

Point2 Agent for Brokers Getting Started Guide

Congratulations! You just took the first step to gaining access to more marketplaces, reaching more buyers and sellers, and selling more properties.

You just decided to create a Point2 Agent account for yourself and your Agents.

While everyone's learning paths, goals for their websites, and online marketing strategies are different, there are some initial steps that can be followed to get your Point2 Agent sites specifically branded, showing listings, and starting to generate leads.





Implementation Checklist

Brokerage Setup Items

- Create the Brokerage account (steps 1 and 2).
- Create the Brokerage website* (step 9).
- Create Template that will be provided to your agents* (step 10).
- Determine plan for Support Staff education (step 8).
- Begin knowledge campaign well in advance of the release date (step 11).
- Create agent roster and send out roster invitations (step 12).

Agent Setup Items

- Have agents sign up through self-registration link in roster invitation (step 13).
- Determine plan for educating your agents (step 17).

* Some Brokerages choose to hire [a Qualified Website Designer from the Point2 Alliance Member Program](#) for assistance.

Welcome to Point2 Agent!

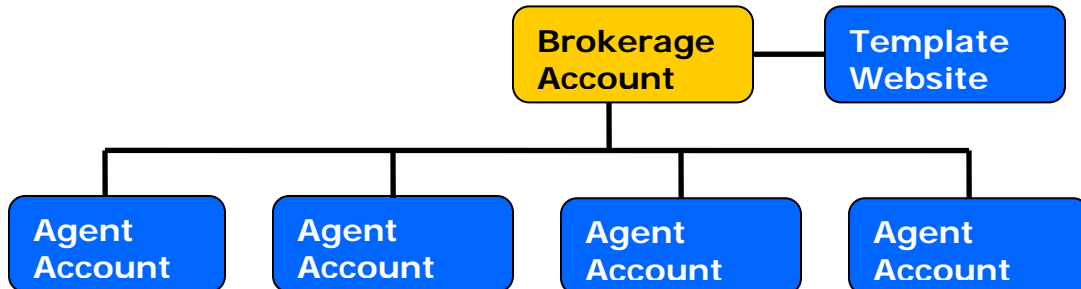
Point2 Agent is designed to give your Brokerage the tools to effectively market listings, track online performance, manage online prospects, and increase your market share.

This Broker Getting Started Guide will walk you through a series of steps to implement the software throughout your company. Support resources that can be used in conjunction with this Guide include:

- **Point2 Agent Education website:** www.Point2AgentEducation.com contains information regarding live online Education Sessions and educational resources like the User Manual and Training Videos (for more details, see step 21).
- **Point2 Agent website:** www.Point2Agent.com contains resources regarding the features, membership levels, resources, and blog for Point2 Agent.
- **Point2 Customer Service:** Point2 Customer Service Representatives are available via email and phone for all of your software-related questions.

Point2 Agent for Brokers Structure

- The structure of a Brokerage using Point2 looks like this:



Brokerage Account: at the top of the structure is your Point2 Agent Brokerage Account, which will be linked to every agent account in the structure. This relationship is created via the Point2 Roster feature and allows you access to listing and prospect reports. All Point2 accounts come with a website option, although it is not a requirement.

Agent Account: The Point2 Agent solution for Brokers works best when each of your agents has his or her own Point2 Agent account. Again, a Point2 website is an optional feature for your agents.

Template Website: you can choose to set up a template for the websites that you and your agents will be using to ensure consistent branding, information, and visitor experiences. Once the agents have their template website, they may edit the content and design to suit their individual needs and target markets.

- The number of agent accounts can expand to cover all of the agents within your Brokerage and offices.
- This Brokerage Getting Started Guide covers how to set up the Brokerage account, the Template Website, and inviting your agents to join your Roster. There is also a [Point2 Agent Getting Started Guide](#) that will assist your agents in the process of accepting the roster invitation, updating their information on their website, entering listings, and using their Point2 Agent account.

Step 1. *Selecting a Membership Level*

- When initially signing up for the Point2 Agent online marketing solution, you will have the option to choose between our Standard, Professional, and Premium membership levels, each offering a [number of features](#).

- When you specify the use of your Point2 account as "[Broker](#)", these additional features are added:
 - **Roster Management** – create a network of accounts that correspond to the agents within your Brokerage, with the agents' photo and information being displayed on your Brokerage website (part of the Premium membership).
 - **Template Website** – create a template for your agents' websites, so that each has a look and feel consistent to the Brokerage branding.
 - **Prospect Routing** – online visitors on the Brokerage website who submit their personal information become Prospects within the Point2 system. You may set up your account to either automatically assign the Prospect to the relevant agent, or manually assign the Prospect to an agent.
- It is recommended that Brokerages sign up for the Premium membership to have the full capabilities and flexibility of the Point2 Agent system, including: an unlimited number of agents on the Roster; unlimited website pages; the ability to not only assign prospects, but also revoke them; as well as many [other features](#) exclusive to Premium members.

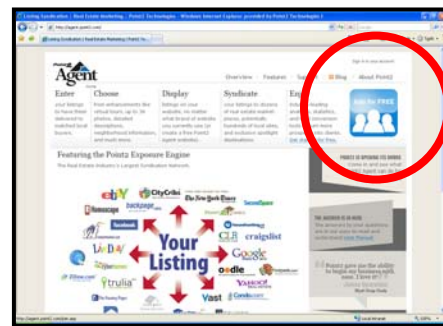


Step 2. Create Your Point2 Agent Account

There are multiple ways that you can activate a Point2 Agent account:

1. Visiting www.Point2Agent.com

- In the top right-hand corner of the homepage, there is a blue icon that states "Join for FREE".
- Clicking on this icon will begin the registration and account creation process. There are several screens requiring you to enter in your information and make choices for your website. Carefully read each page and enter in complete information, as this will be used as part of your account and in key areas of your website.





2. Creating a Point2 Agent website via your Syndication Dashboard from your MLS/Association

- If your MLS/Association currently syndicates listings through the Point2 Agent system, you have received an invitation and link to [create a Syndication Dashboard](#) to determine the Syndication Partners for your listings, as well as review reports regarding listing views and prospects.
- If you currently have a Syndication Dashboard and would like to create a Point2 Agent account so that your listings are fed into your Online Office and displayed on your website, [visit the Getting Started Guide](#).
- In some cases, your MLS/Association or Brokerage may have already created a template for all Agent websites. If this is the case, your site will have the underlying template already created for you, although you can still edit the content and pictures on your site (see step 9).
- As a Brokerage, you will also be able to create your own template website design for your agents to use in the future (see step 10).

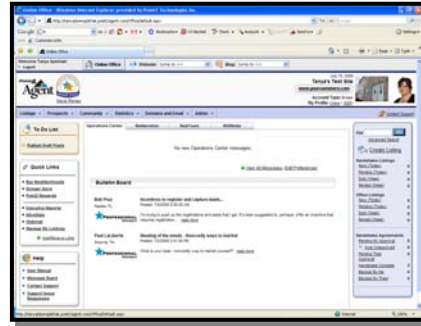
3. Accepting a Roster Invitation from your Broker

- If you are a Brokerage currently operating under another Brokerage, they can send you an invitation in the form of an email with the subject line of "Point2 Personal Invitation from (Brokerage Name)".
- Acceptance of this invitation will place you in the Brokerage's roster and create a Handshake reciprocal agreement between you and the Brokerage, which means that you can display each other's listings on your Point2 websites, and the Brokerage can start routing leads to you. For details on Handshake, see step 14 or the [Point2 Agent website](#).
- Not accepting, or doing nothing with the email, means that the listings will not show on your site, and leads are not routed to you, so it is imperative for you to accept the invitation as soon as possible.
- In some cases, the Brokerage may have already created a website template. If this is the case, your site will have a particular look, although you can still edit the content and pictures on your site (see step 9).
- Once you have your Brokerage account set up through Point2 Agent, you also have the option to send out Roster Invitations to your agents (see step 12).

NOTE: At any time, should you need assistance, go to step 21 to review the Education and Support Resources available to you and your staff.

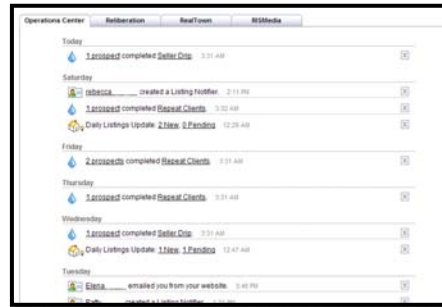
Step 3. Enter Your Online Office

- Upon completing the registration and account activation process, you will be offered the opportunity to view your website or be taken into the Online Office, which is the main administration console where you will manage listings, prospects, account information, receive updates in the form of statistics and messages, and manage the agents in your Brokerage.



- Anytime you want to return to this main Online Office screen, press the large Online Office button at the top of the screen.

- Updates that are specific to you, such as alerts regarding new Prospects, are all contained within the Operations Centre down the center of the main Online Office screen.

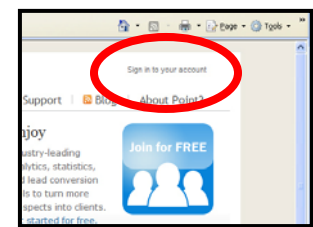
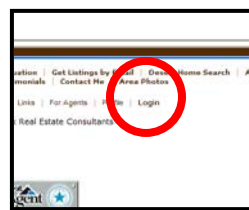


- Becoming acquainted with the various areas of the Online Office will increase your efficiency and productivity when wanting to update your website, follow-up on new leads, or work with listings. *View:* [User Manual](#); [Training Video](#)

Step 4. Access Anywhere

- Since Point2 Agent is an online marketing solution, your Online Office is available at anytime with an Internet connection, giving you the flexibility to access statistics, new prospects, and your editable website within minutes.

- To log into the Online Office, click the "Login" link at the bottom of your website or click on the "Sign in to your account" on the Point2 Agent website.



- Login using the username and password you entered when initially setting up your account. For assistance, *view:* [User Manual](#); [Training Video](#). If experiencing difficulties, there are some troubleshooting tips in the [User Manual](#).

Step 5. *Be Found*

- An integral part of your Point2 Agent website will be having your contact details available, so that online visitors can contact you regarding their real estate needs.
- There are a number of details and images that should be input, so that they can be used in all of your online marketing pieces: personal photo, company logo, personal details, and company details. *View:* [User Manual](#); [Training Video](#)
- You will need to confirm your membership in order to use all of the features that come with your Point2 Agent online marketing solution. *View:* [User Manual](#)

Step 6. *Brand Yourself*

- The personal information you entered in step 4 not only makes you accessible to online visitors wishing to contact you, but these contact details are also used for branding on Point2 Agent online marketing tools, such as Branded Email.
- You can enhance your marketing and branding efforts by creating a professional email addresses, such as "you@yourname.com".
- To create your personal email address, you need to do two things:
 - Create and register a domain *View:* [User Manual](#); [Training Video](#)
 - Create an email account *View:* [User Manual](#); [Training Video 1](#); [Training Video 2](#)
 - *Note:* Keep in mind that you can create multiple email accounts, although the type of account will depend on your [membership level](#).
- Brandable email accounts that integrate with Drip Email and Predictive Marketing are available to Point2 Agent Professional and Premium members.

Step 7. *Determine Your Selling Areas*

- Research indicates that buyers begin searching for homes based on neighborhoods, which is imperative information to include on your website, both for online visitors and for search engines. *View:* [User Manual](#); [Training Video](#)
- Selling areas also determine available local agents for your reciprocal advertising agreements through the Point2 Agent Handshake program (see step 14). As a Brokerage, you will need to enter in all of the Neighborhoods that your Brokerage covers, so that Handshake relationships can be made with all of the agents within your brokerage.

Step 8. Determine Education for Support Staff

- Point2 provides a number of Education Sessions related to specific features of the Point2 Agent software, industry needs, and more. Upcoming sessions and registration information is listed on the [website](#).
- Further education options are also available to you, your staff, and your agents (see step 21).

Step 9. Build Your Website

- Your Point2 Agent website will be a key aspect of your online marketing strategy, as that is what prospective buyers and sellers will see when they find you online.
- Your website also integrates with all other Point2 Agent online marketing tools, so it is imperative to address these key aspects of your website, to ensure consistent branding and marketing:

- **Page Content** - new Point2 Agent websites contain pages that contain default content. It is recommended you customize this textual information and add content modules, to enhance your branding and provide information on your services and listings. This will not only help to engage and keep online visitors on your website, but also help your search engine rankings. View: [User Manual](#); [Training Video](#)
- **Displaying Listings** - online visitors go to real estate websites to view listings, so having listings showing on your homepage is recommended. There are several ways to do this:

- **Listings module** - displays determined listings in a grid or list format. View: [User Manual](#); [Training Video](#)



- **Featured Listings** - highlights one key listing. Your website can contain multiple Featured Listings modules. View: [User Manual](#); [Training Video](#)

- **Listings by Map** - provides a Google Earth map with markers that indicate your listings. View: [User Manual](#); [Training Video](#)



- **Website Editing Tools** - changing the colors, font, and layout of your site will increase your brand awareness, marketing consistency, and

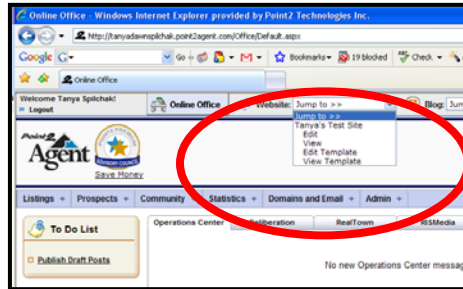
personality. *View:* [User Manual](#); [Training Video](#)

- **Search Engine Optimization** - once your website is updated, optimizing the SEO information will increase your chances of being found by search engine crawlers. *View:* [User Manual](#); [Training Video](#); [Education website](#)
- For further ways you can modify your website, view the [User Manual](#) or [Training Videos](#)

Step 10. *Build Your Template*

- Your Point2 Agent website has two main components: your public-facing website and your template website, which can be shared with agents you invite to join your Roster.

- Since your Point2 Agent account has been setup as a Broker, you can access your template through the Online Office.



- The template is created and modified in the same way that the public-facing website is created and modified. The key thing with the template is that this design will become the foundation for all of your agents' sites, should they accept that initial roster invitation from you. *View:* [User Manual](#)
- It is important to note that the design of the template at the time the roster invitation is sent is the template that the agent will receive. So, if the roster invitation is sent today, but you make changes to the template tomorrow, the agent will still have the design from today. Future changes in the template are not pushed out to the agents' sites. The reason for this: those agents have the functionality to change their sites and create content that is specific to them, their business, their skills, and their target markets. Pushing template updates would affect the changes they implemented on their websites.
- If there are large changes that need to be implemented with all agent sites, you will need to share this information and get the agents to implement the new design manually.

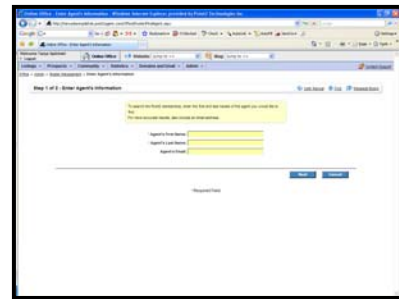
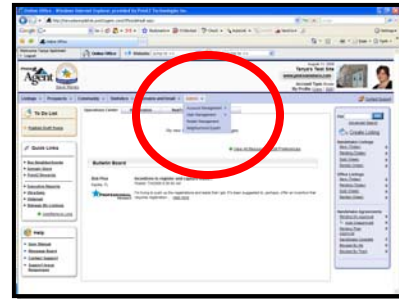
Sometimes Brokerages will have someone designated to make Broker-related changes on the agent sites, with that person being set up as a user in the Online Offices of each agent (*View:* [User Manual](#); [Training Video](#)). The agents can then determine the Security Level Setting for that user, so that the user is limited to only adjusting the design of the site (*View:* [User Manual](#); [Training Video](#)).

Step 11. *Launching a Knowledge Campaign*

- It is imperative that your agents and offices are properly informed of your Point2 Agent solution implementation prior to the release date. This will help ensure a smooth transition and optimal adoption.
- We recommend sending company-wide notices, following this timeline:
 - One month prior to launch: Teaser Announcement
 - Two weeks prior to launch: Pre-Launch Announcement 1
 - One week prior to launch: Pre-Launch Announcement 2
 - Day of launch: Launch Announcement
- [Examples of the emails to send are accessible online.](#)

Step 12. *Create Your Roster*

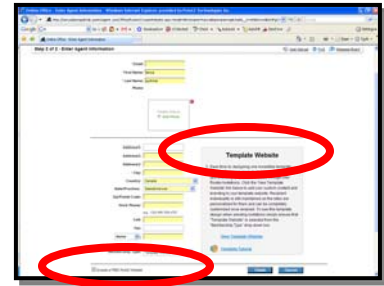
- Rosters will not only help display the photos and information for the agents within your Brokerage, but also create the reciprocal Handshake agreements with those agents, making it easier for you to route prospects and dual-market listings.
- To create a Roster, log into your Online Office and select “Roster Management” from the Admin menu in the main navigational bar.
- Upon first entering the Roster Management, it will indicate that “There currently are no Accepted Agents added to your Roster”. To start inviting agents, select the “Invite Agent” link to the left.
- Enter in the first and last name of the agent you wish to add to your Roster, and the system will look for him or her to see if there is currently a Point2 Agent site for that agent. You can also include an email address in the search.
- If there is an agent who matches your search criteria, one or more search results will be given; otherwise, it will indicate that there are no members who match your criteria. In either case, if you do not see the agent you wish to add to your roster, you can refine the search or create a new Point2 Agent account for a new member.
- Choosing to create a new Point2 Agent account will take you into a screen to enter in the new member’s information, with the name, city, and email being mandatory, as the agent will be sent a roster invitation email, inviting them to



accept the invite and be placed on your Roster.

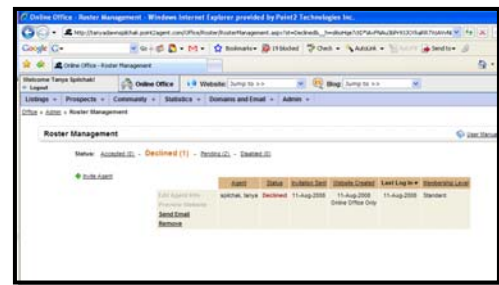
- Please note two things on the screen:

1. **Template Website:** if you are planning on creating a template for your Brokerage and all of your agents, it is imperative that you create the template prior to inviting agents to join your Roster. Any changes you make to the template **after** agents accept the invite will not show up on the agent websites. To create your template, see step 10.



2. **Include a FREE Point2 Website:** In the bottom left-hand corner, it is indicated that a Point2 Agent website will be created for this agent. If this agent does not need a Point2 Agent website, but should still be on your Roster, uncheck this box. It will still create a Point2 Agent account in the system, complete with a profile, syndication, and statistical information, but the public website will not be created.

- Clicking “Finish” will send the agent a roster invitation email, and place the agent in your Roster Management screen, which divides roster invitations to agents into four categories:



1. **Accepted** – agents who have accepted your roster invitation and who will now appear on your Roster. A Handshake agreement between them and the Brokerage is also created, which means that listings will appear on both websites and that you can now route prospects and leads to the agent’s personal account (see step 19 for more details).
2. **Declined** – agents who declined the roster invitation and who will not appear on your Roster. Listings and leads cannot be assigned to these agents. If the agent declined in error, you can send them an email through the system, or invite them again.
3. **Pending** – the roster invitations that you have sent to agents who have neither accepted, nor declined, will appear under pending.
4. **Disabled** – if a website has been disabled, the agent information will appear in this category.

- Within any of these status grids, you can edit the agent information, preview their websites, send them emails, see important date information, as well as membership level. View: [User Manual](#)



- Through the Premium membership, your Roster places your agents' information on your website, providing them with further exposure and advertising.

Step 13. *Bring Your Agents Online*

- Upon adding your agents to your Roster, they will receive an [email from the Point2 Agent system](#).
- When the agent follows the link, they will be prompted to enter in the username and temporary password included in the email. Once they have done so, for security purposes the system asks them to change their password.
- The agent can now begin to use their Point2 Agent website, enter and syndicate listings, and start accepting online leads!
- A helpful resource for agents when starting with Point2 Agent is the [Point2 Agent Getting Started Guide](#), which goes through a series of steps that will assist in setting up their account, much like this Broker Getting Started Guide is currently assisting you.

Step 14. *Create Reciprocal Agreements*

- Point2 Agent's Handshake provides you with virtually limitless free local advertising through creation of entirely reciprocal agreements with other local Agents. All Handshake relationships are under your complete control: you choose who you want to work with!
- To view Handshake requests and determine whether to approve or block, visit your Community area in the Online Office. *View:* [User Manual](#); [Training Video 1](#); [Training Video 2](#)
- When agents accept your roster invitation and operate within your set Brokerage Selling Areas, an automatic Handshake relationship is created between your Brokerage account and the agent. You can then begin marketing the same listings and getting that further exposure.

Step 15. *Enter Your Listings*

- Online visitors going to real estate websites are usually looking for one thing: listings. With Point2 Agent, there are three ways to have listings posted on your Point2 Agent website:

- **Manual posting** - you enter in the listing description, photos, virtual tour, etc. *View:* [User Manual](#); [Training Video Part 1](#); [Training Video Part 2](#)
- **Brokerage posting** - Brokerages can enter the listings for the Agents in their offices and then assign or Handshake the listings to the Agents
- **MLS posting** - once your MLS/Association has implemented the Point2 Agent Enterprise solution, listings entered into the MLS system will be fed into your website.
- At any time you can edit your listings to add additional information and photos. *View:* [User Manual](#); [Training Video](#)
- Point2 Agent Listings can:
 - contain up to 36 photos
 - have editable Point2 Agent Virtual Tours (*View:* [User Manual](#); [Training Video](#)) or third-party virtual tours attached
 - be syndicated to over 30 Point2 Agent Syndication Partners

Step 16. Advertise/Syndicate Your Listings

- With over 30 Syndication Partners, Point2 Agent provides the most comprehensive online advertising of your listings in other marketplaces, putting you and your listings in front of more buyers and sellers.
- So that you can target relevant marketplaces, the Syndication Partners available to you will depend on the selling area that you service. While most of the Syndication Partners provide automatic syndication, there are a few who require manual postings. *View:* [User Manual](#); [Training Video](#)
- For an indicator as to what syndication is doing for your listings, there are reports available that report on each Syndication Partner (see step 20).



Step 17. Educate Your Agents

- Point2 provides a number of Education Sessions related to specific features of the Point2 Agent software, industry needs, and more. Upcoming sessions and registration information is listed on the [website](#).
- Further education options are also available to you, your staff, and your agents (see step 21).

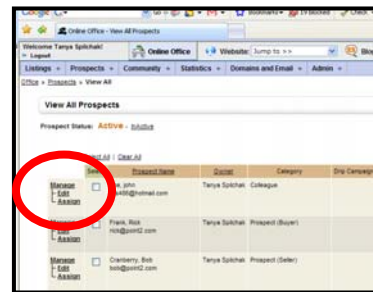
Step 18. Prepare for Your Leads

- Now that you have a website, prospective buyers and sellers can start visiting your site and interacting with you online! Point2 Agent offers two ways to enter this information into your Online Office:
 - **Automatically:** online visitors interested in contacting you or being included on system-generated updates can enter in their personal information into website forms. This data is then automatically entered into your Online Office. View: [User Manual](#); [Training Video](#)
 - **Manually:** you can create new Prospects and manually enter in the buyer or seller's information. View: [User Manual](#); [Training Video](#)
- Point2 Agent's prospect management system provides the tools to keep track of relevant listings, emails exchanged, notes, and other points of interest for the Prospect, giving you the knowledge you need to turn the Prospect into a client. View: [User Manual](#); [Training Video](#)

Step 19. Assign Leads

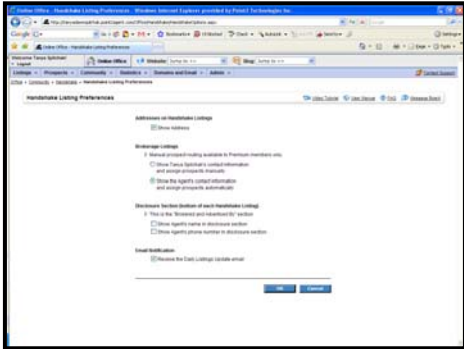
- Leads that come from the agents' websites will go the relevant agent, as that is where the lead was generated.
- Leads that come from the Brokerage website can either be handled by the Brokerage, or assigned to a specific agent in two ways:
 - **Manually** – leads that come from your website will be entered into the grid found on the "View All" page, which is found within the Propsects menu on the main navigation page. View: [User Manual](#), [Training Video](#)

- In the Premium membership grid, to the left of each Prospect, there is the option to Manage, Edit, or Assign the Prospect. Choosing "Assign" will provide the opportunity to choose the relevant agent for this lead.



- **Automatically** – you also have the option to have your Online Office automatically route Prospects to agents.
 - To determine the settings for this automated feature, in the Community menu in the main navigational bar, access the

“Handshake Listing Preferences” page, which contains:



- **Addresses on Handshake Listings** – choose whether or not the addresses will be displayed on listings shared through Handshake reciprocal agreements.
 - **Brokerage Listings** – indicate whether it is the Brokerage’s contact information that will show on the listings because the Brokerage will *manually* assign Prospects; or if it will be the agent’s contact information on the listing because the Prospects are going to be routed *automatically* (the system will automatically send the Prospects related to that listing to the agent).
 - **Disclosure** – for listings on the Brokerage website, it will indicate who the listing Broker is, but you can choose to have the agent’s name and number on the listing as well.
 - **Email Notification** – you can choose to receive a daily email that indicates new listings.
- Brokerages who are at the Premium level of membership can also choose to revoke Prospects from agents at any time.
 - For detailed instructions, view the [User Manual](#).

Step 20. Analyze Your Progress

- Knowing how your website, listings, syndication, and online marketing efforts are doing is essential for seeing success, as is understanding where listing traffic is being generated. Point2 Agent provides a variety of statistical reports that give you relevant information on how these aspects are performing, as well as where improvements can be made. View: [User Manual](#); [Training Video](#)

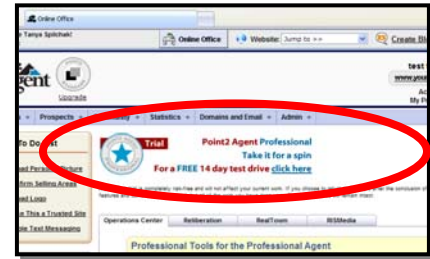
Step 21. Access Education and Support Resources

- There are two websites that you will want to make note of and bookmark:
 - www.Point2Agent.com
 - Access membership specials, feature information, support resources, the Point2 Agent monthly newsletter, and more.
 - www.Point2AgentEducation.com
 - Access live online Education Sessions, articles, and a variety of Educational Resources, including a [User Manual](#) (textual instructions), [Training Videos](#) (audio-visual instructions),

[Troubleshooting Guide](#), [Message Board](#) (communicate with others in the Point2 community), and [many more](#).

Step 22. *Take Your Business to the Next Level*

- Having a website is one component of an overall online marketing strategy. Complimentary components within a complete strategy include:
 - **Blogs** – have an integrated ‘online journal’ where you can provide information on real estate and anything else that interests you. Blogs can increase search engine rankings and develop online reputations, giving you more exposure. *View:* [Examples](#); [User Manual](#); [Training Video](#)
 - **Predictive Marketing** – have your website work for you by not only identifying listings that fit with a prospect’s interests, but then sending updates and relevant information to the prospect’s email. *View:* [User Manual](#); [Training Video](#)
 - **Drip Emails** - send relevant and timely emails to leads, as well as stay informed as to what they are receiving through extensive tracking and notifications. *View:* [User Manual](#); [Training Video](#)
- These components are all part of the [Point2 Agent Professional and Premium memberships](#). You can upgrade from within your Online Office. *View:* [User Manual](#); [Training Video](#)
- As an added bonus, Standard members have the opportunity to try the Professional membership for 14 days. To sign up for the trial, visit the main page of your Online Office.



Congratulations!

You are now on your way to building not only your Brokerage website, but also your brand, your leads, your number of listings, your prospect base, and your business!

Keep in mind that this is just the beginning. A solid online marketing plan takes time, effort, and continual website edits to evolve, change, and see further success. The Support resources at www.Point2AgentEducation.com will aid you in your endeavors, there is the Customer Service Team available to you, and your Point2 representative can answer any questions that may arise.

From everyone at Point2 - thanks for choosing Point2 Agent, and good luck!