

# RISE Sales Manager Guide

A concise overview of the value of RISE, why it matters now, and how to coach agents to adopt it with confidence.

**RISE is not just a new interface. It is a platform shift that makes automation, AI, and faster agent execution part of the daily workflow.**

## What RISE Is—and Why It Matters

RISE is MoxiWorks' next-generation platform built foundation with AI and developed from the ActivePipe codebase. It combines contact management, automated marketing, AI guidance, presentations, and mobile productivity in a more modern experience.

Value Area	What Changes for Agents	Why Managers Should Care
<b>Automation</b>	Core campaigns can be turned on quickly and continue working in the background.	Managers can position RISE as a time-saver, not another task list.
<b>AI guidance</b>	Proactive cards and AI chat surface next-best actions and help agents execute faster.	Supports coaching at scale by reinforcing good habits inside the platform.
<b>Better data</b>	Buyer/seller classifications, surveys, and smart groups make the database more actionable.	Cleaner data improves campaign targeting, follow-up, and pipeline visibility.
<b>Presentations</b>	Seller CMAs and other presentations are faster to build and easier to personalize.	Gives agents a practical way to win more listing conversations.
<b>Mobile access</b>	Agents can work contacts, notes, media, and presentations from the field.	Improves consistency and follow-through away from the desk.

## How to Position RISE with Agents

*RISE is designed to help you work smarter, not add complexity. Start with a few automations, clean up your contacts, and let the platform begin surfacing opportunities for you. The value builds quickly once your data and campaigns are active.*

Lead with this	Why it resonates	Manager note
<b>“This will help you automate consistent follow-up.”</b>	Agents understand the pain of staying visible with their database.	Focus on ease and consistency before talking about advanced AI.
<b>“This gives you smart prompts so you know where to focus.”</b>	Agents want help prioritizing, not more dashboards to check.	Tie proactive cards to daily action and follow-up discipline.
<b>“This will make your presentations and listing prep faster.”</b>	A tangible business outcome lands better than specific product feature.	Use CMAs as a proof point for value, especially with listing-focused agents.
<b>“You can manage key tasks from your phone.”</b>	Mobility matters to agents who spend their day in the field.	Encourage app adoption early so usage becomes habitual.

**RISE is less manual follow-up, better organization, faster presentations, and a smarter system that improves as agents use it.**

## What Should Agents Do First?

1. Log in and access the platform.
2. Turn on at least one automated campaign, ideally Just Listed and/or Just Sold.
3. Review contacts, add known birthdays and anniversaries, and classify contacts as Buyer, Seller, or Both.
4. Download the mobile app and login.

## Coaching Tips for Stronger Adoption

- Lead with saved time, consistent follow-up, and better agent visibility—not feature overload.
- Show one or two practical wins first. Example: an automated campaign and a faster seller CMA workflow.
- Reinforce that better contact data improves results. Clean data is what makes automation and AI more useful.
- Position RISE as a platform that will continue to improve monthly, so early adoption compounds over time.

## FAQs

Question	Answer
<b>Will my contacts already be there?</b>	Yes. Contacts migrate automatically after first login, so agents can begin working from their existing database.

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<b>Do I need to switch everything at once?</b>	No. Start with a few high-value workflows and build from there. Early wins matter more than full adoption on day one.
<b>Can I still personalize campaigns?</b>	Yes. Campaign content can be previewed, edited, and refined before launch.
<b>Why should I move now if more features are still coming?</b>	Because the sooner an agent starts building clean data and active automation, the more value they will get as new features roll out.