

Workflows

Basics: All Users

What is a Workflow?

A workflow is a pre-designed series of activities used to automate typical business processes. Each activity in the workflow can be assigned a date based on a milestone date 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 date field as milestone date criteria.

By creating your own workflow 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 workflows. 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, the better.

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

Consistent service is given to your clients when you force yourself to following the workflow processes. That 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 Overview Videos:

- List View: Left Side of the Screen ([SEE VIDEO](#))
- Creating a New Workflow - Part 1: Required Workflow fields ([SEE VIDEO](#))
- Creating a New Workflow - Part 2: Non-Required Workflow fields ([SEE VIDEO](#))
- Adding Activities to the Workflow ([SEE VIDEO](#))
- Adding Activities (Other fields explained) ([SEE VIDEO](#))

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.
- Automated data collection/verification for new staff members.
- 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
- 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
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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.

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