Listing Insights

What Are Insights?

Listing insights are automatically generated notes added to contact records that give Total Expert users more visibility to the identified contacts' life changes and improve their ability to provide timely, appropriate messaging to those contacts, helping them build lifelong relationships and drive value for those people.

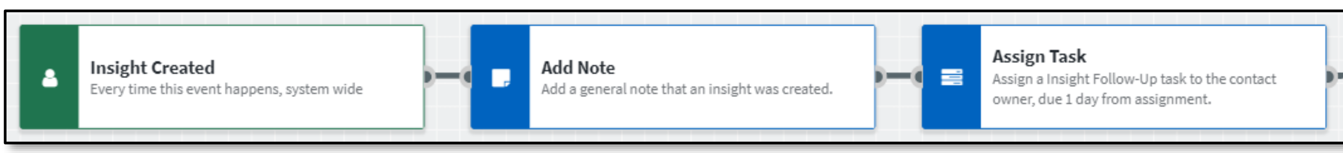
A listing insight is generated by the Total Expert platform when an address associated with a contact record is *confidently* matched to the address of a new listing in one of the many MLS databases that Total Expert integrates with. (The system attempts to standardize addresses on file for the purposes of these comparisons, but it cannot account for all variations.)

When a match is identified, a temporary note is added to the affected contact in a section called Insights. To ensure that you are presented with timely information and that your messaging is relevant, listing insights expire after 7 days. To create a permanent record of the insight, consider using a journey to create a note and a task attached to the relevant contact (see below).

Other types of insights are available, depending on your integrated services, such as Sales Boomerang or RatePlug.

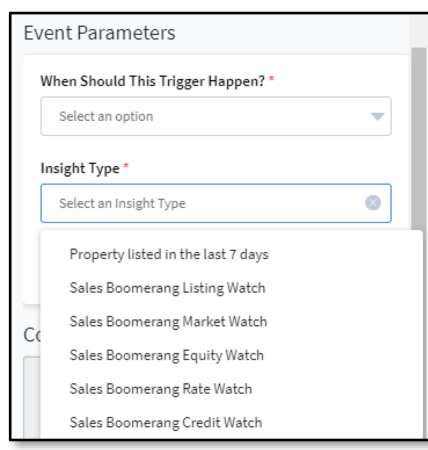
Insights and Journeys

While a listing insight is shown on a contact's details page, this could easily escape your attention, especially if you are not currently working with the contact. To make these insights more apparent, you can create a journey that adds a general note to the contact record (which does not expire) and assign a task to the owner of the contact to investigate and follow up as appropriate. Tasks are shown in the Daily Digest email sent to any subscribed users, so a user would see the task in their inbox under 24 hours after the MLS listing is created.



This could be followed up with any other appropriate steps. For example, you could add a condition that checks the affected contact record for a previous loan and automatically sends follow-up messaging accordingly.

Regardless of what you want the journey to do, when using the the Insight Created trigger, you have the option of selecting any available options, such as *Property listed in the last 7 days*, to activate the trigger. The first option in this example refers to a Total Expert–generated listing insight.

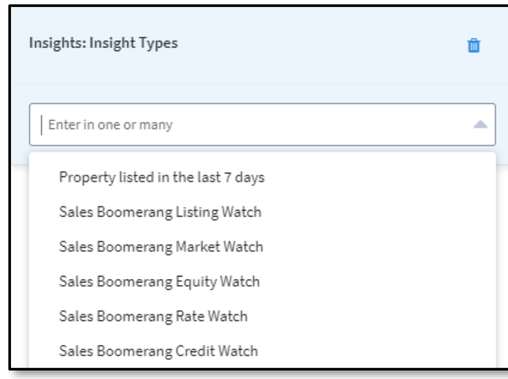


Note
Insight options are permission-controlled; check with your administrator if you do not see an option you expect.

Insights and Focused View

The focused view feature makes it easy to take advantage of insights. You can build a view with an inclusion rule based on the Insight Types option. This view would then show the user all their contacts with an active insight.

As with the Insight Created journey trigger, the Insight Types focused view rule can use any available option, based on permissions.



Note
Sales Boomerang insights do not expire after 7 days, so views based on these options would continue to show contacts with insights based on older activity.

Users with access to a focused view based on insights should monitor this view in conjunction with the information and tasks from any insight-related journeys to ensure they are able to follow up with the right people to provide timely advice.

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