

JOHN L. SCOTT



## JLS Engage Workshops

**Brokers who use JLS Engage are more likely to have an organized database and focus on activities that drive their business forward.**

Short, interactive workshops focused on a specific action are a great way to encourage brokers to use JLS Engage.

These small-group workshops can help each John L. Scott broker identify the parts of the system most valuable to them and most relevant to how they conduct their business.

This document includes several recommended workshops – from supporting first-time users to more advanced topics that are intended for brokers who are comfortable using JLS Engage.

### **Each workshop below includes:**

- Topic: A summary of the workshop's goal.
- Skill level. Beginner or Intermediate.
- Audience/prerequisites: Who is the workshop intended for? What should attendees know before joining the workshop?
- Recommended cadence: How often could this workshop be offered?
- Pre-Work: What tasks should attendees do prior to the start of the workshop?

### ***Are you offering your brokers a great workshop? Please share!***

We'd love to know how you plan to keep the momentum going – and share your wisdom with others.

### **Questions?**

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# Workshop: New users “Getting Started” session

**TOPIC:** Support with accessing JLS Engage for the first time.

**SKILL LEVEL:** Beginner.

**AUDIENCE/PREREQUISITES:** Brokers who have never logged into JLS Engage. When viewing the Office Leadership or Office Staff Users Report, these brokers show “-” in the “Last Login” column.

- See: [Click here for screen recording](#)

**RECOMMENDED CADENCE:** Bi-weekly. Suggestion: Host before sales meeting.


**PRE-WORK:** All brokers should bring MyDesk login credentials – username and password, as well as mobile app store credentials (Apple or Android).

- Best practice: Brokers should log in to MyDesk and app store **before** arriving for class so they know they have the correct passwords AND that they have MFA configured correctly.

**SUPPORT MATERIALS IN THE JLS ENGAGE RESOURCE LIBRARY:**

- [Click here for JLS Engage Resource Library section on this topic](#)

**CLASS FLOW:**

- Everyone accesses MyDesk
- Everyone accesses JLS Engage via MyDesk
  - ‘Log in with John L. Scott’
- Support with common computer settings upon first-time login to JLS Engage
  - For help with these, see:  [JLS Engage - Staff Supporting Brokers Guide](#)
  - Connect to Propertybase Services
  - Ensure email address is updated/accurate; facilitate change if not
  - Ensure email marketing tabs load; facilitate if not
- Everyone downloads and installs the JLS Engage mobile app and assist with login
- Next steps: Encourage broker to attend an upcoming JLS Engage training
  - If during rollout, there are regularly scheduled live Zoom sessions
  - Training sessions held in office – i.e. Stages workshop as first step.
  - Direct broker to JLS Engage Education Resource Library.

**If time allows, the second half of this class could be a short overview of JLS Engage:**

-Overview of the dashboard and dashboard widgets

-Contacts and how to use different list views

-The contact record and how to store information there

-Email marketing

-Basic tour of the JLS Engage mobile app.

# Workshop: Database Health Check

**TOPIC:** Use Engage Dashboard widgets to ensure complete database information.

- *The Dashboard Widgets 'My Database Stats' allow brokers to easily see the 'health' of their database: Contacts with and without mobile phone number, email address, mailing address, birthdate, as well as Property Tracker Account status.*

**SKILL LEVEL:** Beginner.

**AUDIENCE/PREREQUISITES:** Brokers who have contacts in JLS Engage and have already accessed JLS Engage at least once.

**RECOMMENDED CADENCE:** Bi-weekly.

**PRE-WORK:** None.

**SUPPORT MATERIALS IN THE JLS ENGAGE RESOURCE LIBRARY: "WIDGETS – MY DATABASE STATS."**

[Click here for JLS Engage Resource Library section on this topic](#)

**CLASS FLOW:**

- All users log in to JLS Engage.
- Explain goal of class is to focus specifically on the 'health' of everyone's database – this is time set aside for everyone to add data to their contacts.
- View the relevant Widgets on the Dashboard. Demonstrate clicking a 'slice' of one widget to view the underlying data.
  - Focus on one piece of information at a time – for example, Mobile Phone: Use the widget that shows contacts with and without Mobile Phone to ensure ALL contacts have a mobile phone number added.
  - For example, clicking the 'pink' piece of the 'Mobile Phone' widget to see those in the database without a mobile phone number listed.
- From the report that opens, demonstrate in-line editing.
  - SEE: [Click here for screen recording](#)
- The rest of the class is brokers using the Dashboard My Database Stats widgets to ensure all contacts contain as much information as possible.
- Next steps/ongoing work: Instructor should demonstrate how to quickly add a new contact using either the mobile app or desktop site – whichever they prefer. As well as how to review the My Database Stats widgets on a weekly basis to ensure no data is missing – there are no "Pink Pie Slices."

# Workshop: Building our book of business with Contact Stages

**TOPIC:** Update contacts with key Engage feature – Contact Stage. Compare and contrast Stages and Categories.

- Stages: *How soon will this contact transact?*
- Categories: *Qualitative information about the contact.*
- *In MyDesk, 'Categories' had to pull double-duty – it was the place you tagged contacts for both qualitative information and business information – that someone is a golfer AND that they are going to transact within the next 6 months. In Engage, Stages take over for tracking 'likelihood to transact'.*

**SKILL LEVEL:** Beginner.

**AUDIENCE/PREREQUISITES:** Brokers who attended a training session or have accessed JLS Engage.

**RECOMMENDED CADENCE:** Bi-weekly.

**PRE-WORK:** Enter any needed contacts into JLS Engage. If needed, brokers can bring a list of contacts for entry during class but this may slow them down.

**SUPPORT MATERIALS IN THE JLS ENGAGE RESOURCE LIBRARY: “WIDGET - INDIVIDUAL CONTACTS BY STAGE”:**

[Click here for JLS Engage Resource Library section on this topic](#)

**CLASS FLOW:**

- All users log in to JLS Engage.
- Quick review of dashboard and widgets and how easy it is to see pipeline of business – Stages widget on dashboard.
- Navigate to My Contacts list view and identify Stage column.
- Demonstrate in-line editing
  - SEE: [Click here for screen recording](#)
- Users update each contact's Stage so that none are in Stage “Lead Action Required” any longer.
  - Users also add dollar amount to Contact Record field “Pre-Approved For”.
- When all contacts are in a Stage, everyone visits their Dashboard (remember to Refresh). The 'Stages' widget/pie chart will update.
- Additionally, the instructor directs everyone to visit Contacts tab and change to list view “My Leads – A, B, C Stages” and then toggle on 'Kanban view'. This will show all users the total sales volume dollar amount above each Stage – the potential value of their pipeline in terms of production.
- Next steps/ongoing work: Instructor should demonstrate how to quickly place a contact in a Stage using the mobile app as well as the desktop site, and reiterate how important it is to do this so the brokers do not have contacts build up in the Lead Action Required Stage.

**Note - this workshop can also be used to cover other Dashboard widgets:**

-Database health – email addresses, phone numbers, mailing addresses

-Lead Sources, Relationship Contacts.

# Workshop: The JLS Engage Mobile App

**TOPIC:** Installation and basic use of JLS Engage mobile app

**SKILL LEVEL:** Beginner.

**AUDIENCE/PREREQUISITES:** Any broker who wants to learn about and use the JLS Engage/Salesforce mobile app.

**RECOMMENDED CADENCE:** Bi-weekly.

**PRE-WORK:** All attendees should bring their MyDesk credentials and mobile app store password.

**SUPPORT MATERIALS IN THE JLS ENGAGE RESOURCE LIBRARY: “DOWNLOAD THE JLS ENGAGE MOBILE APP”:**

[Click here for JLS Engage Resource Library section on this topic](#) including QR codes to download mobile apps.

## **CLASS FLOW:**

- All users download/install the JLS Engage mobile app – iPhone/iPad, Android.
- All users set up 'Today' app (bottom-left of mobile app menu).
  - SEE: [Click here for screen recording](#)
  - Allow calendar access, then select calendars to show in Engage mobile app.
- Review of mobile app menu items
  - Today bottom menu item – equivalent to a 'Mobile Dashboard'
  - Contacts bottom menu item
    - How to see all list views
    - Navigating to a contact record
      - Top action items: Call, Log Call, Send Text, 'More' and all items therein.
    - Tour of contact record (mirrors desktop site)
      - Categories
      - Neighborhood Campaigns
      - Sending email using Engage mobile app
      - Related menu – Notes, Files, and Action Plans attached to that contact.
      - Import a contact using your mobile phone
  - Tasks bottom menu item
  - “Menu” bottom menu item
    - “All Items”
      - This is where the other Engage 'apps' live – Notes, Files, etc.
  - Next steps: Discuss importance of using mobile app initiate all phone calls.
    - Why? Because when the call ends the app prompts the user to Log the Call (type a short note to summarize the call). The next time the broker calls this contact, they will have easy/fast access to this previous call to pick up the conversation right where they left off.

# Workshop: Top Clients (i.e. Top 10) organization & call night

**TOPIC:** A) Ensuring Top 10 Contacts exist in JLS Engage; adding them if not. B) Calling Top 10 and logging calls, following up by creating an action item based on each call.

**SKILL LEVEL:** Intermediate.

**AUDIENCE/PREREQUISITES:** Brokers who attended a training session or have accessed JLS Engage already.

- Note: While having the Top 10 contacts in Engage already is helpful, it is not required; brokers can add these clients during the class if needed.

**RECOMMENDED CADENCE:** Monthly.

**PRE-WORK:** Enter Top 10 contacts into Engage prior to the workshop OR bring them for entry during class – but they should already be entered into broker's mobile phone for easy upload to the JLS Engage Mobile App.

**CLASS FLOW:**

- Everyone logs in to JLS Engage – desktop and mobile app.
- Everyone ensures their Top 10 contacts exist in Engage.
  - If not, those Contacts are to be created now.
  - Use a Category to designate Top 10 – “Top” or “Top 10” depending on how specific the user wants to be about the number.
    - Important: Broker should use this same Category on each Contact they consider to be in their “Top” list...
- Everyone calls their Top 10 contacts and logs the summary of each call using ‘Log Call’.
  - Instructor points out that the next time the broker goes to call this contact, they can view the ‘Recent Activity’ section of the Contact record in Engage in order to see the note they save today; allows the broker to pick up the next conversation seamlessly with the client!
- Additionally, as calls are made everyone updates other relevant Engage items – Stage, contact information, email campaign subscriptions, Property Tracker accounts, Important Dates...

# Workshop: Neighborhood Campaigns in JLS Engage

**TOPIC:** A review of Neighborhood Campaigns and a practical application in both the desktop and mobile app versions of JLS Engage.

- *Neighborhood Campaigns is a great JLS-exclusive tool that allows a broker to quickly and easily set up a Contact to receive weekly listing activity emails and the monthly Market Insights report for micro-level neighborhoods – one or several. Previously, this feature required the broker to login to MyDesk to use it; JLS Engage makes accessing Neighborhood Campaigns extremely fast and easy.*

**SKILL LEVEL:** Intermediate.

**AUDIENCE/PREREQUISITES:** Brokers who have accessed JLS Engage previously AND who have contacts in JLS Engage.

**RECOMMENDED CADENCE:** Bi-weekly.

**PRE-WORK:** None.

**CLASS FLOW:**

- Everyone logs in to JLS Engage – desktop and mobile app.
- Instructor reviews the Neighborhood Campaigns tool.
- What is Neighborhood Campaigns?
- What are a few examples of when a broker would use Neighborhood Campaigns?
  - Broker meets neighbor at an open house. Broker asks “would you like to receive an occasional email with real estate activity in your neighborhood?” Broker enters Contact to JLS Engage and incubates as future seller client.
  - Broker is working with buyer client who has no specific search criteria or location. Neighborhood Campaigns can help this client get a high-level overview of what's happening in several different neighborhoods they are considering or curious about.
- Instructor shows how easy it is to locate and use the Neighborhood Campaigns feature in JLS Engage.
  - SEE: [Click here for screen recording](#)
  - Mobile App and Desktop site: Find it on every Contact record.
  - Desktop only: Also available as a tab in the top navigation bar (for viewing map/polygon as well as current recipients).
- Instructor gives time for brokers to go through database and add Contacts to any relevant Neighborhood Campaigns. Instructor should explain that the 'Welcome to Neighborhood Updates' email is sent to the contact as soon as the broker selects the Neighborhood in JLS Engage.
- Instructor demonstrates for brokers how to submit a new Neighborhood to Broker Care so it can be included in Neighborhood Campaigns.
  - [Click here for screen recording.](#)
- Instructions available at <https://brokercare.johnlscott.com> (Submit a Request→Neighborhood)

# Workshop: Home Anniversary, report & call/video message night

**TOPIC:** Deep-dive into past client relationship management via Home Anniversary/Important Dates.

**SKILL LEVEL:** Intermediate/Advanced).

**AUDIENCE/PREREQUISITES:** Brokers who attended a training session or have accessed JLS Engage already. **Note:** While having the past clients/contacts in Engage already is helpful, it is not required; brokers can add past clients during the class if needed.

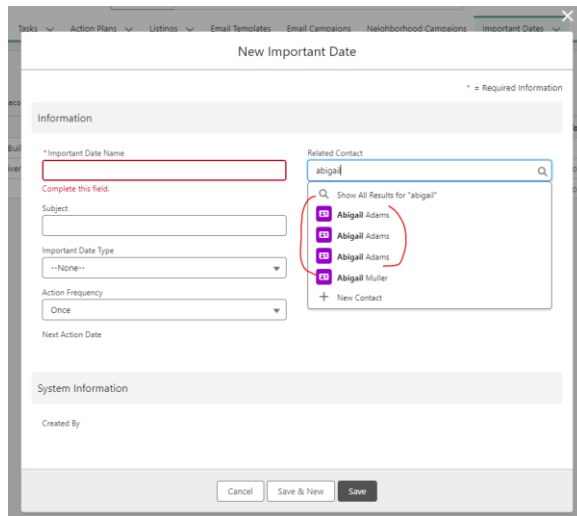
**RECOMMENDED CADENCE:** Monthly. Suggest dropping off pop-by gift morning of, or day before call.

**PRE-WORK:** Enter past clients into Engage prior to the workshop OR bring them for entry during class – but they should already be entered into broker's mobile phone/phone contacts.

## CLASS FLOW:

### PART ONE – Past Clients in JLS Engage.

- All users log in to JLS Engage – desktop and mobile app.
- All Past Client contact records created in Engage.
  - Use the “Past Client” stage or check box to identify past clients.
    - Adding to Stage: Past Client will also check the ‘Past Client’ check box. In the future, if the contact moves to a different Stage, the ‘Past Client’ check box will remain checked. The ‘Past Client’ list view is filtered on the check box.
  - Add additional details to the contact record if desired, i.e. Categories.
  - Instructor demonstrates how to navigate to Important Date feature on a contact record (*Related* menu on the contact record – desktop and mobile app)
    - NOTE: Important Dates can also be created using the ‘Important Dates’ app/item in the Engage navigation bar. **However**, when using this method it isn't possible to differentiate between two contacts with the same name. For example:





## (Continued...) Workshop: Home Anniversary, report & call/video message night

### PART TWO - Running and subscribing to the Home Anniversaries report.

- Click the 9-dots menu at upper-left.
- Click 'View All'
- Click 'Reports'
- Find and open the report titled "Home Anniversaries – This Month and Next."
- Click 'Run' to run this report.
- Select the star to 'Favorite' the report.
- To get automatic delivery of this report: Select the downward triangle next to edit and select 'Subscribe.'
- Pick the frequency for delivery of this report to you:
  - *Suggested:* Monthly, **Frequency:** Relative, **When:** Last, Monday.

### PART THREE

- Using the "Home Anniversaries – This Month and Next" report, everyone calls their past clients with an upcoming Home Anniversary and logs the summary of each call using 'Log Call'.
  - *Best practice:* Initiate calls to contacts from the JLS Engage mobile app; upon ending a phone call, the 'Log Call' screen automatically displays!
  - Instructor points out that the next time the broker calls this contact, the broker can view information about the contact and the broker's recent interactions with them prior to making the call. *This allows the broker to pick up the next conversation seamlessly with the client, and is one of the true powers of JLS Engage/Salesforce.*
    - The mobile app's 'Recent Activity' panel – swipe up from contact record.
    - The desktop site's right side panel under "Log Activity."
    - The 'Related' tab on the Contact record in Engage to see the important date they created today.
  - Additionally, as calls are made everyone updates other relevant pieces of the past clients' contact record in JLS Engage: Stage, contact information, email campaign subscriptions, Property Tracker accounts, other Important Dates...any other data that will inform the broker's next conversation with their client.