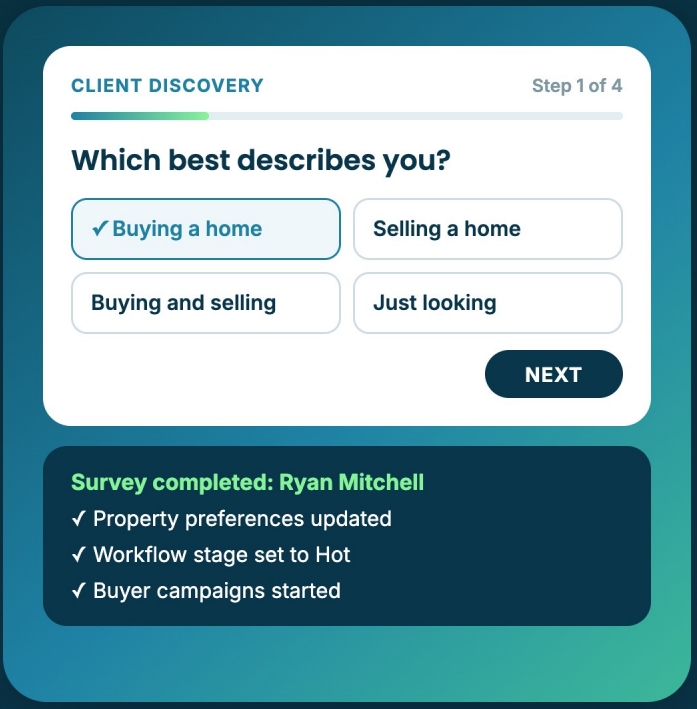
RISE

By MoxiWorks

Client Discovery Survey

Ask Once. RISE Takes It From There.



What It Does

Send contacts a short survey. Their answers update their record, set their workflow stage, and start the right campaigns.

Why It Matters

- Learn what every contact wants
- Skip the manual data entry
- Start the right campaign automatically
- Know when a seller is ready

Before You Start

Send it to contacts already in your RISE database. The survey goes out by email only.

Quick Setup

1. Go to Campaigns > Create Campaign > Select the pre-built Client Discovery campaign
2. Choose your audience
3. Review the email
4. Click Start

That's it. As answers come in, RISE updates each contact and starts the right follow-up.

Good to know: You can also add the Client Discovery survey link to any email you build in RISE.

Common Question

"What happens if a contact asks for a home valuation?"

RISE emails you right away with their details and timeline so you can follow up fast.

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