

⚠ 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.

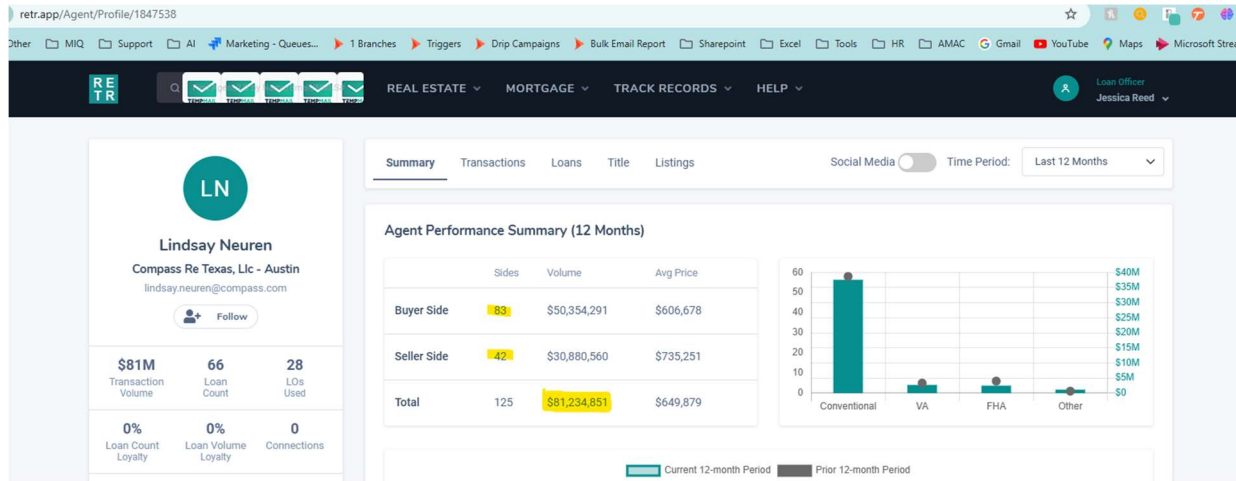
Within Shape, go to Prioritized View and choose the dropdown Referral Partners >> **All Referral Partners**

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:

CLASSIFY & STATUS YOUR AGENTS



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

Partner Information Referral Tracking Notes Contact Log Tasks Calendar Activity Uploads Custom

Contact Info Personal & Social Media **Additional Details**

Referral Metrics

Overall Rank **Production Volume** Market Share Referral Volume

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:

The screenshot shows the 'Personal & Social Media' tab selected in the Shape system. The form is divided into several sections:

- Personal & Social Information:** Includes fields for Date of Birth, Personal Interests & Hobbies, What's Important to Them?, and Notes.
- Social Media Information:** Includes fields for LinkedIn, Facebook, Instagram, TikTok, YouTube, and WhatsApp.
- Gifting Details:** Includes a dropdown for Sent Gift?, a field for Sent Gift Date, and a field for Gift Details.
- Relevant Links:** Includes fields for Application Link, Booking Link, Reviews Link, and Zillow Link.
- RETR Profile URL:** A field containing the URL `https://retr.app/Agent/Profile/2733312`, highlighted with a red arrow.

[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:

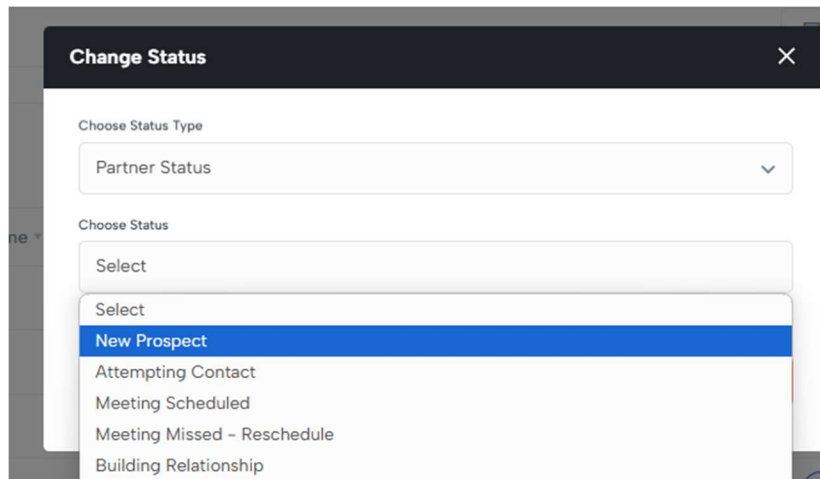
- Partner Status (New Prospect)
- Classification (Whale, Tuna, Tilapia)

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.



The screenshot shows a 'Change Status' modal window. Under 'Choose Status Type', 'Partner Status' is selected. Under 'Choose Status', a dropdown menu is open showing options: 'Select', 'New Prospect' (highlighted in blue), 'Attempting Contact', 'Meeting Scheduled', 'Meeting Missed - Reschedule', and 'Building Relationship'.

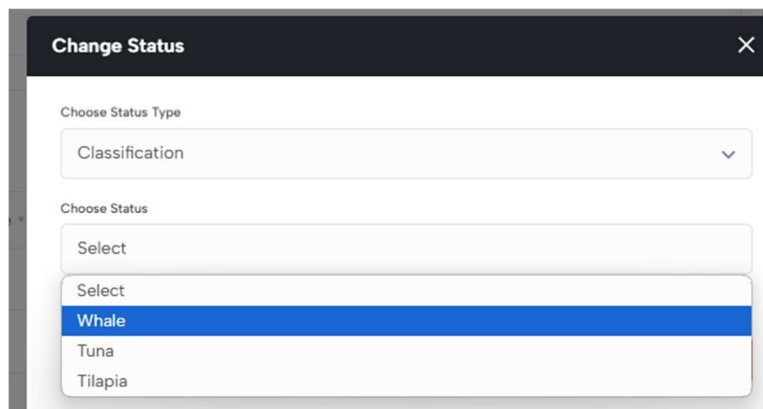
7. Repeat. Go to BULK ACTIONS > Change Status

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

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



The screenshot shows the 'Change Status' modal window. Under 'Choose Status Type', 'Classification' is selected. Under 'Choose Status', a dropdown menu is open showing options: 'Select', 'Whale' (highlighted in blue), 'Tuna', and 'Tilapia'.



CLASSIFY & STATUS YOUR AGENTS

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