CLASSIFY & STATUS YOUR AGENTS

⚠️ **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

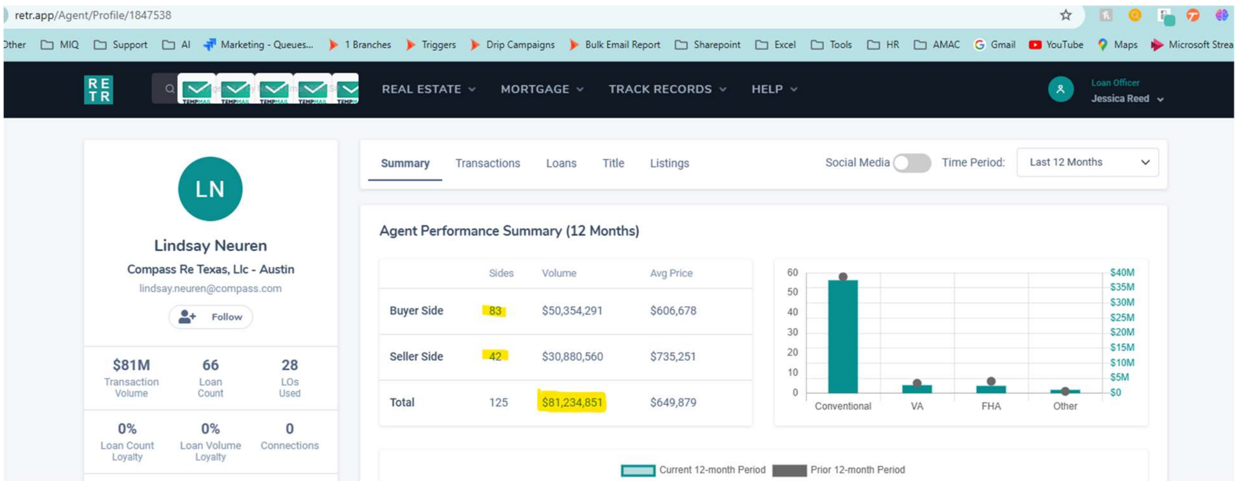
Lookup the Agent's production from the past 12 months. This can be found in RETR.

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

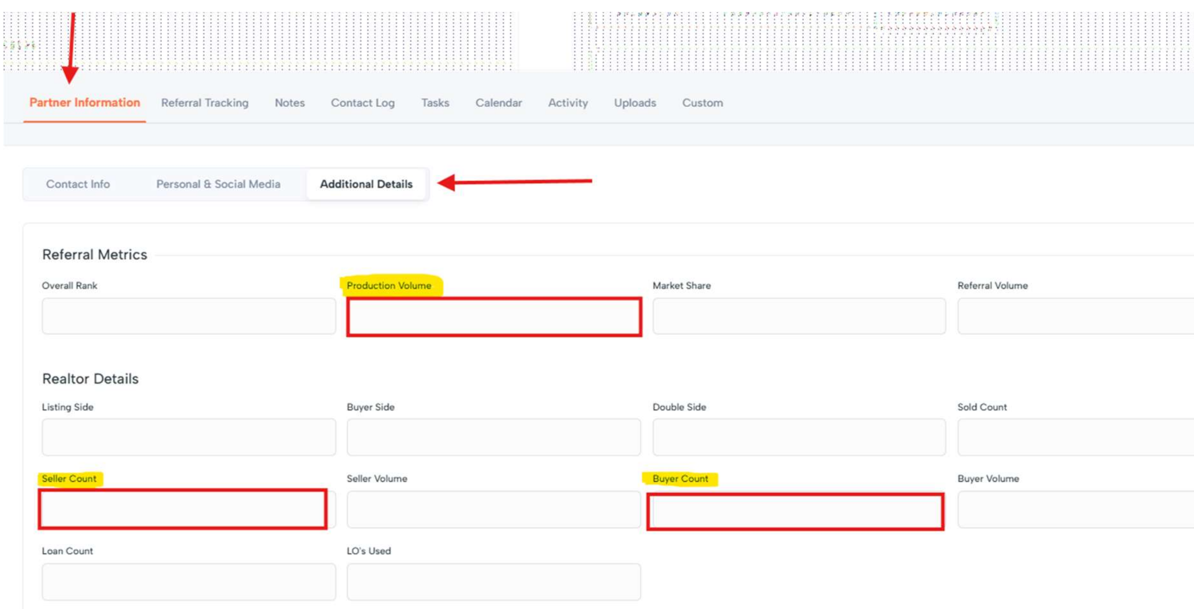
We are going to add the following data fields from RETR into the agent's record in Shape:

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

Lookup the Agent's record in RETR:

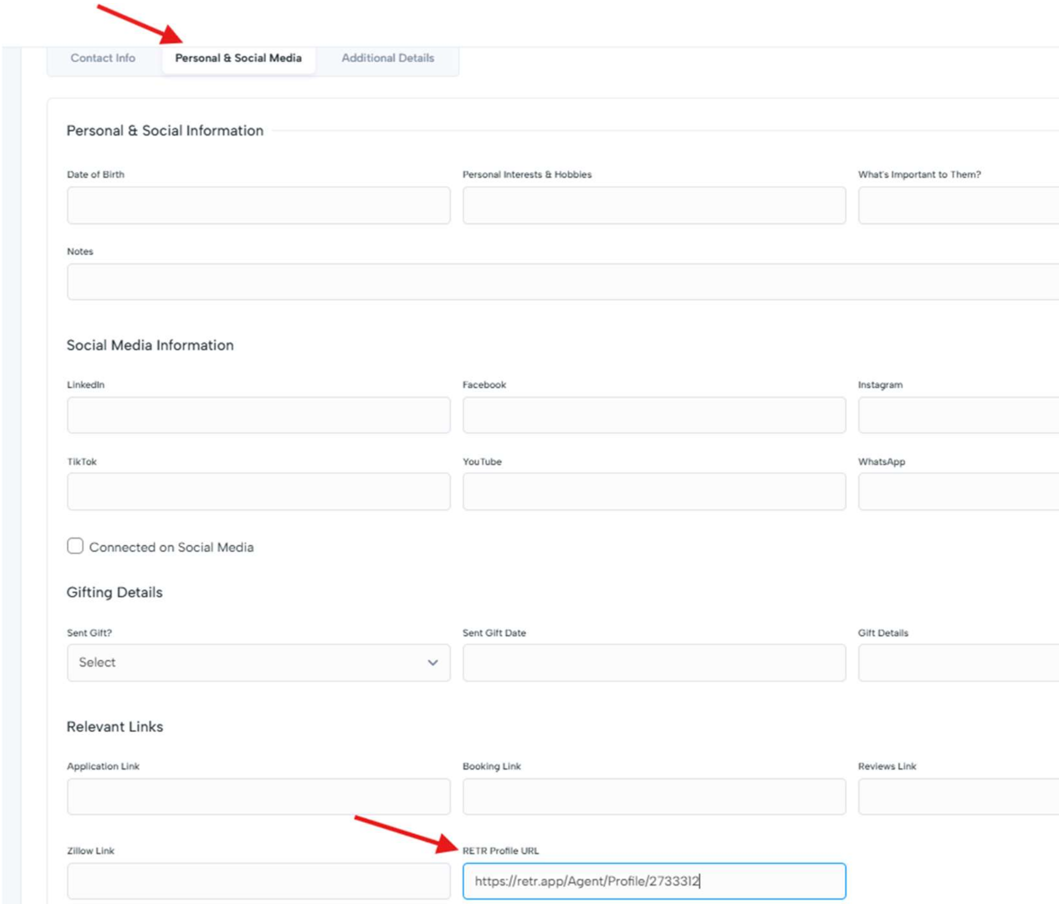


Switch back to Shape and enter the data values. (system will auto-save)



(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:



[Watch this 2-minute video demonstration]

Step 2: Apply Statuses in Shape

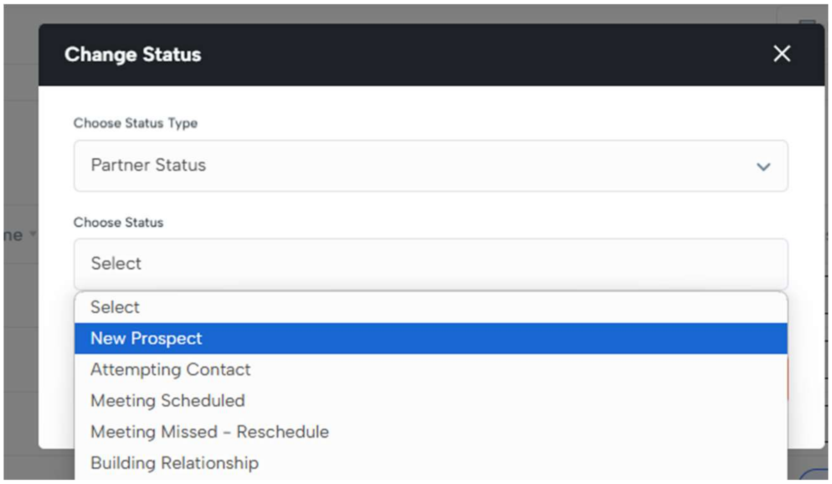
In order for the new Prioritized View **Monday: Realtor Check-Ins** to work properly, be sure all your Realtor records in Shape contain values for:

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

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

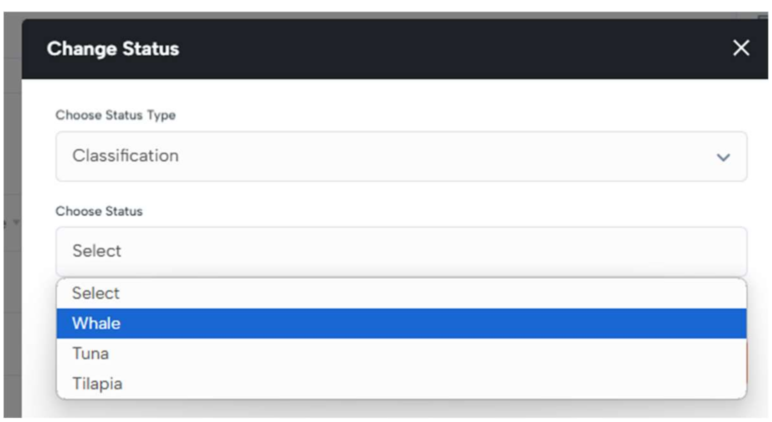
4. Check the checkboxes to select the records to update
5. Go to BULK ACTIONS > Change Status

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. Ciick Apply button.
    a. Here is a guideline to classify your existing agent relationships:
        i. **Whales** (Sent you at least 1 loan/month or 10 loans/year over the past year)
        ii. **Tuna** (Sent you 2 loans/quarter or 8 loans/year over the past year)
        iii. **Tilapia** (Sent you at least 1 loan/quarter or 4/year over the past year)

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



Watch this 2-minute video demonstration to bulk update Classification