

Brivity Jumpstart Checklist

Step 1: Import your contacts
(if you've already done this, you're on your way!)

- [Best practices on importing](#)
- [Import your database](#)

Step 2: Lead Source Integrations

Send leads to [Brivity via email for:](#)

- [Realtor.com](#)
- [Dave Ramsey ELP](#)
- [Send Zillow Leads to Brivity](#)
- Contact support for other lead sources

Use [Zapier.com](#) for:

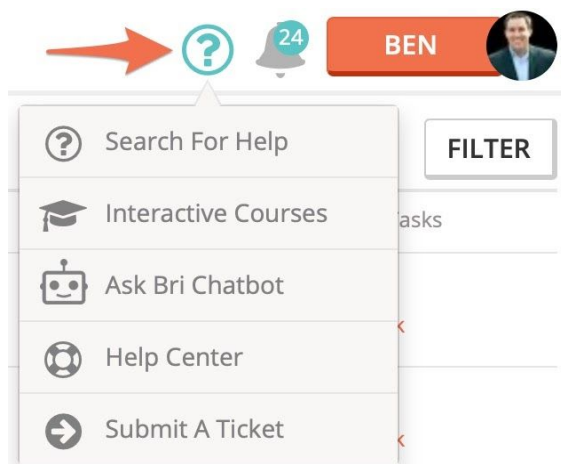
- Sending new leads to Mailchimp
- Sending new leads to BombBomb
- [Use Zapier email parsing](#)

Use [PieSync](#) for:

- Use [PieSync to integrate other systems](#)
- [Use PieSync to integrate KW Command](#)

Step 3: Brivity Interactive Courses

Click on the blue (?) in the upper right of your account to find help, courses and more!



Step 4: Set up automations

Automate Distribution

- [Route incoming leads](#) to agents

Use [Auto Plan Triggers](#) for new leads

- Brivity IDX Leads
- Realtor.com
- Zillow.com
- All other incoming lead sources

Step 5: Setup automated reports

[Set up Listing Alerts](#) for:

- Buyer Leads

[Set up Market Reports](#) for:

- Past Clients
- Sphere
- Sellers

This step will bring your database alive!

Step 6: Follow the [10 Actions to Success](#)

- ONE- Work New Leads
- TWO- Work Priority 1 Tasks
- THREE- Work Recent Website Visitors
- FOUR- Recent Market Report Viewers
- FIVE- Work Hot Leads
- SIX- Who Needs Listing Alerts?
- SEVEN- Who Needs Market Reports?
- EIGHT- Review Incoming Messages
- NINE- Work Past Clients
- TEN- Have a Plan for Watch and Nurture Leads

The 10 Actions of Success are easy using [Smart Filters saved in your account!](#)

Step 7: Join Bob & Ben live for advanced classes and training! [Mastery.Brivity.com](#)

Search our [Help Center](#) or [submit a ticket](#).

Want to talk now? Call us at (855) 427-4848

Brivity Office hours: Monday-Friday 7am-5pm Pacific Time