listing \$ | Closing Date | Sale \$ |
|-------------|---|---------|-------|--------|------------------------|-----------------|-------|-------|-------|--------------|------------|--------------|---------|
| Don Chilton | Q, Seller Contract To Close - Thorn Collection: Set Up Lender Campaign Email. | Pending | fffff | | 598 Indian Rocks Rd. N | Belleair Bluffs | FL | 33770 | 0/0 | 11/9/2018 | \$0 | 11/9/2018 | \$0 |

How do I apply a Plan?

Step 1: You will need to input a start and end date for the plan. These dates will usually be the effective date and the closing date.

Start Transaction Plan

Start Date & End Date
11/15/2018 12/14/2018

Q Don Chilton

Buyer Contract To Close - Thorn Collection

Start Plan Close Window

Step 2: You will then select the client associated with the property.

Step 3: Then select the appropriate plan.

Step 4: Then select "Start Plan"

Congratulations! You've applied a plan! Now, you will want to review the dates and alerts associated with the plan to make sure that everything is correct.

When a Plan is applied....

This screen will appear and you will see all of the “tasks”.

| | | Due Date | Description | Contact | Assigned To |
|--|--|--------------------|--|-------------|-------------|
| | | 11/9/2018 5:00 AM | Seller Contract To Close - Thorn Collection: Set Up Lender Campaign Email. | Don Chilton | |
| | | 11/9/2018 2:00 PM | Seller Contract To Close - Thorn Collection: Update Franklin Sheet for Under Contract. | Don Chilton | |
| | | 11/9/2018 2:00 PM | Seller Contract To Close - Thorn Collection: Send all documents to Coldwell Banker. | Don Chilton | |
| | | 11/9/2018 2:00 PM | Seller Contract To Close - Thorn Collection: Verify Property Status Change in MLS and Lion Desk. | Don Chilton | |
| | | 11/9/2018 5:00 PM | Seller Contract To Close - Thorn Collection: Effective Date | Don Chilton | |
| | | 11/9/2018 5:00 PM | Seller Contract To Close - Thorn Collection: Send Important Dates to All Parties/Welcome Email | Don Chilton | |
| | | 11/9/2018 5:00 PM | Seller Contract To Close - Thorn Collection: Set up on campaign and verify email dates are correct. | Don Chilton | |
| | | 11/9/2018 5:00 PM | Seller Contract To Close - Thorn Collection: Update Evernote Folder with contract documents. | Don Chilton | |
| | | 11/9/2018 7:00 PM | Seller Contract To Close - Thorn Collection: Verify All Documents Have Been Submitted Via Thorn Portal Notes: All contract documents need to be submitted to Cheri as soon as possible. If you have documents that are outstanding, you need to notify Cheri as to when they will be completed. | Don Chilton | |
| | | 11/12/2018 5:00 PM | Seller Contract To Close - Thorn Collection: Initial EMD Deadline. Notes: Send receipt to all necessary parties. | Don Chilton | |
| | | 11/12/2018 5:00 PM | Seller Contract To Close - Thorn Collection: HOA/Condo Doc Deadline | Don Chilton | |
| | | 11/14/2018 5:00 AM | Seller Contract To Close - Thorn Collection: HOA Application Deadline. | Don Chilton | |
| | | 11/19/2018 5:00 AM | Seller Contract To Close - Thorn Collection: Is Survey being ordered? Notes: Verify with buyer's agent. | Don Chilton | |

The due date and due time of each task.

A description of the task.

The contact that the task applies to.

Assigned to shows who on the Thorn Collection the task is assigned to.

Clicking the green pencil allows you to edit the details of a task.

WHAT IS A CAMPAIGN?

A campaign is a series of automated marketing efforts that will help you stay in touch with past and current clients.

Those efforts could be a sequence of phone calls, text messages, handwritten notes, pop-by's, or Thorn Collection marketing mail out's.

Campaigns are structured so that agents are reminded on a certain day/time that they need to follow up with leads or past clients.

WHAT IS A CAMPAIGN?

Example

- *Agent Reminder -Send Handwritten Happy New Year Note - January 3rd at 8:00 a.m.*
- *Automatically Sent Email -Super Bowl Trivia Email - February 1st at 8:00 a.m.*
- *Agent Reminder -Follow Up Call, “Were you able to use those tips at your Super Bowl Party? How is your new house? I’d love to stop by and say hello!” - February 5th at 8:00 a.m.*
- *Agent Reminder -Pop By Time! Bring your clients Forget Me Not Seeds to Celebrate Spring. Pop-By Tags are attached to this reminder. - March 1st at 8:00 a.m.*
- *Agent Reminder -Thorn Reports were mailed this month. Reach out to clients who might be interested in the statistics - April 1st at 8:00 a.m.*

WHAT IS A CAMPAIGN?

| TC Past Client Tasks | | | | | | |
|----------------------|--------------------------|---|--------------------------------|---|--------------------|--|
| Add New Task To Drip | | | | | | |
| Tasked To | Task Type | Folder | Desc | Subject | Timing/Due | |
| Campaign Initiator | Direct Mail: Letter | Handwritten Letters | New Year Handwritten Note | | 1/2/2019 3:00 PM | Edit Remove |
| Campaign Initiator | Agent Task - No Reminder | | | Note: Pop By Time! | 1/16/2019 2:00 PM | Edit Remove |
| Campaign Initiator | Agent Task - No Reminder | | | Note: Pop By Follow Up. | 1/17/2019 2:00 AM | Edit Remove |
| Campaign Initiator | Email Contact | LionDesk: Closed Clients Drip | 01 January - Super Bowl Trivia | Super Bowl Trivia Contest | 2/1/2019 5:00 PM | Edit Remove |
| Assigned User | Email Contact | 3 - 12 Month Home Tips & Holidays Drip(33 Touch) Auto Pilot (NEW) (NEW) (NEW) | #2C (14th) Valentines | Wishing you a Happy Valentine's Day | 2/14/2019 2:00 PM | Edit Remove |
| Campaign Initiator | Email Contact | LionDesk: Closed Clients Drip | 02 February - Academy Awards | How to Throw a Golden Academy Awards Party | 2/22/2019 8:00 PM | Edit Remove |
| Campaign Initiator | Direct Mail: Letter | Handwritten Letters | Spring Is Here! | | 3/13/2019 11:00 AM | Edit Remove |
| Campaign Initiator | Email Contact | 3 - 12 Month Home Tips & Holidays Drip(33 Touch) Auto Pilot (NEW) (NEW) (NEW) | #3B - St. Patrick's Day | Happy St. Patrick's Day! | 3/17/2019 11:00 AM | Edit Remove |
| Campaign Initiator | Email Contact | LionDesk: Closed Clients Drip | 04 April - Tax Returns | Earmarking Your Tax Return Dollars Towards a New Home | 4/5/2019 2:00 PM | Edit Remove |
| Campaign Initiator | Agent Task - No Reminder | | | Note: Pop By Time! | 4/17/2019 2:00 PM | Edit Remove |
| Campaign Initiator | Agent Task - No Reminder | | | Note: Pop By Follow Up. | 4/18/2019 11:00 PM | Edit Remove |
| Campaign Initiator | Email Contact | LionDesk: Closed Clients Drip | 05 May - Cinco de Mayo | Can you hear the Mariachis singing? | 5/3/2019 2:00 PM | Edit Remove |



WHAT IS A CAMPAIGN?

Holiday Emails Templates

| Desc | Content |
|-----------------------------------|--|
| 09 September - Labor Day | <p>Subject :Labor Day Body:Dear {{firstname}},</p> <p>As a way of keeping in touch, I provide my friends and clients with helpful ideas surrounding home ownership and other information I believe you will find useful. I hope you enjoy them.</p> <p>If it has to do with real estate, please think of me first. I'm here to help, answer questions, or point you in the right direction. And of course, I'm never too busy for you or your referrals. If you know someone else who has a real estate need or question, I promise to treat them in the same professional manner.</p> <p>Labor Day</p> <p>Labor Day is a United States federal holiday observed on the first Monday in September. The holiday originated in 1862 from a desire by the Central Labor Union (of New York City) to create "a day off for the working man." Parades and pro-union demonstrations were central to the holiday at least through the time of World War I.</p> <p>Today, Labor Day is often regarded simply as a day of rest. Forms of celebration include picnics, barbecues, fireworks displays, water sports, and public art events. Families with school-age children take it as the last chance to travel before the end of summer. In addition, Labor Day marks the beginning of the season for the National Football League and NCAA College Football. The NCAA usually plays their first games the weekend of Labor day, with the NFL playing their first game the Thursday following Labor Day. Great Labor Day Hot Dog Recipe Ingredients</p> <ul style="list-style-type: none">2 packages jumbo hot dogs3/4 cup chopped onion3 tablespoons butter or margarine1-1/2 cups chopped celery1-1/2 cups ketchup3/4 cup water1/3 cup lemon juice3 tablespoons brown sugar3 tablespoons vinegar1 tablespoon Worcestershire sauce1 tablespoon yellow mustard16 hot dog buns, split <p>Preparation</p> <p>In a saucepan over medium heat, sauté onion in butter until tender. Add remaining ingredients except hot dogs and bring to a boil. Reduce heat; cover and simmer for 30 minutes. Cut three 1/4 inch deep slits on each side of hot dogs; place in a 2 1/2 quart baking dish. Pour the sauce over the hot dogs. Cover and bake at 350 for 40-45 minutes or until heated through.</p> <p>All my best, {{emailsignature}}</p> |

*Template
Emails*

*Scheduled
Delivery*

*Personalized
by Agents*

WHAT IS A CAMPAIGN?

Templates for handwritten notes.

Create New Direct Mail Template

Short Description 

Describe this template... (Letter #1, Letter #2, etc.)

Letter Postcard Cost Per Letter: \$1.15

 Note: Direct mail service is currently only available for United States addresses.

Standard

Recipient Address: Mailing

Note: Primary address will be used if available. Otherwise, the first entry of this type will be used.

Content: HTML Format Existing PDF File

Print: Black/White Color

Double-sided: Yes No

Address Layout: 1st Page Separate Page

HTML Format [Preview PDF](#) [Preview Contact \(optional\)](#)

Source                                 

Format - Font - Size - A- B- LionDesk

WHAT IS A CAMPAIGN?

Create New Call Script

Attachments

Short Description ⓘ Describe it... (Email #1, Email #2, etc)

Source | | |

Folder Name ⓘ 3 - 12 Month Home Tips & Holidays Drip(33 Touch) Auto Pilot (NEW) (NEW) (NEW)

*Easy to find
scripts for
making
calls to
clients.*

WHAT IS A CAMPAIGN?

Confirmation of receipt. Also shows date/time opened!

Copy of email that was sent.

Recent Contact Activity Scroll To View More ^

All Sent Opened Clicked Calls Texts Website Activity

| | | |
|------------------|--------------------|--|
| Allison Bouchard | 11/9/2018 12:36 PM | allison@marthathorn.com opened the email "Happy St. Patrick's Day!" that was sent at 11/09/2018 9:35 AM. |
| Allison Bouchard | 11/9/2018 12:35 PM | Subject: Happy St. Patrick's Day! Body: Allison Happy St. Patrick's Day! Here's a fun recipe to help make the day festive: Irish Coffee Brownies As warmly welcoming as the traditional Irish beverage, these brownies have a little whiskey in the batter, a little more in the glaze. ingredients <ul style="list-style-type: none">• 1 1/4 cups granulated sugar• 3/4 cup butter or margarine, softened• 1/2 cup unsweetened cocoa powder• 2 eggs• 1 teaspoon vanilla• 1 1/2 cups all purpose flour |

When agents are able to see that a client has received and opened their email, it gives the agent another opportunity to reach out with a text or phone call to say “Hey! Did you see that great recipe I sent you? Those brownies would be perfect for your next book club meeting!”

Questions, Suggestions, Concerns

Agent Name:

Questions, Suggestions, Concerns

Agent Name: