MoxiWorks

RISE Brokerage Launch Kit – Quick Guide

Your Launch Plan Checklist

BEFORE LAUNCH | **Prep & Communicate**

- [ ] Send teaser email to agents: “Something new is coming”
- [ ] Admin: complete RISE admin training — confirm MLS connection is active
- [ ] Admin: build brokerage-wide task automation Campaigns in draft (Lead, Nurture, Buyer, Seller)
- [ ] Admin: prepare Just Listed and Just Sold campaign templates for brokerage-wide deploy
- [ ] Admin: review Market Insights setup — confirm Insights Location fields are populated on contacts
- [ ] Send second teaser email: “Less work. More flow.”
- [ ] Confirm all agents have login credentials and know their access date

LAUNCH DAY | **Go Live**

- [ ] Send launch email: “Moxi RISE is live — log in and take the first step”
- [ ] Host a 30–45 min live kickoff — demo the Dashboard, Board, and one Campaign
- [ ] Admin: activate Just Listed and Just Sold Campaigns brokerage-wide via Send As
- [ ] Share agent quick-start checklist: log in ▯ turn on a Campaign ▯ classify 10 contacts
- [ ] Post RISE support link in your team channel: rise-moxiworks.zendesk.com
- [ ] Drop the RISE learning channel link: education.moxiworks.com

POST LAUNCH | **Drive First Wins**

- [ ] Send “Start with 3 things” follow-up email to agents who haven’t activated yet
- [ ] Run a 20-min office hours session focused on Campaigns — walk through Just Listed setup live
- [ ] Admin: deploy task automation Campaigns via Send As — use “Only new contacts in Stage” if
- [ ] agents have existing manual tasks
- [ ] Encourage agents to classify contacts as Buyer, Seller, or Both in their Board view
- [ ] Share Market Insights campaign setup guide
- [ ] Identify your 3–5 “champion agents” — high adopters who can model the platform for peers

LONG TERM | **Sustain & Expand**

- [ ] Schedule a 30-day check-in — review logins, active campaigns, and agent questions
- [ ] Agents: complete contact data hygiene sprint — add birthdays, anniversaries, and missing zip
- [ ] codes
- [ ] Introduce Presentation Builder for listing-focused agents
- [ ] Activate Market Insights campaign for agents with sufficient location data on contacts
- [ ] Champion agents: ask them to share one win in team meeting (“RISE helped me…”)
- [ ] Revisit platform roadmap with CSM — new features roll out monthly, early adopters benefit most
- [ ] Begin the 6-Week Agent Engagement Email Series — send one email per week from brokerage leadership to build database habits, segmentation, and consistent outreach

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FAQs

Will my contacts already be in RISE when I log in?

They might be. If your email account was setup in Engage your contacts migrate automatically at first login. You will start from your existing database with no re-entry needed. If you never connected your email in Engage you will need to connect your email to sync your contacts. Spend your first week reviewing and classifying contacts as Buyer, Seller, or Both, since that's what drives targeted automation.

Do I need to swtich everything over at once?

No. Start with two or three high-value actions: log in, turn on Just Listed, and classify your contacts. Early wins matter more than full adoption on day one. The platform is designed so you can add automation and features gradually — and it compounds over time as your data gets cleaner.

I used Engage – where did my tasks go?

Your Engage task plans don't carry over automatically, but the same behavior is built into RISE via Campaigns. A Campaign with a Stage Change trigger and Create Task actions is the direct equivalent of an Engage task plan. Your admin will build and deploy these — ask them to confirm which Campaigns are active for your account.

My contacts are not receiving Market Insights, why?

Market Insights requires an Insights Location (zip or postal code) on the contact record. If that field is blank, RISE will skip that contact. Do a spot check on a few contacts to confirm the field is populated. Add the missing location data to your contacts by doing a quick data cleanup sprint and contacts will start receiving this scheduled campaign at the next send.

My tasks stopped appearing part way through a campaign, is it broke?

Not necessarily — this is likely working as intended. If your Campaign has a Delay block followed by a Stage condition, and the contact moved to a new stage during the delay, RISE correctly stops the automation. This prevents Lead tasks from firing for a contact who is now Hot. Check the contact's current stage against the Campaign conditions to confirm.

Can I personalize content before it goes out?

Yes. Campaign content can be previewed, edited, and refined before you activate it. Check with your admin on the level of personalization available for each campaign type deployed via Send As.