

Why this walkthrough matters:

This guide is part of your Daily Success Plan and is essential for making the Prioritized View: [Monday: Realtor Check-Ins](#) work properly in Shape.

In order to see your top agents and referral prospects prioritized each week, you'll need to enhance their records with **Classification** and **Partner Status** values.

Following this walkthrough ensures you're spending time with the right partners—based on real data.

Here is a guideline to classify your **Agents with existing relationships**:

1. **Whales** (Sent you at least 1 loan/month or 10 loans/year over the past year)
2. **Tuna** (Sent you 2 loans/quarter or 8 loans/year over the past year)
3. **Tilapia** (Sent you at least 1 loan/quarter or 4/year over the past year)

Next step is to add Prospects/Targets into Shape that you want to get in the upcoming year.

Step 1: Data Enhance realtors in Shape using RETR

Lookup the Agent's production from the past 12 months. This can be found in RETR.

Within Shape, go to Prioritized View and choose the dropdown Referral Partners >> [All Referral Partners](#)

We are going to add the following data fields from RETR into the agent's record in Shape:

- Total Volume \$
- Seller Count
- Buyer Count
- (Optional) RETR profile link

Lookup the Agent's record in RETR:

Agent Performance Summary (12 Months)

	Sides	Volume	Avg Price
Buyer Side	183	\$50,354,291	\$606,678
Seller Side	42	\$30,880,560	\$735,251
Total	125	\$81,234,851	\$649,879

Legend: Current 12-month Period (Blue), Prior 12-month Period (Grey)

Switch back to Shape and enter the data values. (system will auto-save)

Referral Metrics

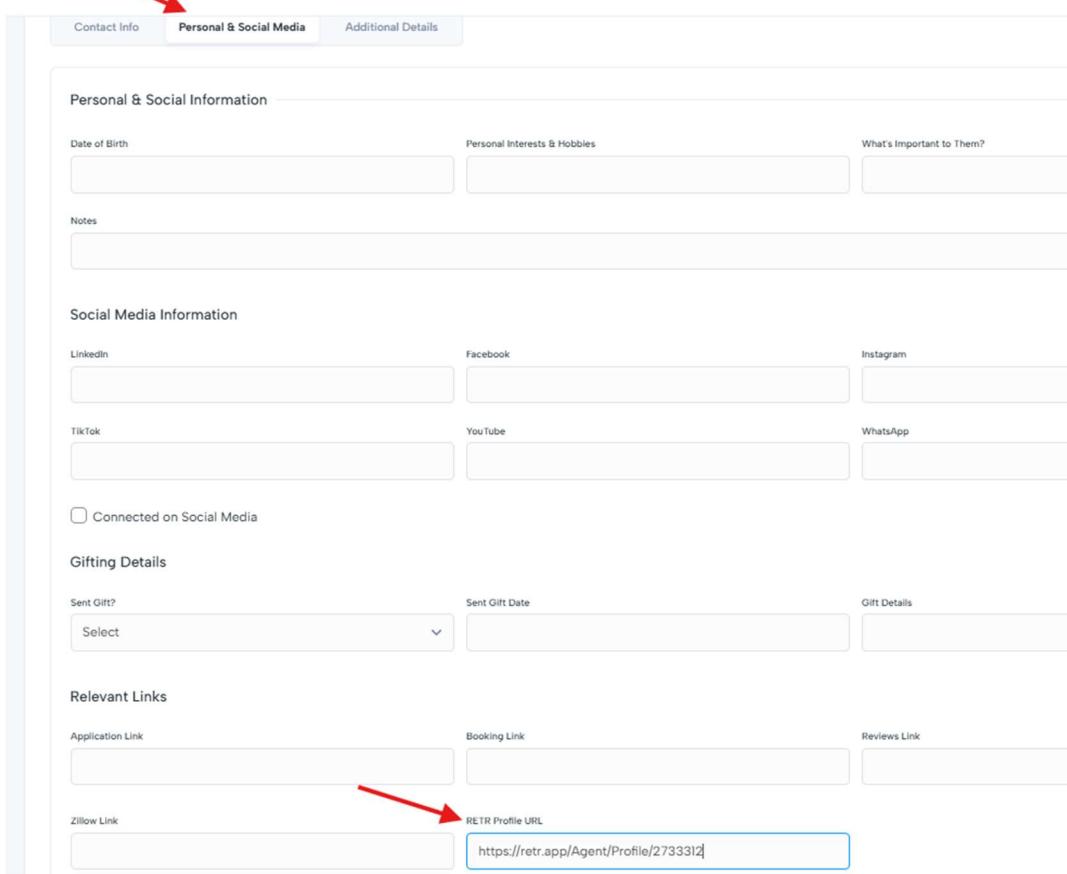
Overall Rank	Production Volume	Market Share	Referral Volume
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Realtor Details

Listing Side	Buyer Side	Double Side	Sold Count
Seller Count	Seller Volume	Buyer Count	Buyer Volume
Loan Count	LO's Used		

(Optional Step) Add the URL Link to their RETR profile for future reference.

This data field is in Shape under the tab called Personal & Social Media:



Personal & Social Media

Personal & Social Information

Date of Birth

Personal Interests & Hobbies

What's Important to Them?

Notes

Social Media Information

LinkedIn

Facebook

Instagram

TikTok

YouTube

WhatsApp

Connected on Social Media

Gifting Details

Sent Gift?

Sent Gift Date

Gift Details

Relevant Links

Application Link

Booking Link

Reviews Link

Zillow Link

RETR Profile URL

Watch this 2-minute video demonstration

Step 2: Apply Statuses in Shape

In order for the new Prioritized View **Monday: Realtor Check-Ins** to work properly, be sure all your Realtor records in Shape contain values for:

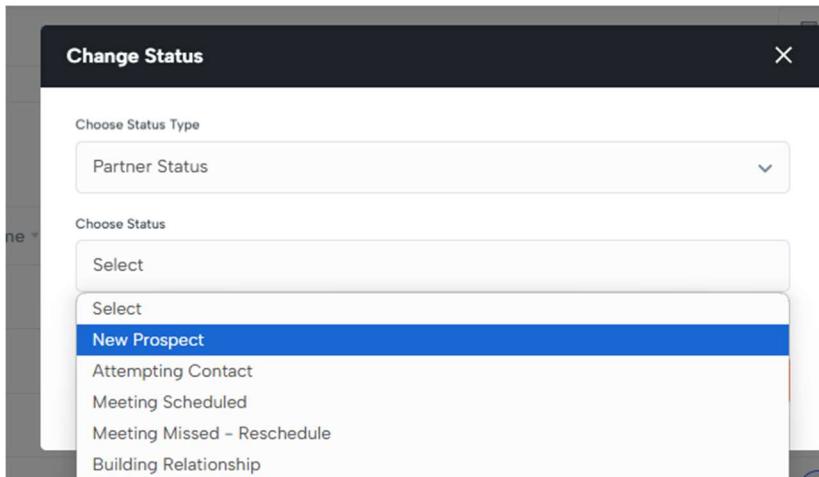
- Partner Status (New Prospect)
- Classification (Whale, Tuna, Tilapia)

You can either update Status one-by-one on the list view, or by BULK ACTION:

4. Check the checkboxes to select the records to update
5. Go to BULK ACTIONS > Change Status

CLASSIFY & STATUS YOUR AGENTS

6. Select PARTNER STATUS. Select Value from dropdown. Click APPLY button.

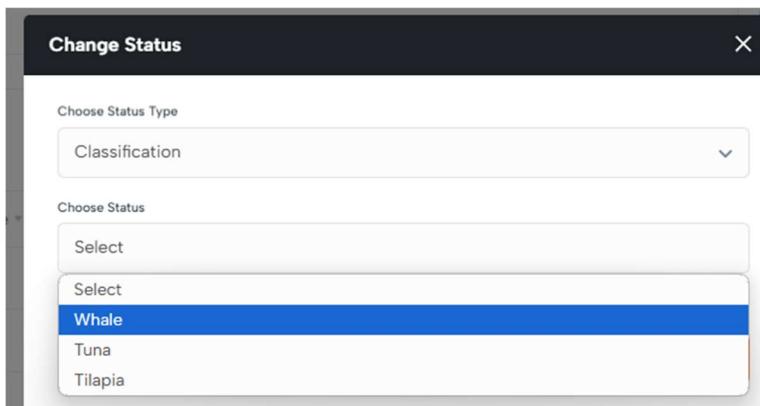


7. Repeat. Go to BULK ACTIONS > Change Status

8. Select CLASSIFICATION. Select Value from dropdown. Click Apply button.

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Targets/Prospects – use the same classification based on their annual





CLASSIFY & STATUS YOUR AGENTS

[Watch this 2-minute video demonstration to bulk update Classification](#)