



CHIME[®]

Agent Adoption Roadmap 2023

WHY CHIME?



Click Here

[Close More Deals Faster](#) (2 mins)

[Key Realty CHIME Interview](#) (0:39 sec)

[Win Listings with CHIME](#) (2 mins) [CHIME Awards](#) (2 mins)

[How CHIME is Different](#) (0:30 sec) [CHIME's Core Values](#) (2 mins)

[Pure Realty Case Study](#) (2 mins)

[Why Sarah Richardson Came Back to CHIME](#) (3 mins)

[KW Agent + Real Estate Coach on CHIME](#) (2 mins)

[Van Deeb - National Real Estate Coach CHIME Testimonial](#) (1 min)



Profile, Integrate Email & Calendars

1 – 3 DAYS

- Complete your CHIME CRM profile.
[Your CHIME Profile](#)
- Integrate your email & calendar with CHIME.
[Integration Resource Step By Step](#)
- Import your leads, if applicable. Scrub your contacts' email addresses & phone numbers before you import into CHIME.

[Via CSV Spreadsheet](#)
[Via Google Contacts](#)
[Email Opt-in Status](#)

Agent Self Training

4 – 10 DAYS

1. **Watch Onboarding: Agent Platform micro-videos in the [Learning Center](#).**
2. **Watch [Agent CRM Training Webinar](#) on how to utilize functions within CHIME [56 mins].**
3. **Optional – Can also watch [Smart Plans & Property Alerts Training Webinar](#) too!**

Recorded Training Library

10 – 30 DAYS

- Watch the recorded series of training sessions, starts with CHIME 101 (there are 7 recordings).
- Compile any questions that come up as you watch and email those to your owner/admin to schedule 1:1 time, if needed.
- Agents should take quarterly CHIME survey to assess training needs.

SETTINGS CHECKLIST

- [Profile](#)
 - MLS Agent ID
 - Email Signature
- [Preferences](#)
 - Time Zone
 - Working Hours (8a-8a)
- [Notifications](#) - toggle on/off
- [Auto Property Alerts, Market Snapshots, Market Reports](#) - enabled
- [Integrations](#) - email & calendar
- [Lead Capture](#) - from other lead sources (ex: Zillow, realtor.com, etc.)
- [Import Your Leads](#)
- [Welcome Emails](#) - turn on
- [Manage Dialer](#) - set your Personal Virtual Number

[Agent User Setup Guide](#)



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GET AHEAD

- Master CHIME - Watch micro-videos in [the Learning Center](#) > Onboarding: Agent Platform
- Learn how to [move leads through the Pipeline](#)
- Organize your leads - [Data Organization](#)
- Automated drip campaigns - [Learn about Smart Plans](#)

A man in a dark long-sleeved shirt is standing and presenting to a group of people seated around a table in a meeting room. The room has whiteboards with diagrams and charts. The CHIME logo is overlaid in the bottom right corner of the image.

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HAVING TECH ISSUES?

- Please consult the [Help Center](#) first.
- Email or Chat support directly. Please accompany all issues/questions with a screenshot where possible.
- 7 days a week from 8am-8pm EST.

chime.me | help.chime.me
support@chimeinc.com | (855) 981-7557

[How to Contact CHIME Support](#)

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Resources



| Chime: Agent Adoption Roadmap

[LEARNING CENTER](#)

Fundamental and advanced training programs. Learn how to get started with CHIME so you can work better, faster!

[CHIME HELP CENTER](#)

CHIME's searchable database includes articles, training videos and step-by-step instructions.

- [Agent CRM Setup & Training Guide](#)

[CHIME LIBRARY](#)

CHIME Library houses a collection of eBooks, webinars & videos, podcasts and infographics. Topics ranging from lead generation & success tips to social media.

[CHIME YouTube CHANNEL](#)

Immerse yourself in all things CHIME, with tips & tricks, industry trends, marketing tips and fireside chats with top real estate industry professionals.

[CHIME USER FORUM FACEBOOK GROUP](#)

CHIME's Official User Group. A place to collaborate and discuss general real estate topics as well as the CHIME platform.

- Please do not submit any support tickets here. This group is for agents to network with CHIME users, share best practices and ask functionality questions.



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Thank You