

TAKE YOUR BUSINESS TO THE NEXT LEVEL



**Organize Your Database | Create More Appointments
Track Your Performance | Operate From Any Device
Work Smarter With Analytics/AI**

BERKSHIRE HATHAWAY
HomeServices
Georgia Properties

Forever Cloud Platform

- **BHHS REsource Center**
- **BHHS Marketing REsource**
- **BHHS Social Media REsource**
- **BHHS SAGE CRM – powered by Salesforce**
- **Text, Lead Routing**
- **BHHS Analytics - Einstein Analytics/ AI**
- **BHHS SAGE Websites – Powered by Adobe Experience Manager**
- **BHHS Learn Center (Raven 360)**
- **BHHS REflex Integration/ App Exchange**
- **Project Elixir**

Syndication



Website & CRM



Marketing & Campaigns



App Exchange Partners



Transaction & Accounting



REflex Integration/ App Exchange

BERKSHIRE HATHAWAY
HomeServices
Georgia Properties

PROSPERITY
HOME MORTGAGE, LLC

WEISSMAN

HSA
HOME WARRANTY

210
HOME BUYERS
WARRANTY



Campaigns

Leads

Contacts

Opportunities (deals)

Closed Transactions

Business Generation

- Campaigns will be used to generate leads
- Lead Sources: SOI/COI, Geographical Farming, Phone-based prospecting, Online leads from 3rd party, FSBO, Expired, Open Houses, BHHS.com and more...

Engagement Plan

- Identify key criteria: Lead Source, Transaction Type, Lifestyle Interests, Ideal Close Date
- Optimize and automate the best course of action to qualify and move toward active sales opportunity

Active Sales

- Ideal Close Date is specified, contact has responded with interest from the engagement plan
- Moved to Active Sales Opportunity
- Track through the Sales Pipeline



WELCOME TO ACE!

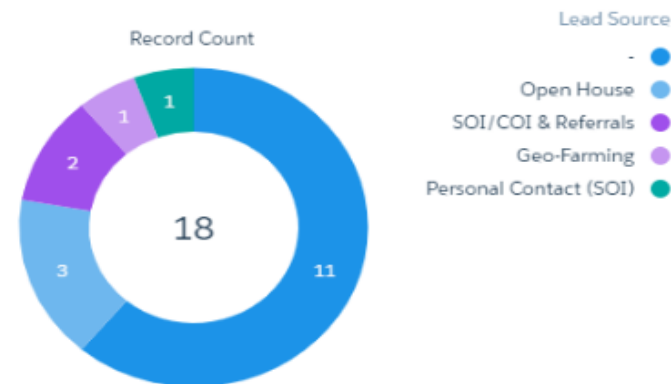
A place where you can easily manage all of your contacts, events and tasks!

ACE - Need to Contact List

First Nam...	Last N...	Phone	Mobile	Email	Last Act...
Chrls	Stuart	☎ -	☎ 91676873	chrlsstuart@hsfranchlse....	-
Irene	Investor	☎ 55555555!	☎ -	irene@irene.com	-
Jake	Sm1th	☎ -	☎ -	-	-
Lenny	Landlo...	☎ -	☎ 55555555!	-	-
Rlta	Renter	☎ -	☎ -	rlta@rlta.com	-
Sally	Seller	☎ -	☎ -	sally@seller.com	-

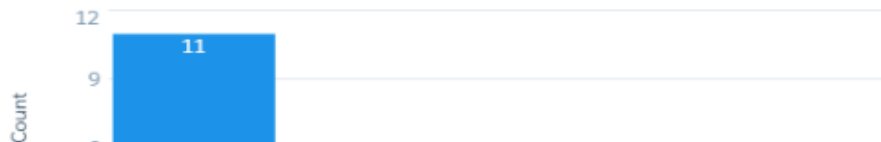
[View Report \(ACE - Need to Contact List\)](#)

Contacts by Lead Source



[View Report \(Agent CRM Contacts by Lead Source\)](#)

Agent CRM Contacts by Stage



ACE - Hot Prospects

First Na...	Last ...	Email	Phone	M...	Ideal Close ...
Billy	Buyer	-	☎ 55555555!	☎ -	1/31/2019
Jake	Sm1th	-	☎ -	☎ -	12/27/2018
Rlta	Renter	rlta@rlta.c...	☎ -	☎ -	1/31/2019



salesforce

Sneak Peek!

Salesforce CRM	Adobe Experience Manager Websites
<ul style="list-style-type: none"> • Team Functionality • Integrated Text Messaging • Lead Routing/ Text Response • Email Integration • Opportunity Module/ Sales Pipeline • Coaching Dashboards • Advanced Marketing Campaigns • Einstein Analytics/ AI/ Voice 	<ul style="list-style-type: none"> • Team Functionality • Full Agent Websites • Brokerage Websites • Advanced Analytics/ Lead Insights • Personalized REsource Center

