Basic Steps to Setting up a Lead Sherpa Account

SHERPA

1
Create an account

2
Create a market

3
Skip Trace list (if necessary)
- How to Use Lead Sherpa's Integrated Skip Tracing Tool

4
Create a campaign
- How to Start a New Campaign

5
Upload list into a campaign
- If you have skip traced a file in Lead Sherpa, you can push the list directly to a Campaign via Skip Trace -> Push to SMS Campaign.
- If you have skip traced a file from another source, you can add the list via the "Add Prospects" button in the top-right corner of the campaign.

6
Create SMS Templates
- The quality of templates is the bloodline of success in Lead Sherpa. Taking the time to set up high-quality templates will get you the results you are looking for in the long run.
  - Watch our 45-minute webinar on how to get in the mindset of creating templates
  - How to Create New Outgoing Templates
  - SMS Template Categories and Auto-Rotate Capabilities

7
Send messages
- Open the campaign to send from
- Select the template category to use
- Click send (in the lower left corner)

8
Reply directly to prospects when they respond
- Replying to Messages

9
Follow up with prospects (in bulk)
- Creating Follow-Up Campaigns

Additional Account Features

Account Settings
- Account Info & Settings
  - Verify the time zone reflects the company time zone
  - Change if necessary
- Billing Information
  - Update payment method if necessary
- User
  - Add any users to the account
  - Adding a new user and different types of roles
- Company
  - Select the campaign settings for the account to enable
- Lead Stages
  - Set up any custom lead stages as desired. There are default stages that can not be removed, but an unlimited amount of custom lead stages can be added
  - Custom Lead Stages
- Manage App Integrations
  - We currently have an API with Podio and Zapier.
  - Integrate Lead Sherpa with Podio
  - Zapier Setup: Connect to CRM Workspace
- Prospect Relay Settings
  - How to Use Prospect Relay
- Tag Management
  - Creating Custom Tags and Distress Indicators

Campaigns
- Tags
  - Prospect Tags
  - How to Apply/Remove Tags from a Property
- Quick Replies
  - How to Search, Add, and Edit Quick Replies

Campaign Metrics
  - Understanding Campaign Metrics

- Sequences
  - Using Sequences to Schedule Prospect Follow-Ups
- Prospect Action Buttons
  - Verified, DNC, Priority, Qualified, and Wrong Number

Dashboard
- Dashboard Metrics
  - Reading the Dashboard

PropStack
- List Stacking feature
  - Stacking Your Data Within PropStack

Prospect Relay/Click to Call
- Ways to call a prospect
  - How To Use Prospect Relay
  - Click to Call

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