16 Realvolve Workflow Benefits

Workflow Training

1. **Task Items**: Schedule simple tasks that may or may not have due dates or times.
   Benefit: This prevents things from slipping through the cracks that could impact future events or delay other events.

2. **Automated Drip Campaigns**: Set up a standardized communication schedule to send email and text messages at regular intervals.
   Benefit: Free yourself from time consuming communications with new leads and clients using personalized, pre-written email templates or send monthly newsletters to a floating list of contacts tagged as 'Newsletter'.

3. **Scheduled Appointments & To Do's**: Use specific contact, property, or transaction milestones to populate your Realvolve calendar with birthdays, anniversaries, listing appointments, closings appointments, or hundreds of other dates.
   Benefit: Helps you to be on-time and on-task.

4. **Pre-Appointment Reminders**: Send yourself, your team, your clients or vendors a reminder "x" days before scheduled appointments.
   Benefit: Prevent appointment day surprises with a timely email or sms messages.

5. **Delayed Activities**: Assign follow-up/follow-through activities "x" days, weeks, months or years after specific milestone dates.
   Benefit: Great for making sure tasks are completed after specific milestones like sending "Thank You" messages after closing day.

6. **Conditional Delays**: Assign activities to wait until another activity is completed.
   Benefit: Use this technique to prevent inspection report verification activities from coming due until after the inspection has been completed.

7. **Deadline Reminders**: Assign contingency reminders for early notification of important contractual deadlines.
   Benefit: This is important do prevent deals from falling apart.

8. **Date Recalculation**: Recalculate activities which are calculated from milestone dates that are unknown or changed after the workflow starts.
   Benefit: Use this feature to assign reminders on unknown or changed dates.

9. **Standard Checklists**: Group several checklist items together into one activity for verification of completion. The individual activity is not considered complete until all checklist items are handled.
   Benefit: Use checklists to verify completion of specific tasks for a listing process or the existence of closing documents. Checklists prevent calendar clutter since multiple items are contained in one activity.

10. **Data Entry Checklists**: Use merge fields in a checklist to verify field values.
    Benefit: Merge field checklists make data entry easy, reduces learning curve, and allows field verification without knowing the field location.

11. **Checklist Actions**: Actions to send emails, SMS texts, and Twitter messages, add or remove tags as well as starting or stopping workflows can be dependent on completed or non-completed checklist items.
    Benefit: Perform one set of actions actions when checklists are not complete and reassign the due date and another set of actions based on completed checklists.

12. **Branching Actions**: Assign multiple Actions to an activity to add conditional processing while completing activities.
    Benefit: Branching offers multiple options to handle special conditions.

13. **Chaining Workflows**: Start another workflow on completion of the previous workflow activity.
    Benefit: Prevents contacts from "falling off the end of the earth" after a workflow ends.

14. **Workflow Termination**: Stop workflows assigned to a given contact, property or transaction from an action.
    Benefit: Useful when starting a transaction workflow to stop the linked property workflow.

15. **Activity Grouping**: Create up to 20 different activity "groups" per workflow so that unneeded activities can be quickly eliminated when starting a new workflow.
    Benefit: Use this technique to prevent unwanted calendar activities. You don't need "HOA" related activities when there is no HOA. You don't assign "Lending" related activities on CASH offers.

16. **Google Sync**: Any Realvolve activity can synchronize with Google Calendar.
    Benefit: Use this option to keep all devices up-to-date that sync with Google apps.