A REALVOLVE HOW-TO | By Mark Stepp

OnBoard Day 19 - Workflow Streams

Now that you have created a few templates, I'll explain how to use them in an automated method using Workflow Streams.

What is a Workflow Stream?

A workflow stream is a pre-designed series of activities that is setup one time and used to automate typical business processes. Each activity in the workflow stream can be assigned a date based on criteria you specify as being the normal time to start a given activity. 3 days before closing send closing reminder email, 1 day after closing pick up sign from property, 5 days after the closing date I want to send a " *Hope you are moved in*" email. Workflows can be created with any number of activities and use any of date fields for the criteria.

By creating your own workflow streams or utilizing workflows from the workflow library, you can systematize the daily repetitive tasks which occupy your time. Think of a workflow as a pre-designed sequence of steps that helps to methodically and consistently reach an objective. A workflow performs a series of actions to reach an intended result in less time.

Much of your daily work can be turned into workflow streams. What do you do each day that is repetitive in nature? Review the projects that you have done in the past 30 days, the new listing agreements received, the closings you completed and decompose each process step-by-step. The more steps you can enumerate and capture in a workflow stream, the better.

TIP: *Don't trust things to memory – Items get overlooked and fall through the cracks…*

By forcing yourself to following the activities on a day-by-day basis, it enables you to consistently give each client the same great service day in and day out. That great service translates to superior customer satisfaction and ultimately, more referrals and repeat business.

Realizing the power of the workflow in your day-to-day processes will save you time and keep you organized.

Workflow examples:

Activities to perform a task…

- After a new contact is received from a lead generation website.
- Automatically import contact information.
- Categorizing contact based on lead source.
- Offering free information based on information provided.
- Automated daily, weekly or monthly prospecting emails.

Activities to prepare for a listing presentation.

- Checklists to help prepare yourself for appointments.
- Appointment reminder emails.
- Follow-up emails after the listing appointment.
- Offering free information by email.

Activities after a seller signs a listing agreement.

- To Do's and Checklists.
- Automated emails to service providers for staging.
- Facebook, Twitter or LinkedIn messages to contact.
- Automated data collection for staff.
- Automated response emails from showing appointments.
- Automated status updates.
- Phone call reminders.

Activities after Buyer signs a sales contract.

- Automated Reminders to Lenders, Appraisers, Title Reps
- Checklist Requirements
- Special case options to branch to other workflows
- Email Buyers and other party members on status
- Closing reminders and what to bring.

Activities for post-closing follow-up

- Email buyer monthly for 7 years.
- End of Year HUD emails for each Buyer.
- Annual sphere of influence emails
- Referral "Thank You" emails

ACTION STEPS:

Refer to WorkflowTutorial.pdf and create the "**New Listing Agreement**" workflow on pages **45-47** then add the 9 example activities to the workflow stream on page **64-74**.

Note: Following the steps outlined in the document you will help you gain the basic skills required to create your own workflows.

If you have any questions, please contact us at: support@realvolve.com

---

Questions?

Please direct questions and comments to support@realvolve.com.