NORTHEASTERN UNIVERSITY

FINAL RECOMMENDATIONS

TAYLA ANDRE'S NON-REAL-ESTATE SERVICES

TEAM 1

Dec 1, 2025

CLIENT DIRECTION

* Use the existing BoldTrail platform
* Prefer simple system configuration, automation, and training over custom development
* Replace manual steps with Smart Campaigns, calendar rules, task automation, pipelines, and analytics
* Achieve a clean setup that team can run every day with consistency, quality, and privacy controls.

WHY?

* **Automation** - New leads move from website/event forms to booked calls
* **Targeting** - All follow ups are BoldTrail tasks with clear owners and due dates.
* **Consolidated dashboards** - Capture volume, time to first touch, show rate, decision rate, event-to-consult conversion.

SERVICES IN SCOPE

FAMILY WEALTH CONSULTANCY
2-SESSION VIRTUAL PATH

SESSION 1

DISCOVERY,
GOALS,
CONSTRAINTS,
DATA CAPTURE.

SESSION 2

OPTIONS,
CLEAR YES/NO DECISION,
NEXT STEPS WITH
CHECKPOINTS.

- 2 one-on-one virtual sessions with homework between.
- End-to-end home-buying education: pre-shop prep to post-purchase setup and financia literacy.
- Protection planning: insurance, estate basics, emergency fund, maintenance plan.
- Long-term view: retirement, investing, taxes, college funding, benefits, tradeoffs.
- In BoldTrail, we get fast virtual pipeline using forms, tags, reminders, scheduling links and other automated features.

SERVICES IN SCOPE

FAMILY ACADEMY COHORT

Small group, hybrid, 4–8 hours per month

Purpose: Education and community engagement

Output: Each family gets 1 page budget, affordability band, and a "Next 5 Steps" card.

Funnel: 25–30% of graduates book a 2 session Wealth Consultation within 30 days.

Sample: 2 hour in person session (workshop, discussion, Q & A) on themes "best use of savings."

In BoldTrail, we get event schedules, attendance, group messaging using tags and tracking enrollment, attendance, completion surveys for satisfaction, referrals.

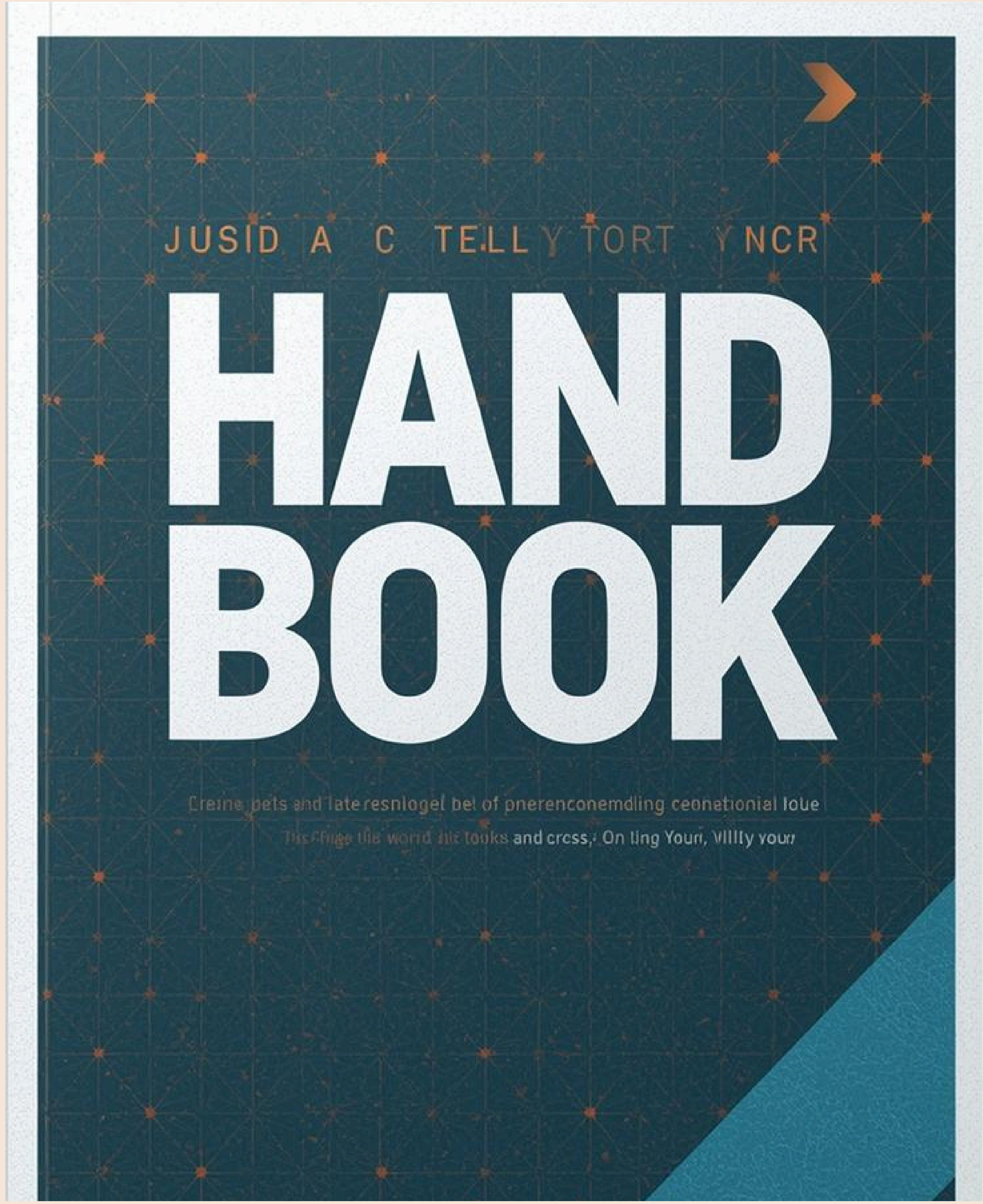
SPEAKING & HOSTING

- Business to business pipeline serving employers, unions, community groups
- 60 minute Lunch & Learn sessions on budgeting, credit repair, down payment programs, the "tour to keys" playbook, + Q and A
- Events are funnel to Wealth consultations & Cohort enrollments
- Events include co-branded RSVP page, automated reminders, limited consultation vouchers, and post event surveys.

OPERATING MODEL – IDEA & OBJECTIVES

PDF: **BoldTrail Standard Operating Procedures Handbook**

- Run both services inside BoldTrail using standard components.
- Forms capture leads from website and events into contacts with tags
- BoldTrail creates & updates contact, applies tags, and starts right automated messaging.
- Calendars let interested candidates book Sessions.
- Pipelines move people through stages which trigger next messages and tasks.
- Dashboards show booking, show rates, and results so team can tune copy and training.



OUTCOMES

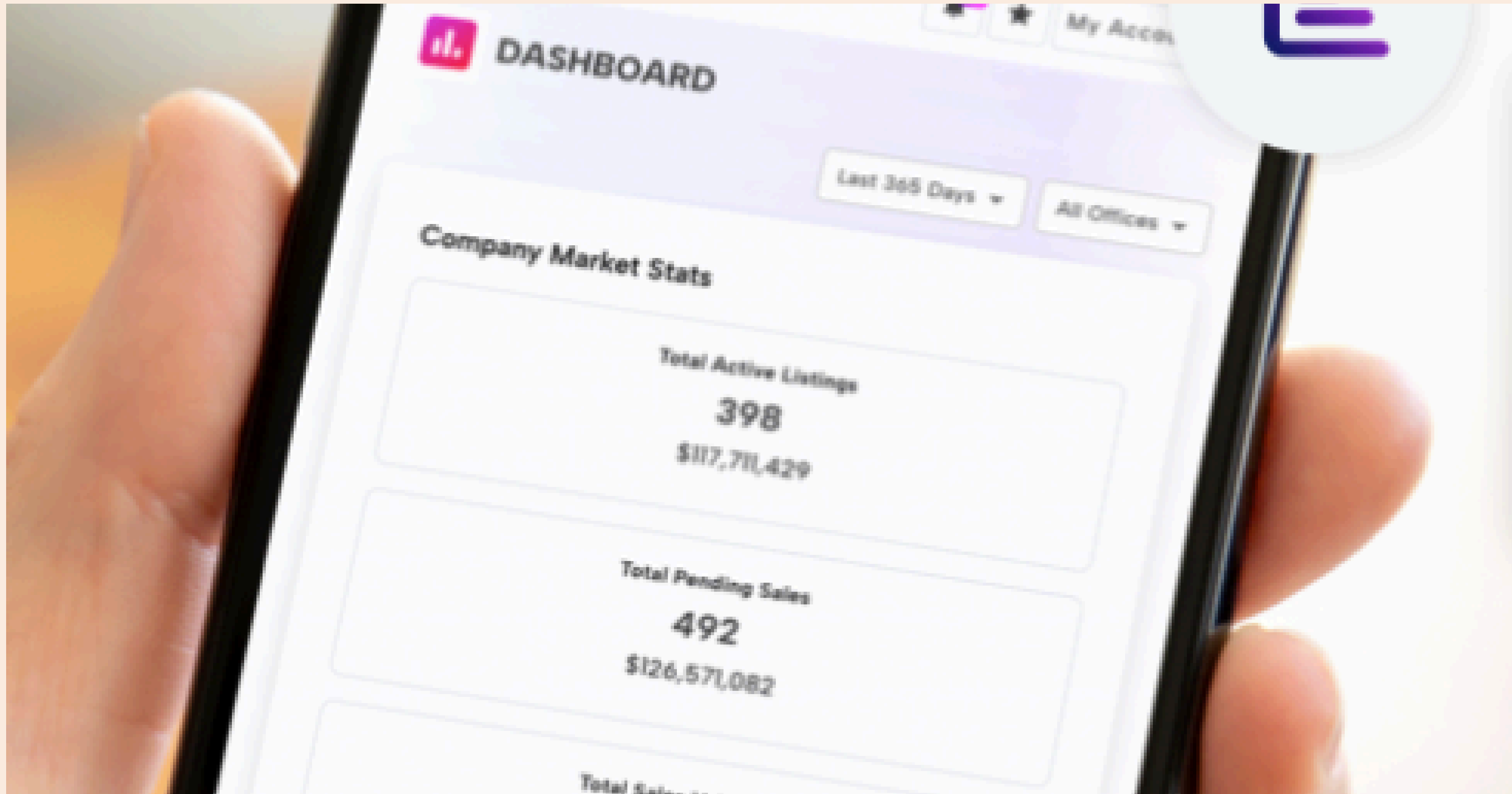
- Fewer manual steps for team
- Faster booking for Sessions
- Clean data and clear weekly dashboards.
- Repeatable path from first contact to decision, and partner rebooking.

FEATURES USED

- **Smart CRM:** contacts & companies in one place + activity timeline.
- **Tags and required fields:** clean routing and reports.
- **Smart lists and filters** by Service, Stage, Source, Partner
- **Forms & landing pages:** capture leads with consent + auto tags.
- **Appointments and calendars:** S1 and S2 booking links, confirmations, reminders.
- **Pipelines and stages** trigger next message or task.
- **Smart campaigns:** reminders, no shows, reactivation, rebooking.
- **Templates/snippets** cut typing time + maintain tone
- **Dashboards** show pipeline aging and weekly trends.
- **Consent and unsubscribe** keep messaging compliant

TARGETING RULES

- Cohort interest targeting
- Partner based personalization
- Shared tag dictionary
- Reusable Smart Lists
- Accurate analytics
- Single stage rule
- Smart Lists on campaigns
- Friday root cause review



SHARED DATA MODEL AND TAG TAXONOMY

Standard list of tags used by all

Tags drive routing to the right pipeline

Keep data clean, consistent, and easy to search

Help in Campaign targeting, Reporting and dashboards

Use short, consistent tag names - One idea per tag

REQUIRED FIELDS ON EVERY CONTACT First name, Last name, Email, Phone & 1 tag at least

CORE TAGS ON NEW CONTACTS

- **Interest/Service** – what they want - Examples: Service_FamilyWealth
- **Persona** – who they are - Examples: Persona_Client
- **Source** – where they came from - Examples: Source_Website
- **Consent** – can we message them - yes/no
- **Stage** – where they are right now - Example - Stage_Captured
- **Temperature** (how ready): Cold, Warm, Hot

OPTIONAL STICKERS

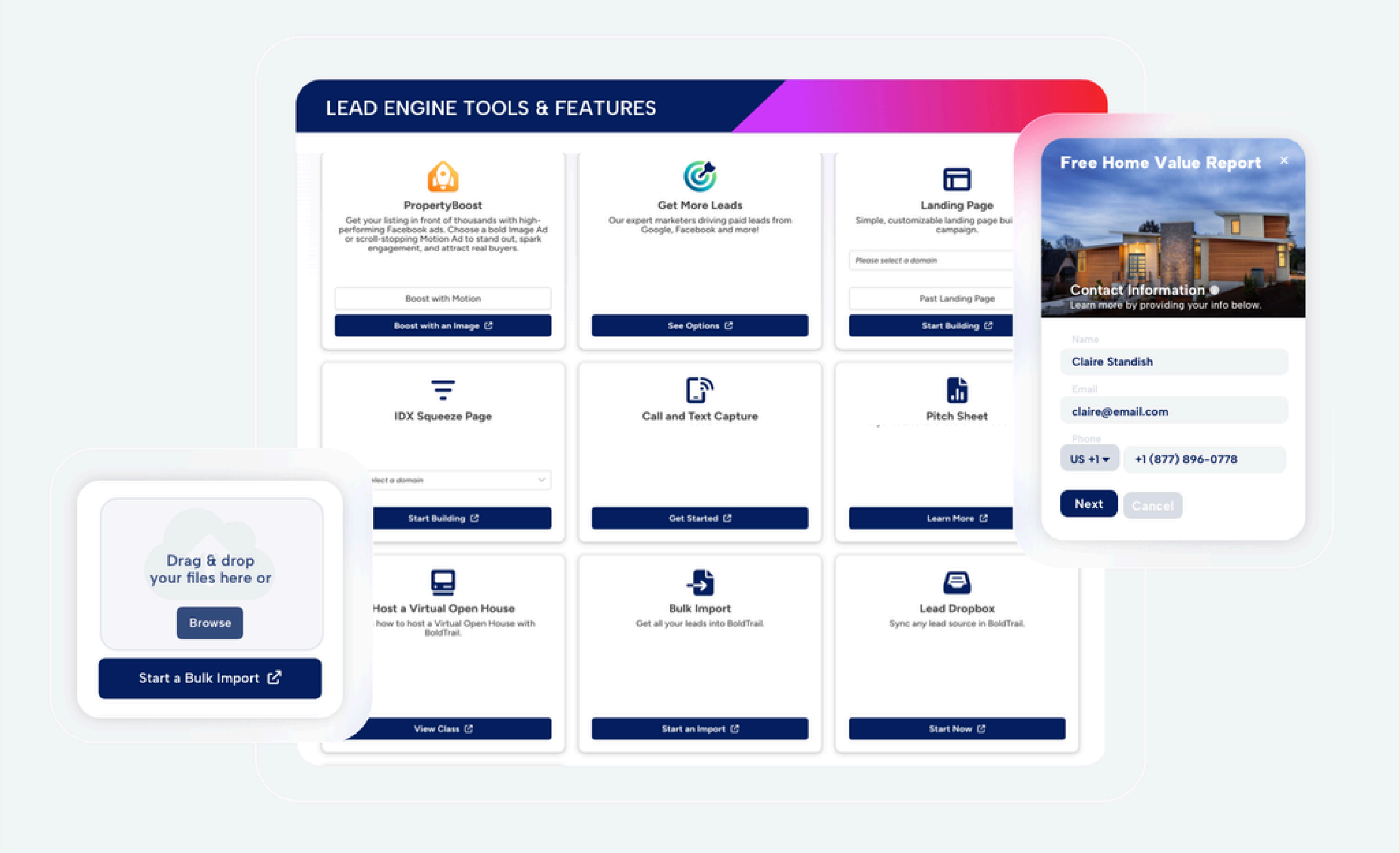
- **Preferred channel**: Pref_Text, Pref_Email
- **Language**: Lang_English, Lang_Spanish
- **Cohort interest**: Cohort_Interested_Yes
- **Partner name for Speaking and Hosting**

Example - Speaking and Hosting form Tags -
Service_SpeakingHosting, Persona_Attendee, Source_Event, Consent_Yes, Partner_UnionABC, Stage_Captured

QUICK TAG TAXONOMY

CATEGORY	EXAMPLE TAGS	PURPOSE / AUTOMATION EFFECT
SERVICE	SERVICE_FAMILYWEALTH, SERVICE_SPEAKINGHOSTING	ROUTES TO SERVICE-SPECIFIC PIPELINES AND CAMPAIGNS
PERSONA	PERSONA_CLIENT, PERSONA_ATTENDEE, PERSONA_PARTNER	PERSONALIZES NURTURE AND SELECTS JOURNEY
SOURCE	SOURCE_WEBSITE, SOURCE_EVENT, SOURCE_REFERRAL, SOURCE_MANUAL	ATTRIBUTION AND CHANNEL PERFORMANCE
CONSENT	CONSENT_YES, CONSENT_NO	GOVERNS EMAIL/SMS AUTOMATIONS AND OPT-OUTS
STAGE	STAGE_CAPTURED, STAGE_S1_SCHEDULED, STAGE_S2_SCHEDULED, STAGE_DECISIONPENDING, STAGE_DECISIONMADE	DRIVES REMINDERS, TASKS, AND PROGRESSION
OPTIONAL	PREF_TEXT, PREF_EMAIL, LANG_ENGLISH, LANG_SPANISH, COHORT_INTERESTED_YES, PARTNER_UNIONABC	PREFERENCE HANDLING, LANGUAGE

4. AUTOMATING ADMINISTRATIVE TASKS

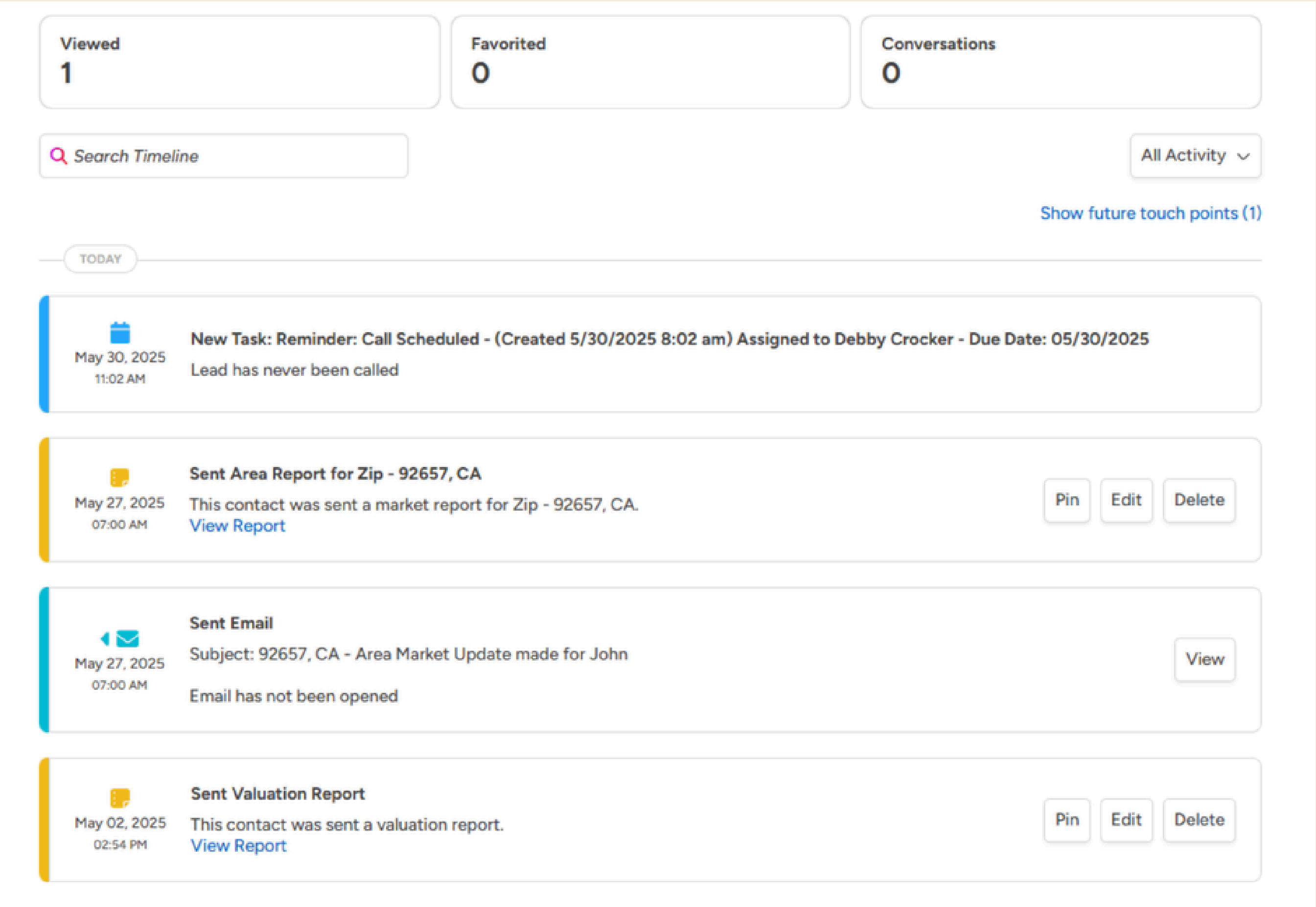


Lead Nurturing

Why:
No missed follow-ups
Structured journey → higher engagement

How:
Automation → Workflow → Trigger: New Lead
Action: Send Email sequence
Add delays (2 / 4 / 7 days)

Tool Name: Lead Engine Tool



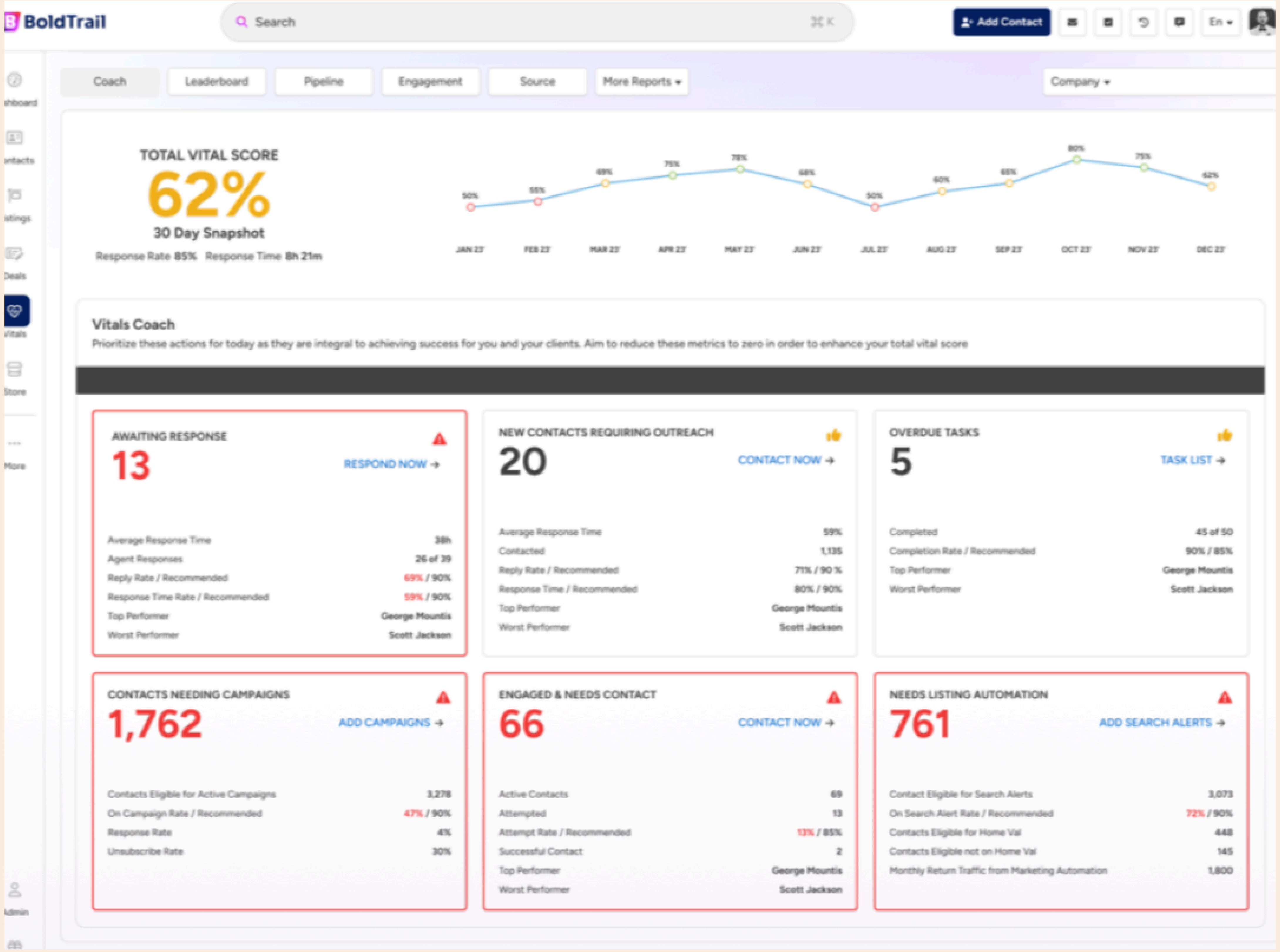
Task Management

Why:
No manual tracking
Follow-ups never slip

How:
Tasks → Automation Rule
Trigger: Stage change / contract ending
Action: Assign task + reminder

Link:https://help.insiderealestate.com/en/articles/4619572-boldtrail-contact-record-overview

Reporting, Dashboards, Segmentation



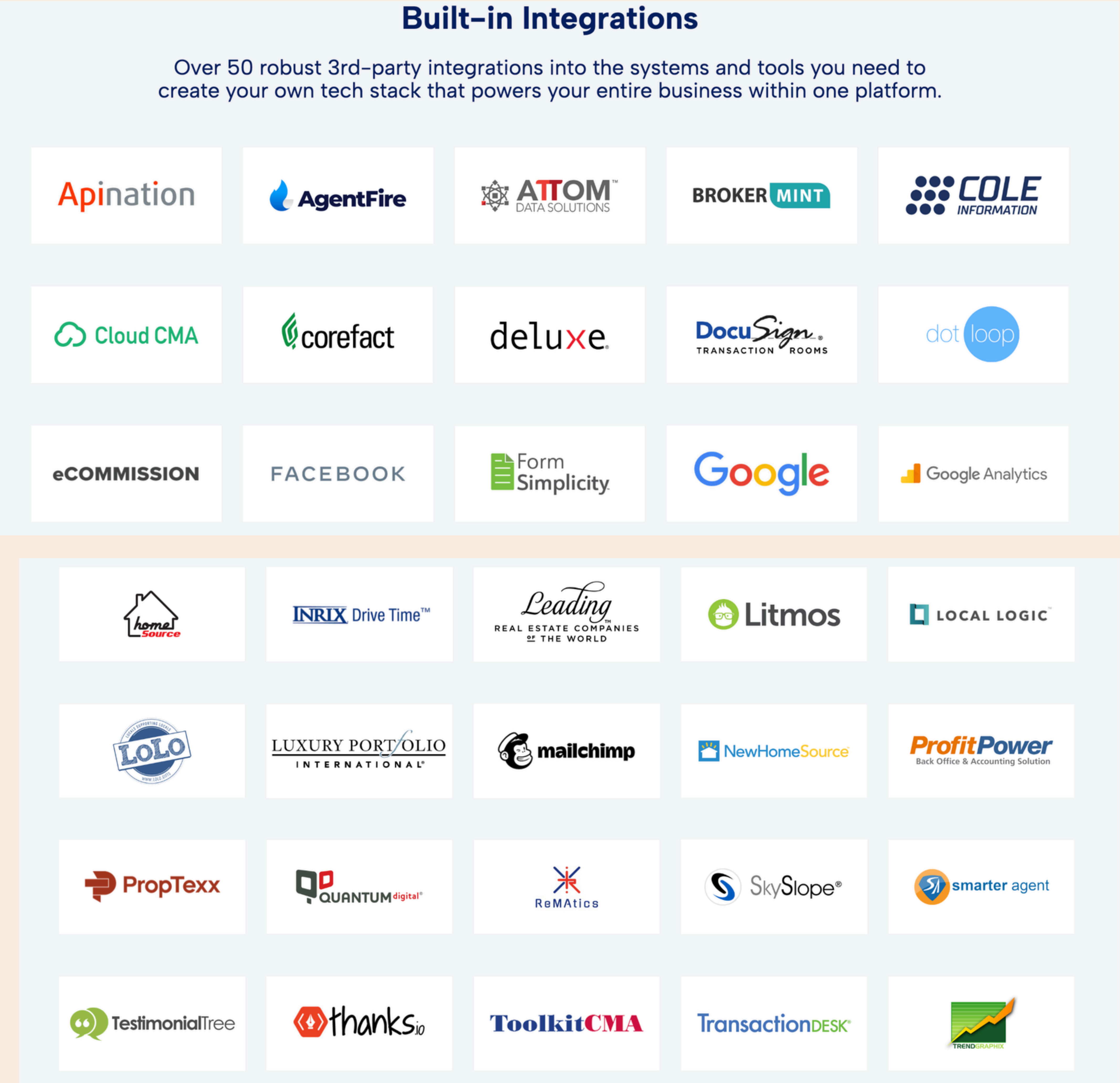
Why:
Real-time visibility
Personalized outreach
Better decisions

How:
Reports → Dashboard (choose metrics) Schedule auto emails
Contacts → Segments → Add filters

Integrations + Feedback

Why:
Unified workflow
Better client experience
Continuous improvement

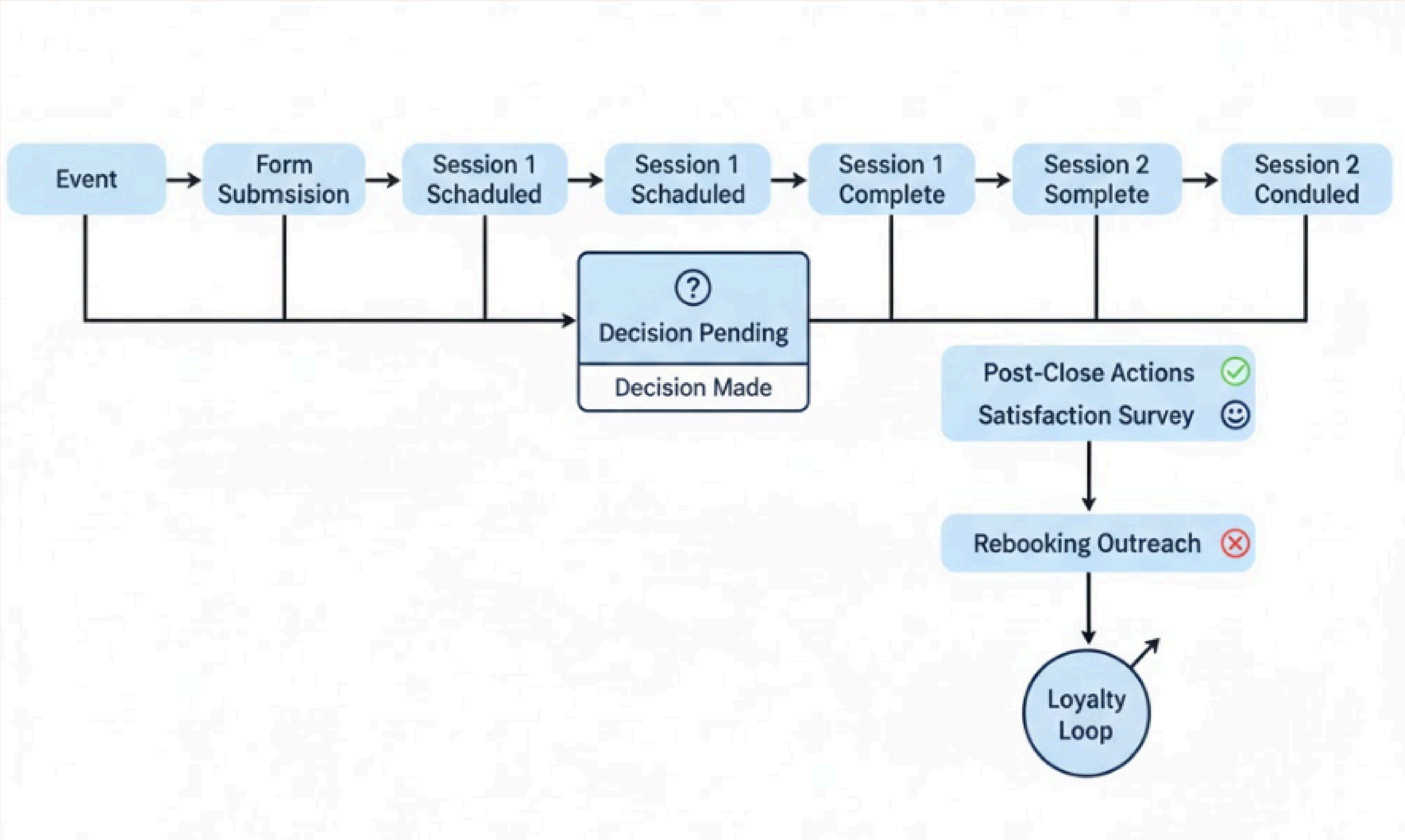
How:
Settings → Integrations (Mailchimp, Calendly, QuickBooks, etc.)
Feedback form → Trigger after deal closure



High-Level Pipeline

End-to-End Pipeline — Speaking & Hosting Program

Flowchart



HLP Speaking & Hosting Process — 9 Steps

Capture at Event
QR scanned
Tagging applied .

→

Auto Follow-Up
Thank-you + Session 1 link
Trigger: Event_FollowUp.

→

Book Session 1
Client picks slot
Moves to S1 Scheduled
Prep task created.

→

Run Session 1
Assistant takes notes
Sends S2 link
Stage S1 Complete.

→

Book Session 2
Client books
Prep task created.

→

Run Session 2
Assistant records
Accepted/Declined
Stage Decision Made.

→

If No Decision
After 7 days
Gentle nudge
Reactivation Campaign

→

Post-Close
Accepted
Day 30/60/90 nudges
onboarding tasks.

→

Partner Rebooking
High satisfaction
Rebooking email + call task
Trigger: Satisfaction Hig

Campaign Architecture in BoldTrail

Simple 3-phase timeline

Capture → Session 1+2 → Decision/Aftercare

Phase 1- Capture

Welcome → Book S1

Form Submitted → Tagged → Welcome Email → Book S1

1. Contact fills form or imported → BoldTrail tags them
2. Triggers Welcome + Nurture campaign
3. Goal: Book Session 1 (S1) quickly
4. Special series for Speaking/Hosting contacts

Phase 2- Session 1 + Session 2

- Welcome & Nurture → Service tag added at capture
- S1 Reminder → Stage = Session 1 scheduled
- S2 Reminder → Stage = Session 2 scheduled
- No Show Recovery → Appointment marked No Show
- Reactivation → Decision Pending 7 days no activity
- Post Close Protection → Decision Made = Accepted
- Event Follow Up → Tag Event_FollowUp added
- Rebooking Outreach → Partner Satisfaction = High
- Visual: Table mapping Trigger → Stage/Tag → Action

7. CALENDARS, BOOKING, AND FORMS

EACH SERVICE HAVE TWO BOOKING LINKS (S1/S2).

FORM SUBMISSIONS AUTOMATICALLY INCLUDE TAGS.

- Family Wealth contact form.
- Speaking and Hosting event participant form.
- General contact form.

ALL COMMUNICATION RECORDS ARE VISIBLE ON THE TIMELINE.

- **Connect email & phone**——In Settings, link your email and phone so calls, texts, and emails auto-log.
- **Open today's work**——Tap Calls/Tasks → start the Dialer to work the call list.
- **Make the call**——The app dials from the contact record. When you finish, tap the outcome.
- **Send quick message**——From the contact screen, tap Text or Email, choose a template (S1, S2, no-show, rebooking), and send.

8. DAILY AND WEEKLY OPERATIONS

BRIAN DAILY

- Clear tasks
- Check new lead tags for completeness
- Write notes per session
- Update the Stage tag (If someone schedules an in-person meeting)

TAYLA WEEKLY

- Adjust schedule
- Check dashboard
- Make minor optimizations

WEEKLY OPERATIONS

- Check tag hygiene
- Check pipeline alignment
- Rerun acceptance tests

SOP

HOME GOAL 2027

Phase	Content
Phase I: **PLAN** - Mortgage-Readiness & Financial Discipline (Months 1-3)	• **Month 1: Credit & Debt** • **Month 2: Tax Strategy** • **Month 3: Savings & Budgeting**
Phase II: **PURCHASE** - Co-Buy Strategy & Deal Execution (Months 4-8)	• **Month 4: City Programs Masterclass** • **Month 5: The Co-Buy Blueprint** • **Month 6: Property Analysis** • **Month 7-8: The Hunt & Bidding**
Phase III: **PROTECT** - Asset Protection & Generational Legacy (Months 9-12)	• **Month 9: Landlord 101** • **Month 10: The Legal Shield** • **Month 11: Refinance & Expansion** • **Month 12: Final Prep**

HOME GOAL 2027 (FAMILY WEALTH CONSULTANCY)

PHASE I: PLAN (Months 1–3)

Goal: Credit-readiness, tax-readiness, budgeting, and savings.

BoldTrail Tags

- Service_HomeGoal2027
- Stage_PLAN
- PLAN_Credit
- PLAN_Tax
- PLAN_Budget

Pipeline Stages

1. Captured
2. PLAN – Credit Ready
3. PLAN – Tax Ready
4. PLAN – Budget Setup

Smart Campaign Automations

- Monthly reminders to upload financial documents
- Tasks for credit repair, DTI calculation, budget setup
- Auto-trigger: "Schedule your Homeownership Consultation (S1)" after PLAN completion

HOME GOAL 2027

PHASE II: PURCHASE (Months 4–8)

Goal: Apply for city programs, begin home search, evaluate properties, submit offers, go under contract.

BoldTrail Tags

- Stage_PURCHASE
- PURCHASE_Programs
- PURCHASE_CoBuy
- PURCHASE_Offer

Pipeline Stages

5. PURCHASE – Ready to View
6. PURCHASE – City Program Submitted
7. PURCHASE – Offer Stage
8. PURCHASE – Under Contract

Smart Campaign Automations

- Viewing reminders
- Checklist tasks for applications and paperwork
- Auto-task for agent follow-up when entering Offer Stage

HOME GOAL 2027

First-Time Homebuyer Workshops

Get ready for homeownership with free, HUD-approved workshops offering personalized counseling on budgeting, credit, and the home-buying process.

oaklandca.gov

PHASE III: PROTECT (Months 9–12)

Goal: Property protection, title selection, landlord preparation, long-term wealth strategy.

BoldTrail Tags

- Stage_PROTECT
- PROTECT_Title
- PROTECT_Landlord
- PROTECT_Wealth

Pipeline Stages

9. PROTECT – Title Planning
10. PROTECT – Landlord Training
11. PROTECT – Final Prep

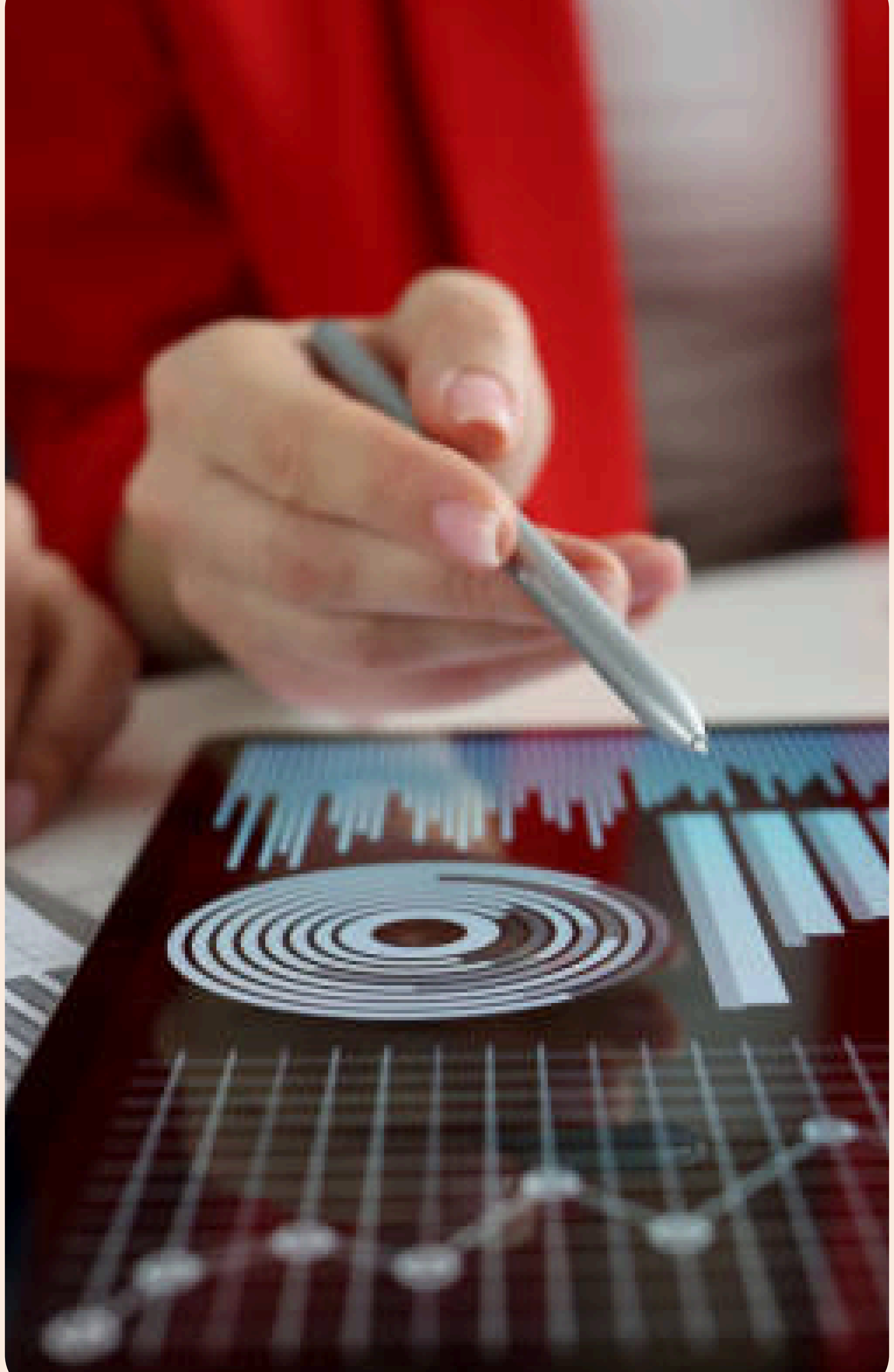
Smart Campaign Automations

- Title structure reminders (TIC/LLC/Trust)
- Landlord training modules
- Final month “Graduation + Next Steps” sequence

9. AUDIT

- **Audit Process Overview**

Weekly audit steps	Action	Where
1	Set Last 7 days and note KPIs	Dashboards
2	Set Last 30 days and note KPIs	Dashboards
3	Filter to the same dates and count records	Pipeline, Contacts
4	Compare counts with the dashboard and fix bad tags or stages	Pipeline, Contacts
5	Log issues and owners for next week	Governance log



9. AUDIT

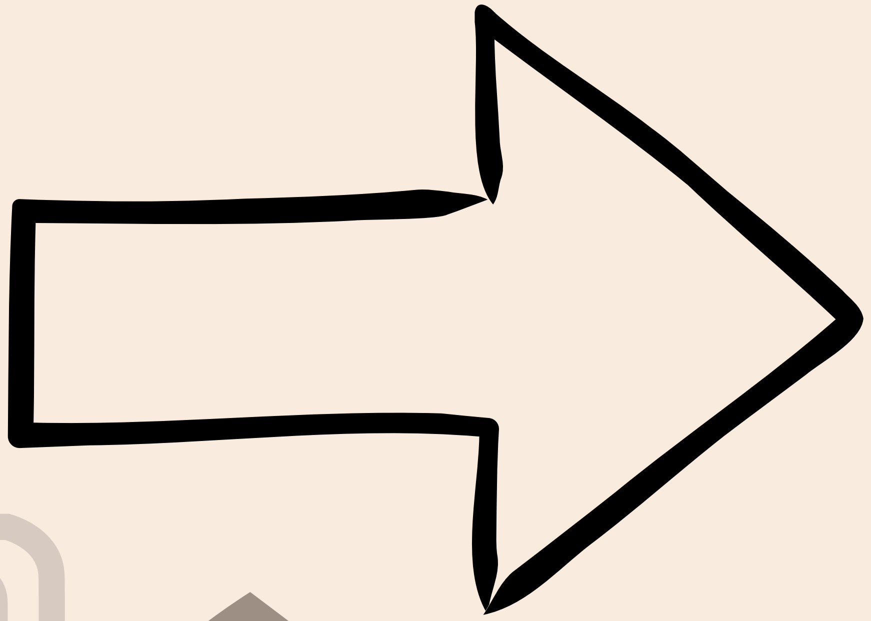
- **KPI Framework and Baseline Targets**

Indicators	What it means	Target now	Target next quarter
Time to first contact (min)	Minutes from capture to first touch	60 min	-
Show rate S1	Percent of booked S1 that attend	70%	-
Decision rate S2	Percent of S1 that reach a decision	60%	-
Event to consult conversion	Percent of event attendees who book a consult	10%	-
Complete contact data	Percent of contacts with all required fields	90%	-
Correct tags	Percent with correct Service Source Consent Stage	90%	-
Days capture to S1	Days from capture to S1 date	7 days	-
Days S1 to decision	Days from S1 to decision	14 days	-
Partner rebooking	Percent of partners that rebook after high satisfaction	50%	-

10. IMPLEMENTATION PLAN

One-time acceptance tests before go live

- Form → Contact
- Tag → Campaign
- Booking → Stage and tasks
- No Show recovery
- Decision → Aftercare
- Dashboard match for 7 and 30 days



Post-Go-Live Monitoring

- 2-week stability check
- Daily tracking
- Governance & fix within 24 hours

11. HOW TO MEASURE PERFORMANCE IN BOLDTRAIL

- **How BoldTrail Measures Performance**

- Use built-in dashboards, saved views, filters, appointment status
- No external tools required
- Every dashboard tile must use a Saved View with fixed: Service / Stage / Consent
- Monthly filter audit prevents tag or field drift

11. HOW TO MEASURE PERFORMANCE IN BOLDTRAIL

- **Saved Reports & Filters (Source of Truth)**

Why it matters

- Dashboards must come from Saved Views for consistent reporting
- Ensures every team member sees the same numbers

Required Filters

- Service = Family Wealth
- Stage = S1 Scheduled
- Consent = Yes

How to Create (Quick Steps)

- Contacts → Filters
- Add required filters
- Save View & name it clearly
- Use this Saved View as dashboard source

11. HOW TO MEASURE PERFORMANCE IN BOLDTRAIL

- **Key Dashboards (Family Wealth + Speaking & Hosting)**

<u>Family Wealth Dashboard</u>

Intake & Conversion

- Time to First Contact
- S1 Show Rate / S2 Decision Rate
- Days: Capture→S1 / S1→Decision

Data Accuracy

- % Required fields complete
- % Correct tags (Consent / Service / Stage)

Cohort Participation

- % Accepted → Enrolled
- Days Decision→Cohort
- Attendance by cohort
- Batch enrollment

<u>Speaking & Hosting Dashboard</u>

Event Reach

- Attendance Rate
- Attendance by type/location

Lead Conversion

- % Attendees → S1
- Days Event→S1
- Top converting event types

Engagement Quality

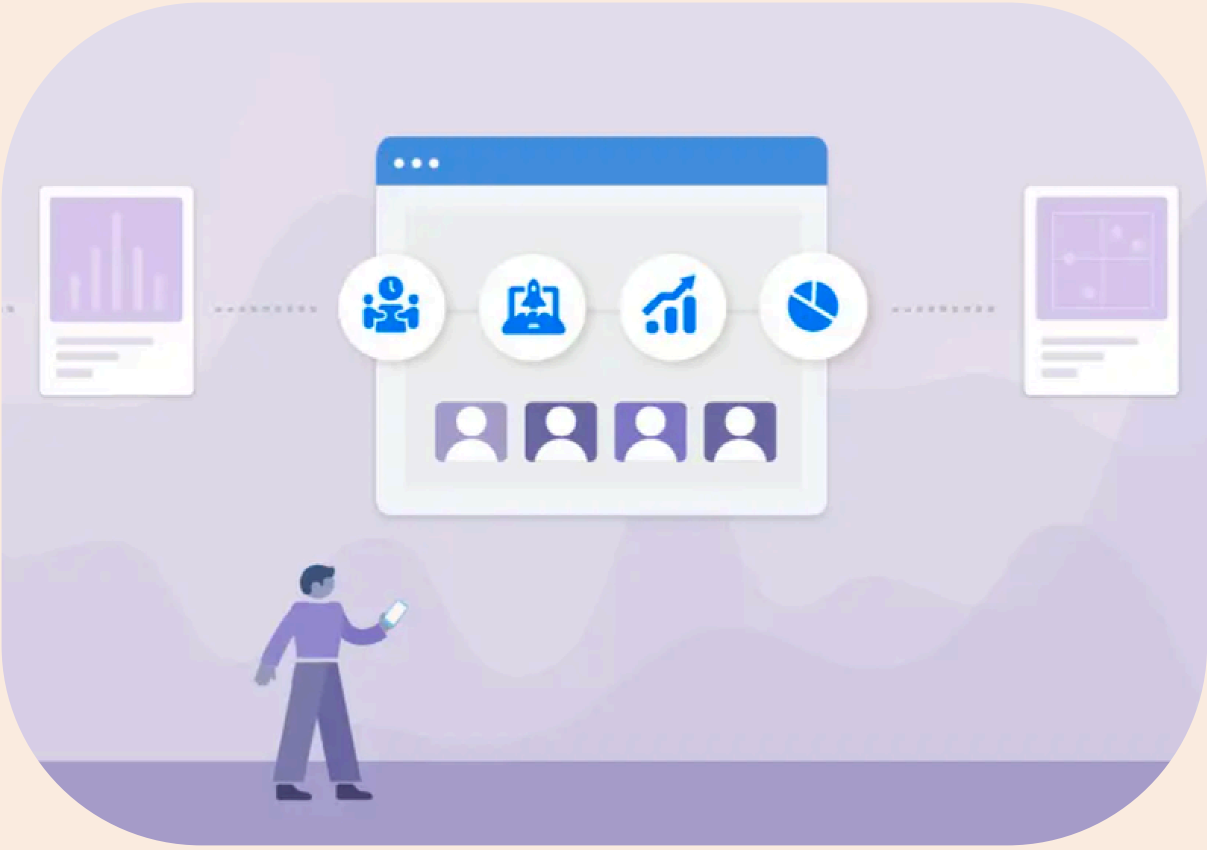
- % Completed contact data
- % Consent captured
- Smart Campaign triggered

11. HOW TO MEASURE PERFORMANCE IN BOLDTRAIL

- **Primary KPIs (Track Weekly)**

KPI

- Time to First Contact
- S1 Show Rate
- S2 Decision Rate
- Event → Consult Conversion
- Complete Contact Data
- Correct Tags
- Days Capture → S1
- Days S1 → Decision
- Partner Rebooking

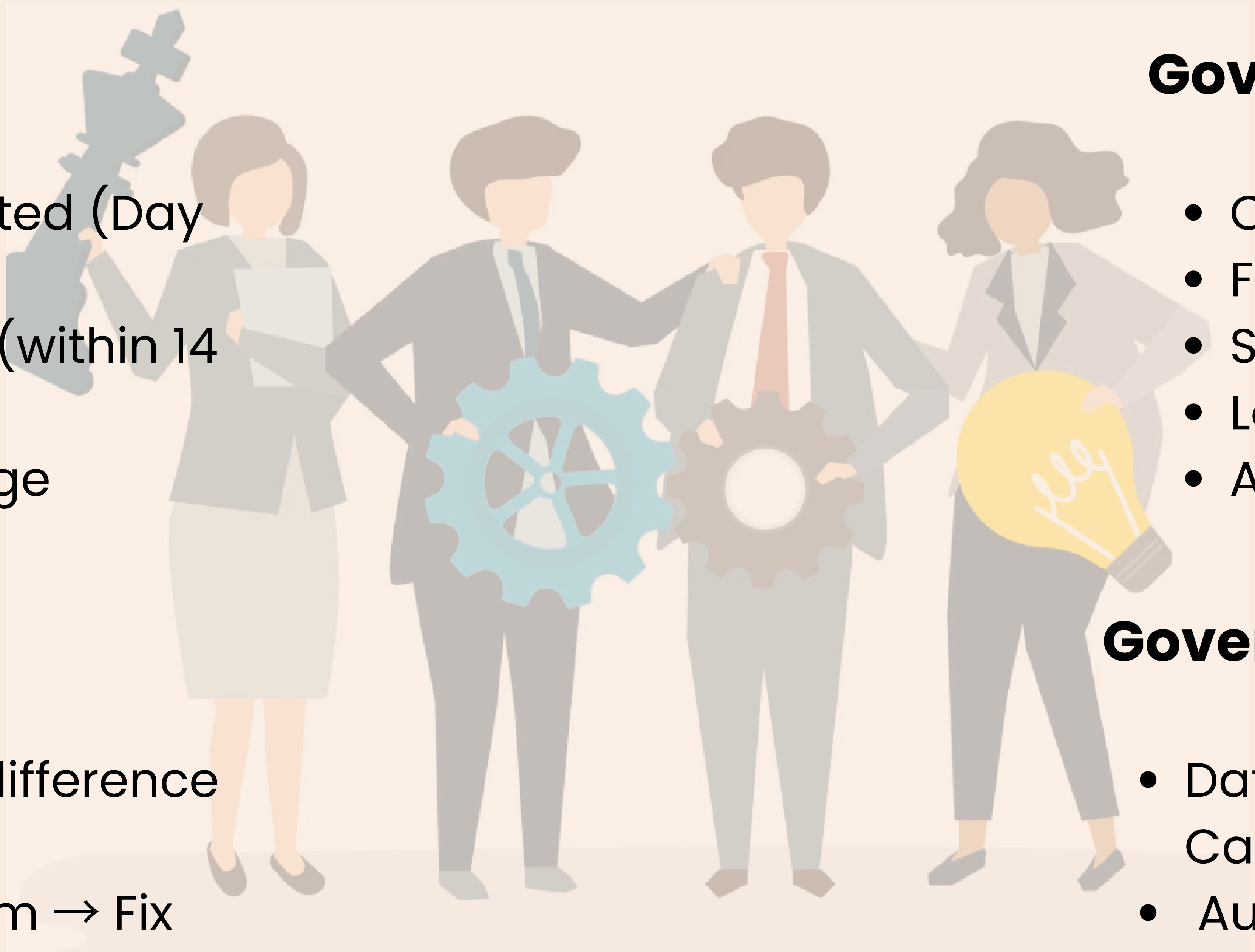


How to Track

- Time to First Contact
- S1 Show Rate
- S2 Decision Rate
- Event → Consult Conversion
- Complete Contact Data
- Correct Tags
- Days Capture → S1
- Days S1 → Decision
- Partner Rebooking

11. HOW TO MEASURE PERFORMANCE IN BOLDTRAIL

- **Secondary KPIs & Governance Control**



Secondary KPI

- Post-Close Tasks Completed (Day 30/60/90)
- Cohort Enrollment timing (within 14 days)
- Stage Tags ≠ Pipeline Stage mismatch

Governance Trigger

- Dashboard vs Smart List difference > 2%
- → Log in Governance Form → Fix within 24 hours

Governance Process

- Compare stage tags vs pipeline
- Fix broken or missing tags
- Spot missed automations
- Log issues in Governance Log
- Assign owner + deadline

Governance Log Form Fields

- Date / Issue Type / Contacts / Root Cause / Assigned To / Deadline
- Automation: Notify Ops Manager when submitted

12. RISKS AND MITIGATIONS

Low Attendance or High No-Show Rate

- Use BoldTrail automated reminders (24h and 2h), provide rescheduling links, and monitor attendance dashboards weekly.

Event Execution Issues

- Follow a pre-event checklist (Wi-Fi, AV, backup plan), assign an event lead, and record sessions when possible.

Duplicate or Misaligned Records

- Activate deduplication rules, perform weekly tag hygiene checks, and ensure one active stage tag per record.

Compliance and Privacy Breach

- Require Consent_Yes tags before automation; enforce role-based access and quarterly privacy reviews.

THANK YOU