**✅ BoldTrail Contact Setup Checklist**

**Let’s make this easy for you - step by step.**

**Holly Fogel – The One Hour Coach**

**404-271-4999**

**www.theonehourcoach.com**

**🗂️ Organize Contact Status**

Assign each contact based on where they are in your client journey:

* 🔵 Sphere – know you, like you, not doing a transaction currently – are able to use and/or refer you to others
* 🟡 Prospect – you have not had any two way communication – trying to get them to respond to a text, email, or phone call
* 🟠 New Lead - you have not had any two way communication – trying to get them to respond to a text, email, or phone call
* 🔴 Active Lead – you have had two way communication and they are 0-120 days out – require systematized contact and proactive touches/interactions with relevant, valuable content regularly
* 🟣 Client
* ⚫ Contract
* ✅ Closed

**#️⃣ Add Hashtags**

Include appropriate hashtags to help segment and filter your database for smart follow-ups.  
*Examples:*

* #FirstTimeBuyer
* #Investors
* #OutOfTownBuyer
* #DogLover
* #Seminole
* #BusinessOwner
* #PastClient
* #buyer2025, #seller2020 – use deal type and year
* #Snowbird

**📈 Monthly Market Report**

* Add each contact to their local **monthly market report** to stay top-of-mind with value. Use city or zip code as the location, not a small neighborhood

**🎂 Birthday & Home Anniversary**

* Add **Birthday** and **Home Anniversary** dates in the contact profile.
* Turn ON **Birthday** and **Anniversary** statuses in the **Tile Settings**.

**🏡 Home Preferences**

Fill in the **Home Preferences** section:

* Current City location and Price range – for all closed and sphere contacts
* Beds/Baths – only if active buyer

**💬 Behavioral Alerts**

* Change default behavioral alerts (e.g., "viewed a property") to sound like an **automated response**, such as:  
  *“This is an automated update from my system—I noticed you viewed a property. Want to take a closer look? I’m here to help!”*

**📱 Social Tile**

* Connect all possible **social media profiles** under the Social Tile:
  + Facebook
  + LinkedIn
  + Instagram
  + Twitter
  + YouTube (if applicable)

**🚫 Turn OFF**

* **Listing Valuations** (if they don’t match your brand or strategy)
* Any C**ampaigns** that don’t fit your voice or message – less is better – I recommend you turn them ALL OFF to begin

**🎉 Turn ON**

* All relevant **Birthday** and **Home Anniversary** automations in your system.

**🔁 Set Annual Reminder**

* Create a **task for January 1st** to update:
  + Birthday message templates
  + Home anniversary message templates

**🧑‍💼 Present Templates**

* Update the default **Present** templates (CMAs, buyer packets, etc.) to align with your branding and tone

**Holly Fogel – The One Hour Coach Presents**

**15 Clicks To Thrive – CRM Success Simplified**

**Clicks 1-10 are non-negotiables – repeated 5 days per week – 60 minutes per day**

Clicks 1-5 “**Clear the Dash” *board***

1. **New Leads Tab** – follow up and clear when finished – this will reward your efforts or reinforce your decision to not generate online leads
2. **New Text Tab** – you have two; one here and one on your phone. Upload any information from your previous texts over the last 24 hours that pertain to your business.
3. **New Email Tab** – you have two; one here and one on your phone. Upload any information from your previous emails over the last 24 hours that pertain to your business.
4. **Hot Leads Tab**- follow up with all – make sure these have #hotter hashtag especially if they have received a behavioral alert message – review your messages and turn off for any individuals that should not longer receive.
5. **Drop-Down Tab – Email Events** – this will give you immediate feedback of who is opening which email and when. Make any follow ups necessary and then delete everything in each tab.

After completing 1-5 your dashboard should be empty. Leave any items in the tab until you have properly completed your follow-up for that subscriber. Once completed you should delete it from the dashboard.

As you open your store each day, the dashboard will provide you with instant feedback and will serve as your reward system from your efforts of the previous tactics you have implemented. Remember, the more conversations you have the homes you will sell -

**PERIOD**! Conversation Goal = # of desired transaction x 40

**For Example: 20 transactions = 800 conversations needed this year**

Clicks 6-10 **Coach in the Box – Conversations in Pipeline**

1. **Client/Contract Status Group** – start with your current clients first. Service all your buyers and sellers to the highest level. Are your seller clients on a weekly seller report and market report? Have you run the property boost, held an open house, called 15 SOI about this listing? Have you received a referral from this client – other new business? Follow the ROI listing tracker. Take an active role in your buyer clients search experience.
2. **Active Lead Status Group** – these are the folks that are 0-120 days out from working with you. What type of follow up do you have each of these folks on? Search alert, market report, campaign, buyer representation slide deck, phone calls, texts, reach out – you need 26 before they are likely to start actively engaging with you unless this was a referred opportunity.
3. **New Lead/Prospect Status Group** – these are all the online opportunities that have entered the platform electronically and indicate by this status that you have NOT yet had two-way communication. These statuses will remain until they either respond to an email, text, or logged phone call in the platform. Once they respond to one of your reach out efforts, the platform will automatically move them to the ACTIVE status, and you will be notified with a text message from the smart number. Your number one goal is to figure out timeframes so you can now follow up with the appropriate information to keep them a loyal subscriber.
4. **Closed status group** – time to nurture and gain more referrals! Use my Working vs. Waiting by Referral training strategies! Birthday, Home Anniversary, Market Reports, CMA Updates via email and video, New Listing to Sell Phone calls, 7-30-60 day follow up calls, specific email touches per commonalities, referrals GIVEN, handwritten note cards, etc! Earn your fair share of repeat and referrals by working my systems!
5. **Sphere status group** - time to nurture and gain more referrals! Use my Working vs. Waiting by Referral training strategies! Birthday, Home Anniversary, Market Reports, CMA Updates via email and video, New Listing to Sell Phone calls, 7-30-60 day follow up calls, specific email touches per commonalities, referrals GIVEN, handwritten note cards, etc! Earn your fair share of repeat and referrals by working my systems!

Clicks 11-15 are now developed from the Tactic List. Pick between 1 and 5 tactics per day and add those to a calendar that you can simply look down at while working your hour. Any repeatable tactic – such as deal of the week, Tuesday Shout Out, What is My Home Worth tab, etc. – can and should be repeated at least 8 times to effectively get a return on your effort. Put these on the calendar and execute!