



# Road Map to Success

## Making the Most of iConnect

### WEEK 1

#### Account Setup

[Click here](#) to request your account.

#### Upload Your Contacts.

Upload as a csv file to upload multiple contacts.

#### Set-up birthday and holiday emails in Concierge for all clients.

[How to Set Up Automatic Birthdays](#)

#### TIP

In contacts, check "ALL" to send to all groups.

### WEEK 2

#### Send I've Moved Email and/or Postcard

to past clients and Realtors letting them know you're with AFN.

[How to Send Email](#)

[How to Send Postcard](#)

### WEEK 3

#### Set Up Newsletters

**Clients** – Monthly (AFN Connection)

**Realtors** – Weekly and Monthly Newsletter Options (AFN Connection, Social Media, Industry Related)

**How to Find:** Email Campaigns > Newsletters > Weekly or Monthly

### WEEK 4

#### Set Up Email Campaigns

**Past Clients** – Past Clients Campaign

**Prospects** – Prospect for Purchase Campaign (48 week)

**Realtors** – Drip Email Campaign to Realtors (12 week or 12 month)

### WEEK 5

#### Start Co-Branding

**Add Partners** under Marketing > Partners.

[How to Add a Realtor Partner](#)

Try Creating Open House Flyers

[How to Create Open House Flyers](#)

#### TIP

Check Yes for "Active" Field for partners.

