SISU Process

1. SISU is a KPI and analytics technology the team utilizes
2. Multiple team members are involved in the data collection process and have specific responsibilities to ensure the data has integrity to it at all times
3. Data syncs between Sierra and SISU
4. https://www.loom.com/share/ff92526e2e3440b3b3c0408a5714af88
5. When an appointment is set:
    a. These steps are completed by the person that set the appointment (ISA or agent typically)
    b. Tag the lead "SISU Appt Set" (this is in addition to the CRM processes for appointment setting)
    c. Wait about 1 minute
    d. Go to https://my.sisu.co/auth/login and login
    e. If you don't have an account request one by emailing Ryan
    f. Go to "My Transactions" in the top right
    g. Find your lead you set the appointment with, use the "filter" tool if needed to locate them
    h. Click "edit" on the lead
    i. Fill out the Buyer or Listing Appointment Set form
    j. Click "Send Form Data" and send to all admins
    k. Copy and paste that information directly into the clients profile in Sierra, using the note function, and check the boxes to "Notify All"
    l. https://www.loom.com/share/49d693df41444e03a2d8294a4e8221a5
6. When an appointment is met:
    a. These steps are completed by the agent
    b. Locate the client in Sierra
    c. Tag the client "SISU Appt Met"
    d. If signed, also complete #6 below
    e. https://www.loom.com/share/b01a6e83eeb249bc82889b42ba47312e
7. When a client is signed:
    a. These steps are completed by the agent
    b. Locate the client in Sierra and tag them "SISU Client Signed"
    c. Locate the client in SISU
    d. Click edit
    e. Fill out the form Buyer or Listing Signed
    f. Click "Send Form Data" and send to all admins
    g. Click "Send Form Data" and send to all admins
    h. Copy and paste that information directly into the clients profile in Sierra, using the note function, and check the boxes to "Notify All"
    i. https://www.loom.com/share/d9484d66e17c4381b95a15afcbc424ac
8. When a client goes under contract:
    a. These steps are completed by the agent

    b. Locate the client in Sierra and change their status to pending
    c. Remove the action plans
    d. Locate the client in SISU
    e. Click edit
    f. Fill out the form Buyer or Listing Pending
    g. Click "Send Form Data" and send to all admins
    h. Click "Send Form Data" and send to all admins
    i. Copy and paste that information directly into the clients profile in Sierra, using the note function, and check the boxes to "Notify All"
    j. https://www.loom.com/share/4dd252f6544a4660a4c53109ace06023
9. Updating the file:
    a. This step is done by the transaction coordinator
    b. Update the home inspection company, the lender, the title and escrow companies as needed
10. Commission Form process:
    a. This step is done by the transaction coordinator
    b. Once notified of the pending
    c. Locate the client in SISU
    d. Click edit
    e. Chose the commission form and fill it out
        i. Note the person who set the appointment as an additional agent on the transaction
        ii. Fill out the commission details, looking at the lead source
        iii. For buyers, the admin fee and marketing fees come off the top
        iv. The ISA commission or appointment set commission comes off the buyers agent side post split
        v. Wait for the appraisal to come back
        vi. Once finalized, make any final edits to the commission form
        vii. Click "Certify for Payment"
        viii. https://www.loom.com/share/676120e26aca4ec187371f1080fe3f3b
11. Commission payout process
    a. This step is done by the chief of operations
    b. The purpose of this step is to pay out commissions in alignment with typical check issuance dates
    c. Go to transactions
    d. Filter the data by close date, choose the dates of the check period
    e. Print and include with checks that are submitted for signature
    f. https://www.loom.com/share/a8a4f2e8727043a1bc0e1081a11aa11c
12. Payment received
    a. This step is done by the chief of operations
    b. The purpose of this step is to record when payment is received
    c. Payment could be received via direct deposit or check from escrow
    d. The chief of operations books the deposit to QBO (see Financial Process)

    e. Locate the client, enter the date the payment was received
    f. https://www.loom.com/share/a8a4f2e8727043a1bc0e1081a11aa11c
13. Dialer data
    a. This step is done by the chief of operations
    b. The purpose of this step is to enter in the dials into SISU to have accurate prospecting data
    c. Each Monday, before 9am, go into Sierra
    d. Go to Dialer Dashboard in the right corner when you click the gear icon
    e. Change the dates to the previous week, starting on Monday, ending on Sunday
    f. Change the view to view all
    g. Copy and paste this data including names into the Google Drive document titled "Dialer Date Dump"
    h. Enter the new dates matching the format in column A and column B
    i. Paste in the data
    j. Paste in the word "Go" in column M to transmit the data into SISU
14. SISU Reports
    a. https://www.loom.com/share/fccdbb18a3844cd48248315399d19b4e