

EPISODE 1177**[INTRODUCTION]****0:00:010**

Whitney Sewell (WS): This is your Daily Real Estate Syndication Show and I'm your host, Whitney Sewell. Today is a Highlights show that's packed with value from different guests around a specific topic.

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[INTERVIEW 1]**0:00:23**

WS: Our guest is Megan Brown. Thanks for being on the show, Megan.

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Megan Brown (MB): Thanks for having me, I'm happy to be here.

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WS: Help us to think more about how to do more with less manpower. I know that's a specialty that you have and let's jump into that.

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MB: Yeah, I think automation is really a great way to do it so whenever I start out, I was a one-man band and I had to figure out how to make this work a little bit better to do, again, more with less because the problem with growing is when you hire people, you kind of need to have to work in the revenue to get them there but if you want to hire a full person, you need a full person's worth of work most of the time before you hire them.

How do you bridge that gap between one to two people, especially when you're newer and doing it? And that's where having automation, having smart messaging can help you out -- to do more with less so a lot of people will have those smart messages that they send. A lot of people now will use cowardly or other booking options that they can use which is great but then it kind of takes away the back and forth and the rapport that you're trying to build with a prospect and so then if you're able to use AI to do that booking, what people can do is have a conversation. I use appointment booking because it's something that everybody has to, right?

We all have to book appointments and it takes up a lot of time of back and forth if you're doing it manually of hey, every Tuesday and Thursday at three, oh no, what about Friday at four, that's where we have those booring pages that people can just kind of find a time and select but it's very impersonal.

What we can do with AI is we can have that kind of messenger bot understand what people are doing. A lot of people have seen those on Facebook messenger or many chats where you can provide options or other things like that but with AI, you can ask someone when are they available, the AI will then go to their calendar and then check it.

It understands basically the way that humans would talk and so we might say, I'm available Thursday at three or you know, what about a week from today and so the AI would be able to understand that a week from today would be Tuesday at about 10 AM central time and check the calendar and go through, it's a much more normal flow of what we're used to in talking with humans and it removes that impersonal thing of well, here's my booking link, go book a time.

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WS: Nice, you know, I've heard numerous times, people say, it's so impersonal when I get that link, somebody says, I'd love to talk to you, here's my link, right? I've had people do that to me obviously and sometimes it's just the easiest way, you know? But it is impersonal, it does take that out, you know? That's interesting, does that bot, I mean, I've seen those on websites as well.

Is it speaking to them like it is someone or does that person know that it's like AI and a robot that they're communicating with?

0:03:16

MB: Yeah, I've been playing around a little bit with, it's Google dialog flow and so it's a learning bot and so what you do is you talk for the bot and then the bot learns the way that you talk, and then it will be able to imitate that and understand what you're saying to be able to send that back. They wouldn't necessarily know that it is a bot because it's not like the bot most people use where it will have the three typing dots and then it's like here are three times that are available, it's much more conversational.

0:03:48

WS: Wow, that's so interesting and something maybe the listener and myself should consider looking into. Anything else, any other software, any other things that you use just to create that system or process that's going to help us to do more with less?

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MB: The biggest thing that I've done is I've taken that bot and then integrated it into text message capabilities, right? We all – most of us are on messenger but pretty much every cellphone now can do text messages and that's a really good way to communicate with people and a really good way to get response rates and so our email gets so junked up with all the things I think I have 43 unread messages right now but if we have that text back and forth then you can implement the bot with that.

Then it really allows you to be much more robust with your system and with what you're able to do via text messages with people or even you know, if a lead comes in and you need to talk with them, having your marketing system, your software call you and let you know you have that lead to press one to connect to try to get on the phone with them as quickly as possible before they go talk with some other investor, right?

Because the normal flow of things is people decide "okay, I'm ready to pull the trigger, I want to start investing," and they're going to maybe reach out there to people. And most of the time, they're going to go with that first person that talks with them.

The immediate response is very important if you want to book those appointments and close more of your prospects.

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WS: Can you elaborate a little bit more there on what is that system will help us to do the taxing with the bot as well?

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MB: Yeah, it's just a system for agencies that I license and use for my clients and basically, it's called rail and text messaging and basic CRM and click files and landing pages and email follow-ups all rolled into one that I can license it out to clients, I have follow-ups already built. I work with a lot of multi-family properties.

Helping them book appointments to tour apartments and so I have a whole bunch of flows set up for them already that they can purchase their license from me to do it and so it's just an agency software that we can build out and license and what people use and it's very customizable. You can find out more of that if you want to at 98full so that's 98full.com and you can see how I'm using it for multifamily housing to help them improve their occupancy rate.

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WS: Nice, what are any other systems that you have just for systems and processes, is there a way that you document those so the whole team knows how to do those things?

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MB: One that I really love is called process street and so that one is just basically a checklist on steroids and why I like it is because I can have information for that person and then it will prepopulate forms and then it will fill in dynamic content into an email that my team can send out from my emails, So, I have written the email and then we're all familiar with the dynamic content. If one of you can fill in first name, last name but it could also be you know, what is their investment, what is their net worth, what do you need to know, what do we need to ask, you can fill in. I use it for my website clients when we need to send them their username and password.

So it builds in that dynamic content and automatically sends it out to them and they have a bunch of pre-built checklists as well that you can use and customize and so that one is really great for my team because we can use it internally and there are how-to videos and so rather than having to train someone on our system and processes, they can just run through their first checklist and we have the video. "Here is how you do this, here is how you implement it. Go ahead and go."

Or sometimes you don't run it very often and you kind of forget it has all of your information and how to do it and also what you need to do to execute that all in one and so that is a really, really great SOP software that I like to use.

0:07:36

WS: And that's Process Street.

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MB: Yes.

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WS: Okay, I am definitely going to look it up. I know the listeners will be too. Any other software that you use Megan just on the marketing side, how you automate anything, how you're communicating with clients, anything that would help the listener before we move to a few final questions?

0:07:49

MB: Yeah, so if you are looking into automation, Zapier is the king. They have come a long way from when I first started using them and so it is much more user-friendly. If you are trying to make your different applications talk so we also use Asana with my team. So if we check an item off on Asana, we can send that trigger. They call them zaps, over to Gmail or over to Process Street and integrate them in different ways and you can get a little bit more complex with WebHooks.

If it doesn't already have an integration set up but if you are trying to do more automation and have all of your apps work together, it takes time to set it up in the beginning but Zapier is amazing in the amount of time that it stays if you really do sit down and take that time to set up those automations in the beginning. So you are not just doing the same repetitive tasks over and over again.

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WS: Nice, that is a great piece of software right there. What was the other one you mentioned there, something hooks?

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MB: WebHooks. I am trying not to get too into the weeds but Zapier, you are using WebHooks without realizing it, anytime you use an API key for anything and so basically it just came out of the website and whatever that pings then it tells something else to do it and so you can think about it like sending out a fishing line, it hooks the fish and it pulls it back. So that's how different applications can talk to each other throughout the web.

And if you are familiar with Zapier and you want to get a little bit more intense, I love what's called email parsing. So what that does is if you get – say you get a lot of emails about properties that you might be willing to purchase and you want to put all of them in a spreadsheet. So if you get them in the same form, you can use email parsing to pull that data out and then send it over to Google sheets so you don't actually have to look at all of those emails.

You can put them in a file folder and never look at it, run into Google sheets and maybe run your own information on it to see if it is something that would be worth pursuing or not.

[INTERVIEW 2]

0:09:40

WS: Our guest is Chris Levarek. Thanks for being on the show, Chris.

0:09:44

Chris Levarek (CL): Thanks, Whitney. Appreciate being here.

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WS: I want to jump into your superpower and the way that you can bring the most value to the listeners and I think obviously through IT and systems, I want to dive into some of the processes or systems that you have automated things that you have and just really jump into

the things you use to automate and those that made your life easier, maybe that's helped you to scale those thoughts. But first, maybe you could just start with what are some systems that you've automated and help us to get to thinking that way and you help see. You're the IT expert, help us to think that way as well.

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CL: Sure, yeah. So, there are a million-and-one apps out there, right? So, it's about finding out what your need is, what are you trying to solve initially? And then what's going to make your life easier. So, what do you not like doing? A lot of times we'll hire VAs because we just want – virtual assistants. We just want them to take away our problems and do the stuff we don't want to do. Sometimes you can do that with an application, right? You can do that with a system. So, it's about defining the process, coming up with a process map, a workflow of something you're trying to accomplish, and then finding a tool that does it.

So, some of the tools that we use, for example, Zapier is a big one. I'm sure people have heard of that. But all that does is it links together applications and makes them – it does API calls, basically, which is just a fancy way for telling an application to do something. And so Zapier, for example, how we use that tool, we have Slack channel, Slack is a message, a team collaboration communication tool, just like Skype.

And what we have going on is when say someone on our website submits a website request form for contacting us, it notifies in Slack in a specific channel, a notifications channel that says, "Hey, someone reached out via a website." And you'd be like, "Oh, well, that's not that big a deal. I mean, not really cool." Yes, well, if you don't know that somebody contacted you, and among the hundreds of emails, that might get missed, and then what's your follow up rate with that person, that's going to be a little lower.

So, Zapier can be really cool in that regard. It can send automated emails. Another interesting one, emails come in, you get a lot of contracts, you get a lot of paper documents, you don't want to lose track of – we have Zapier scraping email and dumping it to a Google Drive. So, then I never lose my documents, because they're always getting stored, does someone need to go back and clean that up and organize it sure, but at least they don't have to go through all the emails looking for that one attachment that was important for me to find.

So, couple of tools like that, we like to use Pipedrive too. Pipedrive manages deal flow for raising capital, closing deals, closing some kind of sales process with people. So, you can create basically different columns representing workflow. And you can have automations at each one of those columns. Emails that can be sent, a task that can be created. So, if I move this deal to a different column, this person, this contact to a different column, and that column represents something, certain automations can be triggered, such as add to my calendar, a

task that says follow up in a week. That can be really useful if you want to make sure you don't miss that contact in a week.

There are things like that. We use Zapier as well, when Calendly comes in, we get notified in that. But Calendly is great for scheduling meetings. So, I'm sure a lot of people on the show heard of Calendly before, there are a couple tools like it, but being able to provide a link, a hyperlink to someone via an email and when they click it, they can see your weekly schedule, that's a great one as well.

And the last one I like to is monday.com and it's a little pricier but what it really does is it brings team collaboration together. Another big one that that competes is Asana, and it's basically a giant project management tool, it can couple as a CRM. So, just manage your contacts. That's what a CRM is, just managing your contact database and then having certain advantages there. But monday.com has been great for our team. We have about eight people now working together.

So, to be able to create a board that is what they are, they're just a giant dashboard. If you can imagine that with a bunch of information on there that you can assign tasks to people, you can assign dates to people, you have automations in there. So, when this date happens, this gets assigned to this person or it gets moved in different directions. So that can be huge to collaborate together on rather than just do it via email, or just do it via Excel spreadsheets or something like that.

Well, I'll mention one last one, the Google Suite is great. If you're just starting out in business, for the price of what you can get with the Google business suite, you get from Google Voice to Google Keep for just note-taking. But then you get all the emails, the Google Drive, what am I missing? I mean, there's a lot there that you can use in a team setting and that's a big one to start with.

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WS: I've got a few questions about some of those things there and those processes that you do there. But one thing I wanted to ask, you know you mentioned, like monday.com and Asana, it's something that we've had to go through personally as well. And even learning Asana, you know, just diving into that as a team. Why did you choose to say monday.com over Asana? And then and also, have you looked into this new one I've heard recently called ClickUp?

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CL: ClickUp, I have not heard of ClickUp. No, I've been so focused on learning the ones we have. So, we chose monday.com primarily because of the ease of use. And when you're

picking an app, there's kind of a couple of things, a lot of people would just look at the price, but the price is really secondary if it doesn't achieve the objective. So, what's the need, what's the cost, of course is useful, but then who's going to be using it? So, I'm working with my family, my older brother, he's ex-Special Forces, Ashton Levarek and he's on a couple of other podcasts. He is not as familiar with tech as I am. So, if I tell him to come in — here's a great tool and he can't use it easily and it doesn't make sense and it's not clickable and draggable, then that might not be a good tool for our team. Just because I can use it doesn't mean it's going to help our team if no one else can use it easily.

I found Asana is very moldable. You can make it do what you want. But monday.com was a little more ease to use, click, drag and drop, plug and play, a little easier just to get started and that's kind of how we ended up with that tool.

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WS: Yeah, it's very important. I feel like there have been times where I've hesitated to jump into a program just because like the time it's going to take me to learn it. But a lot of that's because either I fear that there's going to be another program, or maybe another one, I want to look into that I think maybe better. What I've had to learn though is the most important part is that you use it, right? You use one. I mean, if you have one and like you said, you can't understand it or other people in your team can't understand it, even though you think it may be amazing. But what good is it, right? Pick something and dive in and use it. It's unfortunate if you do have to switch down the road, but you know, you're going to be better off either way.

So, Chris, what are some processes that, you know, specifically, that you use while using these tools? I love knowing about tools like that, that automate things and lessen our workload but also help us to be more accurate. There are fewer manual entries on different levels, which helps us work faster and more efficiently. What are some of those processes, specifically, that these things are helping you to do specifically in the syndication business?

0:17:01

CL: Sure. So, another great one, I didn't mention, I'll bring up real quick, Lucidchart. So, it's a very cheap tool, but what it will allow you to do is come up with a process map, just bubble, bubble, arrow, bubble, that kind of thing. And so, we use that to develop the process, first of what we're trying to achieve. So, let's just say if I need to raise a million dollars, then I know that I have these specific dates to hit, and I have a contact that's going to go through a certain process in how I'm talking to them. So, if they reach out in step one, and via LinkedIn, via the website, via social media, then what happens in step two, what happens in step three, and so first, I'm going to draw out the process map.

So, we have that, for example, we're doing a campaign right now where we form contacts with LinkedIn, and then we will have contact information taken and step one, then we'll have a template, as an email, that gets triggered to go to step two, the contact is then moved to step two being a column in Pipedrive, for example, and then in that list, we're waiting for a call in Calendly. When the call comes in via Zapier, that this Calendly has been scheduled, they'll move to process step three. We'll have a call. But after I'm done with the call, the notes are taken in Pipedrive, and then my VA at that point actually does go in and triggers an email to go after the call with here's a bunch of information about a blog we're on and here's information about – we're not talking to deals at all at this point anyway because we're doing 506(b)'s, so we're really just looking at building that relationship.

Then that response email goes up after the call. And then we're going to follow up in about a week or two with, "Hey, do you want to have another call or hear some more information." And then maybe we go into talking with a deal after that point. So, it's just coming up with that process and which tools are going to be doing that.

So, in step one, we're using LinkedIn to get the information, we're building a contact list in Pipedrive, which is going to automate emails to be sent because they're new contacts, they'll be emails being sent. Calendly, when they click that link, that's an email it's going to be making that call. Calendly is going to trigger Zapier to go to Slack, tell us the call was made, it gets put on our calendar that makes a task in Pipedrive because Pipedrive syncs with the calendar. And now you start to see, okay, what I have to do as the person raising capital, all I have to do is log into my Pipedrive, and I see a list of tasks for the day. So, I see my calendar — I see my tasks for that day says to do, and it's pulling all these things for my Google Calendar so I have all these automatically linked processes that I can follow going through my day.

So, it's just about building that flow of something like that, and then executing on what you need to do in your role versus going and doing all those little pieces and you're just flustered when you get to the call.

0:19:49

WS: No, that's awesome and I love how you just walked through that and this system to that system. Tell me though, like, I feel a listener or some listeners probably confused about Pipedrive versus monday.com, and are they connected?

0:20:01

CL: I'm actually always looking at combining systems and trying to get — you know, down to something, to one dash or one platform. Monday.com, we were already using Pipedrive at the time. So, monday.com can do some of what Pipedrive can do. It takes a little more

configuration, so you really want to have someone who can dive in and configure monday.com to do what Pipedrive can do. But if to put it in a nutshell, they're going to fill a specific role.

So, we'll say Pipedrive controls sales workflow, monday.com is general project management. Could it do what Pipedrive does? Yeah, it could do it. It has automation. You could get contacts put into monday.com as a CRM, a giant database of contacts. Content resource management's what CRM means. So, just a general database of data that you modify and control. So, you could do what Pipedrive is doing. But we'll say Pipedrive's to sales, monday.com is project management, Zapier is the automation, you got Calendly being the meeting, scheduling, and you know, Google and email and you can do a lot with those tools to build a business, to generate sales, that kind of thing.

But yeah, there's a lot of overlap in certain areas. I think we could combine Pipedrive and monday.com. Another big one I'm liking right now is called Active Campaign. A lot of people here in the syndication space use that as well. And it's combining pieces of MailChimp. We use MailChimp as well, by the way, which is just a marketing email application that you're able to send large-scale emails to multiple users in a database. But yeah, so Active Campaign is a big one that people are hearing about. It's combining pieces of that Pipedrive, pieces of that monday.com and MailChimp into one tool. And so yeah, if you can get behind one tool and get it to do everything you want, that's going to be really good for everyone working in the business. The catch here is if that one tool goes away, or gets bought out or breaks, you are really susceptible to that chain.

[END OF INTERVIEW]

[OUTRO]

00:22:04

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