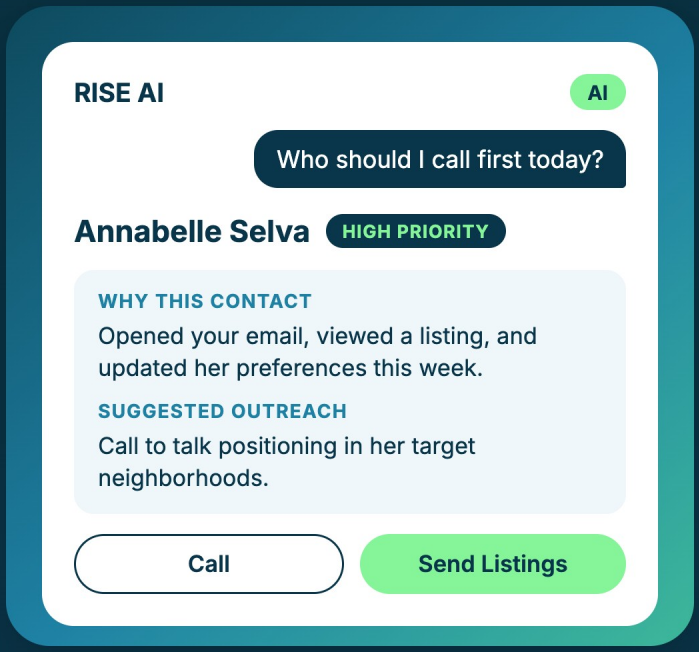
RISE

By MoxiWorks

Every detail you add helps RISE show you who to call and why. This guide walks you through the first steps that make it work for you.



AGENT GETTING STARTED GUIDE

Getting Started with RISE

Today's Information. Tomorrow's Opportunities.

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01 · WHY RISE

Your Day Is Already Too Much

You're tracking dozens of clients, keeping deals together, and answering every call, text, and email. Nobody has time to dig through a database to find who to call next. RISE is built for that.

Know Who to Call First

AI insights on your Dashboard show who's giving buying signals, what the signals are, and what to do next.

Know Them Before You Call

Ask RISE about any contact to pull their notes, tags, and email opens and clicks in seconds.

Never Miss the Right Listing

Save a buyer's criteria and RISE emails them matching new listings automatically.

Stay Present Automatically

Market Insights, Holiday, and Housiversary campaigns keep you in touch while you work.

Win the Listing

Build CMAs with RISE Picks, custom comps, and custom pages, or a Quick CMA from your phone.

Get Your Listings Seen

Boost a listing to social ads straight from a campaign with Promote.

Put something in. Get something useful back, right away.

RISE gets smarter as your data grows. You don't need all of it to start.

How to Find RISE

From Your Company Hub

Click RISE in the top menu. It sits alongside your other MoxiWorks tools, even if your hub has a different name.

From Moxi Engage or Present

Click RISE in the top menu to switch over.

On the Go

Use the RISE app. Add or Ask works the same on desktop and mobile, by typing or voice-to-text.

02 · YOUR FOUNDATION · STEPS 1–3

Set Up Your Foundation

Start here. Everything else in RISE builds on these three steps.

1 Add Your Contacts With a Valid Email

Every contact needs a valid email address. Then add what you know: a tag, a note, how you met.

✦ **Ask RISE:** "Which of my contacts don't have an email address?"

2 Classify Every Contact

Give each contact a type (Buyer, Seller, Investor, and more) and a workflow stage (Lead, Nurture, Warm, Hot, Under Contract, Post Close). Use tags for the rest: lead source, VIP, referral.

Good to know: Contacts never move stages on their own. Moving them is what fires stage-driven campaigns, so you stay in control.

✦ **Ask RISE:** "Which buyers are in my hot stage?"

3 Fill In the Details That Power Automation

Add an Insights Location ZIP or postal code for Market Insights, property preferences for Property Match, and key dates like birthday and house anniversary.

Tip: The Database Health widget on your Dashboard shows how many contacts are missing a type, tags, or preferences. Click any row to start filling them in.

✦ **Ask RISE:** "What's missing from [contact name]'s profile?"

03 · YOUR AUTOMATIONS · STEPS 4–6

Turn On Your Automations

Set it up once. RISE keeps you in front of your contacts while you work.

4 Launch Your Always-On Campaigns

Go to Campaigns > Create Campaign and search for each pre-built campaign. Choose your audience, set the schedule or trigger, and click Start.

Market Insights
Monthly market updates for each contact's area.
Needs: an Insights Location on each contact.

Just Listed
Emails your contacts whenever you get a new listing.
Needs: your MLS connected to RISE.

Holiday Campaigns
A greeting on each holiday in the group you choose.
Remember: re-enroll each year.

5 Send a Client Discovery Survey

From Campaigns, send buyers a Client Discovery Survey: price range, location, property type, and timeline. Their answers update their contact record, and with your MLS connected, RISE emails them matching listings automatically.

The buyer from three months ago hears about the right home the day it lists.

6 Make It a Daily Habit

- Each morning, check Top Contacts on your Dashboard.
- Each evening, move contacts to their new workflow stage.
- Any time, ask RISE who to call next.

Coaching tip: A board with everyone parked in Lead means stages aren't being worked. Start with one habit, then add one stage-based campaign on top.

04 · LEVEL UP

Once You're Rolling

When your foundation is in place, these tools turn your data into listings, deals, and leads.

Deals

Track Buyer and Seller deals on the contact record, linked to a real property, and see your pipeline on one board.

Start here: open a contact and create a deal.

Presentations

Build Seller and Buyer CMAs, Buyer Tours, Property Reviews, and Non-Listing presentations, with RISE suggesting comps.

Start here: turn on RISE Picks when you select comps.

Promote

Launch social and Google ad programs, or boost a listing straight from a campaign.

Start here: find the megaphone icon in the left-hand menu.

Tags & SmartGroups

Tags are groups only you know. SmartGroups fill themselves from rules you set, like an address.

Start here: Contacts > SmartGroups > Create Group.

Prompts to Try

Type or speak these on desktop or mobile.

- "Tell me everything about [contact name]."
- "Show me my sellers."
- "Create a campaign for contacts tagged 'new seller.'"
- "Build a campaign for my contacts in [ZIP] using the [email name] email."
- "For every contact with a city on file, tag them {city}-newsletter."
- "Which of my contacts don't have an email address?"

05 · YOUR CHECKLIST

Your First Two Weeks

Check these off as you go.

Week 1

- [ ] Find RISE and download the app
- [ ] Add contacts with a valid email
- [ ] Set a type and workflow stage on each
- [ ] Add Insights Locations and preferences
- [ ] Clear your Database Health gaps

Week 2

- [ ] Start Market Insights
- [ ] Start Just Listed
- [ ] Turn on Holiday Campaigns
- [ ] Send a Client Discovery Survey

Every Day

- [ ] Check Top Contacts
- [ ] Move contacts to new stages
- [ ] Ask RISE who to call next

Common Questions

"Why didn't everyone get Market Insights?"
Those contacts are most likely missing an Insights Location.

"Why didn't Just Listed send right away?"
It's trigger-based and sends when a new listing is detected.

"Why isn't RISE showing me much yet?"
Empty records can't tell you much. Check Database Health and fill in the gaps.

"Will contacts get greetings for holidays that already passed?"
No. RISE skips any holiday whose date has passed.

The WOW moment comes from doing it.

Learn More

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