

| Agent CRM Training





MEET THE HOST

Leslie Brt-Thomas
CUSTOMER SUCCESS MANAGER

CHIME SUPPORT

Call 1 (855) 981-7557

Support@chimeinc.com

9:00 am - 8:00 pm (Mon-Fri)

9:00 am - 6:00pm (Sat/Sun)

Eastern Time



Leslie Bert- Thomas



AGENDA

Agent CRM Setup

- Dashboard
- Help Center
- CRM Settings

Open Q&A (if time remains)

Next Steps and Takeaways

2. Agent Subdomain & Campaigns Tab

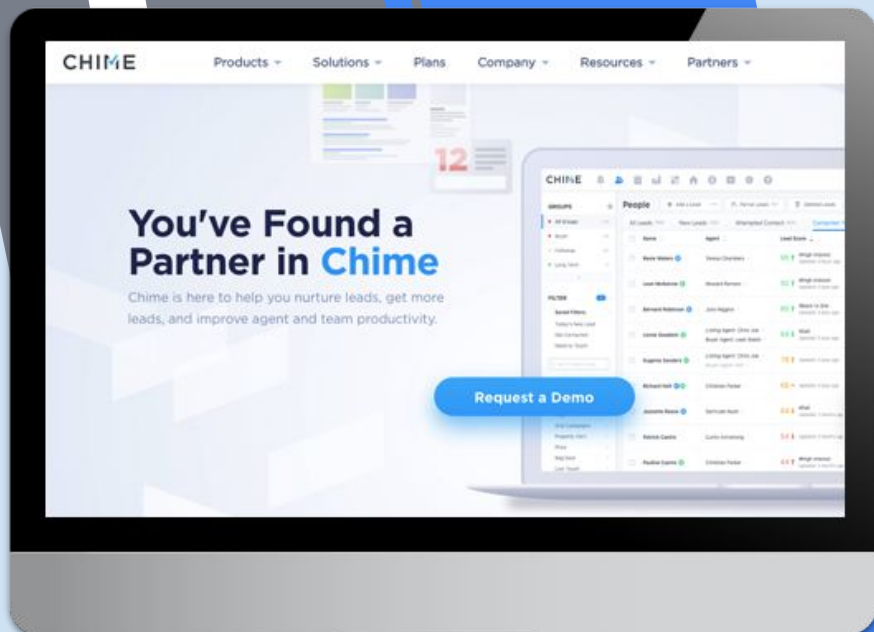
Training

3 Uploading

Contacts/Integrations/Smart
Plans/Discovery Listing

4. Agent Marketing Tools & Tips

(Landing Pages/Lead Generation)



LIVE DEMO



12

CHIME [Notifications] [Profile] [Home] [Settings] [Help]

GROUPS

- All Groups: 2763
- Buyer: 808
- Followup: 867
- Long Term: 22

FILTER

Saved Filters:

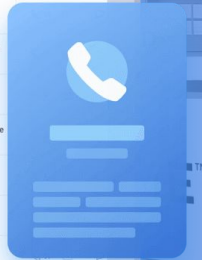
- Today's New Lead
- Not Contacted
- Need to Touch

Search Property/Area

Agent & Assistant
Lead Type
Source
Tags
Drip Campaigns
Property Alert
Price
Reg Date
Last Touch

People + Add a Lead ... Partial Leads 164 Deleted Leads

All Leads	New Leads	Attempted Contact	Contacted	Nurturing	Hot	Closed
7890	1385	3410	1091	859	650	815
Name	Agent	Lead Score	Contact Info	Communications		
Roxie Waters	Teresa Chambers	95 ↑ #High Interest Updated: 2 hours ago	ansel_hessel@karlie.org 789-045-3568			
Leon McKenzie	Howard Romero	92 ↑ #High Interest Updated: 3 days ago	julien_morissette@yahoo.com 708-901-5350			
Bernard Robinson	Julia Higgins	85 ↑ #Back to Site Updated: 3 days ago	devan.kessler@gmail.com 955-825-7646			
Linnie Goodwin	Listing Agent: Chris Joe Buyer Agent: Leah Walsh	84 ↓ #Sell Updated: 3 days ago	stroman_stefanie@bertram.me 500-428-0111			
Eugenia Sanders	Listing Agent: Chris Joe Buyer Agent: N/A	78 ↑ Updated: 3 days ago	davion_stehr@hotmail.com 047-872-0362			
Richard Holt	Christian Parker	66 → Updated: 3 days ago	jalyn_luettgen@gaylord.biz 164-289-4199			
Jeanette Reese	Gertrude Nash	64 ↓ #Sell Updated: 2 months ago	watrica.guy@yahoo.com 735-597-1168			
Patrick Castro	Curtis Armstrong	54 ↓ Updated: 2 months ago	annabell_rove@velda.biz 609-872-7503		6	15
Pauline Castro	Christian Parker	44 ↑ #High Interest Updated: 3 months ago	nlenow_lane@yahoo.com 820-476-6833		3	7





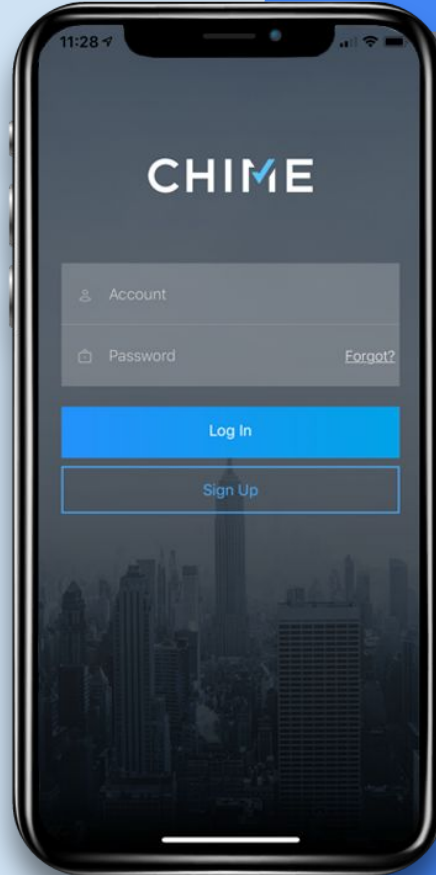
NEXT STEPS & **TAKEAWAYS**

- Setup Your Agent Profile & Preferences
- Setup Integrations

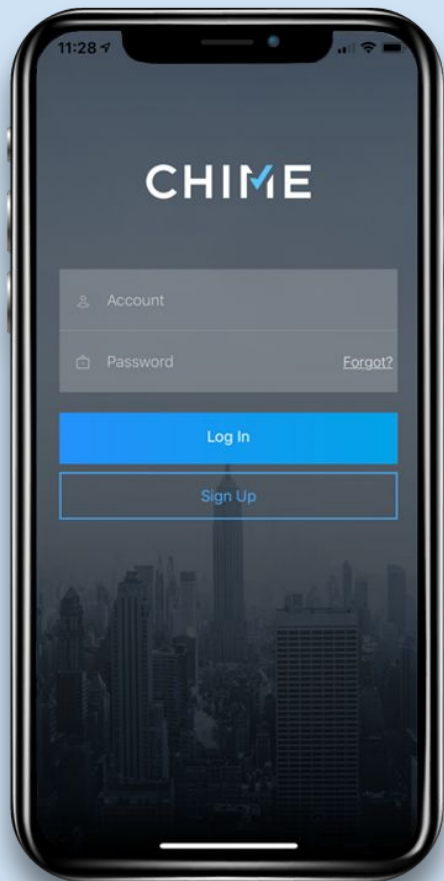
- Download The Chime App

- Watch Video for next Training

https://www.youtube.com/watch?v=L_V53ovzxRRs



RESOURCES



[CHIME HELP CENTER](#)

CHIME's searchable database includes articles, training videos, and step-by-step instructions

[VIDEO TRAINING](#)

Chime Core Feature CRM Training

[CHIME USER FORUM FACEBOOK GROUP](#)

Chime's Official User Group. A place to collaborate and discuss general real estate topics as well as those related to the Chime platform.

**Please do not submit any support tickets here. This group is for agents to network with other CHIME users, share best practices and ask functionality questions

[SIGN UP FOR A CHIME WEBINAR](#)

[Getting Started With CHIME](#)

[CRM Training](#)

[Agent Training Website](#)

[Smart Plans & Property Alerts](#)



Q&A Session



You will receive a recording of this training within 24 hours.