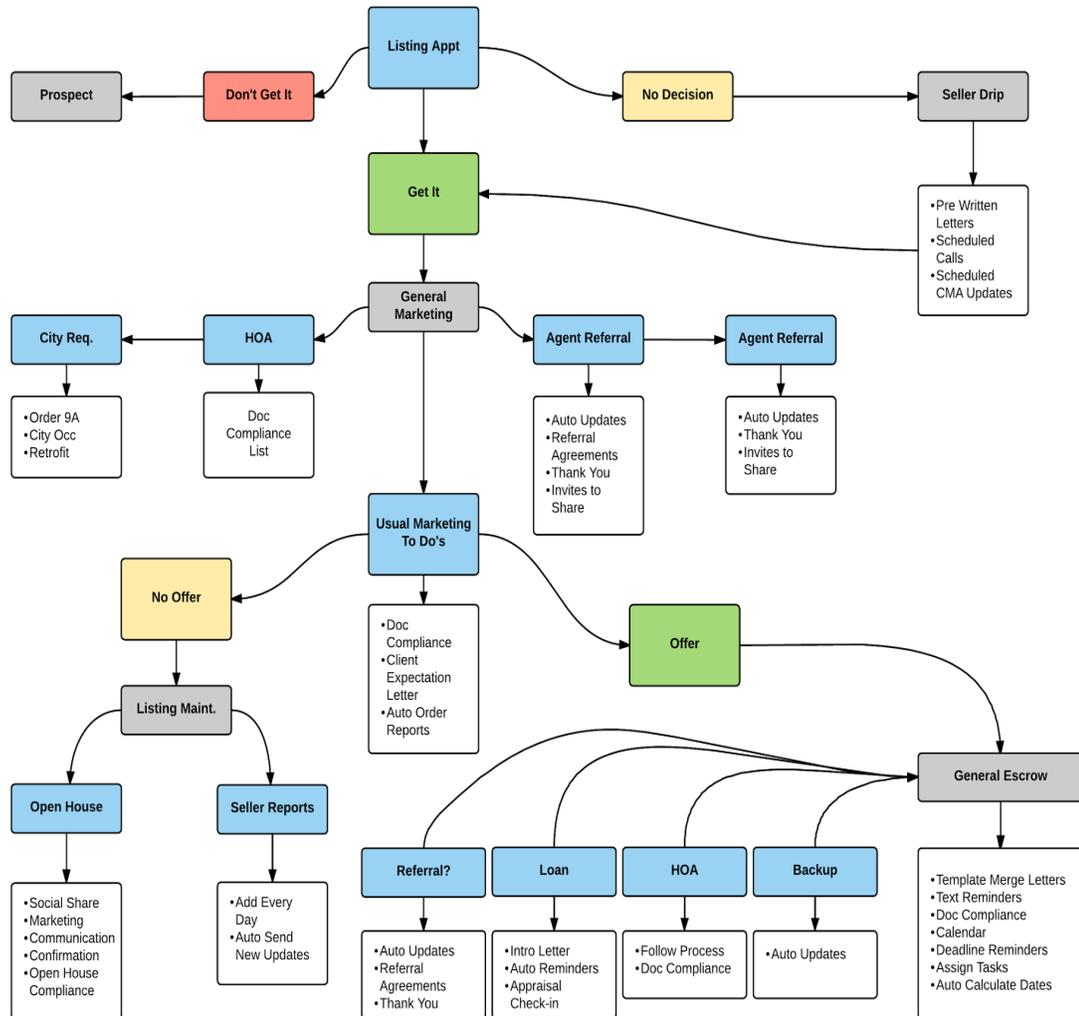


Branching

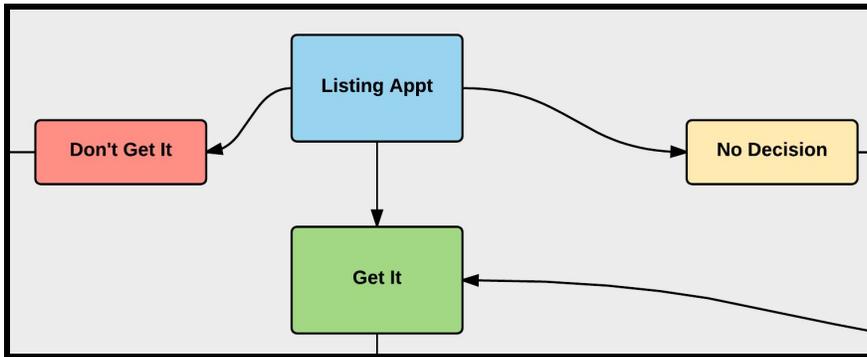
Basics: All Users

Most “Action Plans” found in other software systems will get you from point A to point Z using a linear path: Day 1, do this. Day 2, do that etc ... While this can work in a few cases, it’s not the best solution for things you do every day like listing properties or the contract-to-close process which can look more like this:

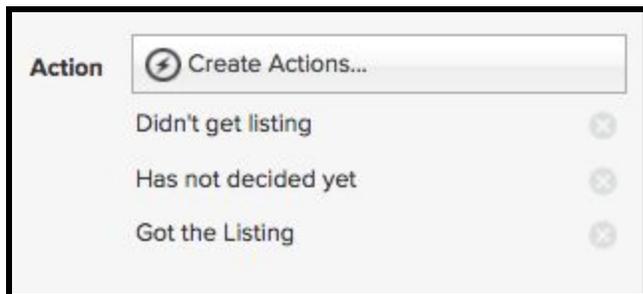


There are many possibilities along the way which force you to alter your plan one way or another. Identifying these options in advance and deciding which direction to choose to circumvent problems, add clarity, or move through a given path shows the power of workflows!

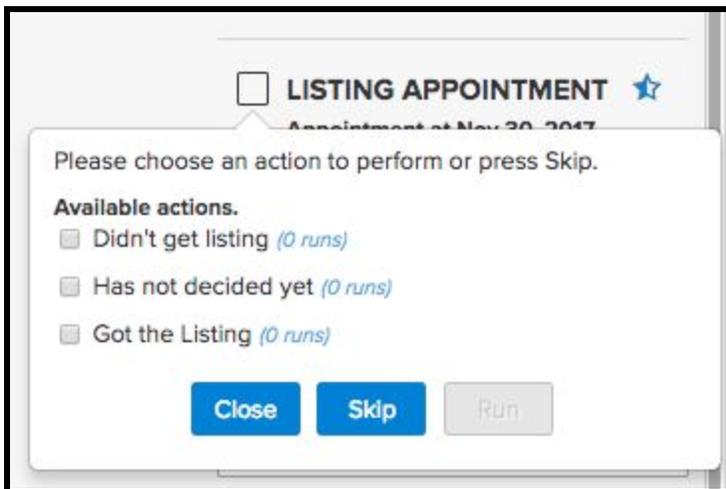
A **branch** is a point in the process which has more than one possible direction to go. The first place we see this in the example above is the “Listing Appt” which has 3 possible outcomes: 1) You **didn’t get**



the listing so you need to do more prospecting.
2) They **have not decided yet** so you should do additional nurturing with a drip campaign or
3) you **got the Listing** so start the general marketing process.



Setting up the Realvolve workflow to handle this is as simple as setting up an activity with the 3 actions. One action for each of the possible outcome to start or stop other workflows, send messages, or update tags.



When completing the activity, the list of options will display, allowing you to select the correct path for the situation so the workflow can do the work for you.

It’s that simple!

You just have to refine each step of the process with as much detail to produce an

effective path. A good plan guides you through each step of the process. This builds customer confidence and satisfaction which leads to repeat business and referrals.

([SEE VIDEO](#)) This video covers Workflow Checklists and Branching

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

Questions?

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

