Remember… "If it didn't happen in Follow Up Boss.. It didn't happen!"

GETTING STARTED:

AGENT KICKSTART: CLICK HERE for Agent Kickstart

MORE GETTING STARTED:

- **Customize your settings and get notified of important events**

  1. Click on your Initials/Image in the upper right-hand corner > My Settings to customize your signature, call settings, and more. Here is more information about each setting on the My Settings page.

  2. Click on the Bell in the upper right-hand corner > Settings Gear to customize your Notification Settings. We recommend enabling all notification types so you never miss a new lead alert or text reply from your contacts.

- **Download the app**

  We know you spend as much or more time in the car as you do in the office, so be sure to get the Follow Up Boss app on your phone (Android or iPhone)! Also, allow notifications so you don't miss a beat.

- **Add and organize your contacts**

  Import your current contacts via CSV or ask for help with your file(s) and we can import your contacts for you! You can include past clients, current leads, and anyone you might do business with.

- **Organize your contacts by the correct stage**
  -so you know who is who in your database (past client, sphere, closed, hot, etc.).

- **Start working your contacts**
  - Use Smart Lists to locate the contacts you need to follow up with
  - Watch this 2-minute video to see how to start your day with Follow Up Boss
  - Check your TASKS Daily

- **Be sure to update and verify:**
    - Stage as you identify the lead's timeline so you can easily prioritize your follow-ups. Change after any change with communication
    - Verify Source
    - Update Tags and use this to Organize
    - Correct Names
    - Also don't forget to log any important notes in FUB.
    - Verify every lead has a Ylopo STARS account and that STARS account is sent to the contact.

You will need to immediately add at least 10 contacts to your Follow Up Boss contacts. The goal here is to have a minimum of 100 contacts in first 30 days.

Ready to level-up? Here's our success training

If you ever need a quick refresher on the basics, check out our Follow Up Boss 20-minute Bootcamp.