LUXURY PRESENCE

Client Success Checklist

A practical plan for building useful Presence habits

01 TODAY: GET COMFORTABLE

- [ ] Log in to Presence and familiarize yourself with the main platform areas.
- [ ] Review the Content tab & confirm that your profile details are accurate.
- [ ] Download the Luxury Presence Mobile App & log in as an agent.

02 THIS WEEK: TAKE ACTION

- [ ] Create a Saved Search for a contact.
- [ ] Review your Smart Actions.
- [ ] Follow up on at least one meaningful engagement signal.

03 EVERY WEEK: BUILD MOMENTUM

- [ ] Review new contact activity & follow up with engaged contacts.
- [ ] Use Presence tools with active clients and prospects.
- [ ] Complete new Smart Actions.

04 THIS MONTH: EXPAND YOUR ADOPTION

- [ ] Explore training resources for additional Presence tools.
- [ ] Register for a Luxury Presence community event.
- [ ] Connect with your CSM about your goals, adoption, or opportunities to get more value from the platform. (If applicable)

Explore additional training at training.luxurypresence.com

LUXURY PRESENCE

Keep building from the habits you started this week

05 WHILE WORKING WITH CLIENTS

- [ ] Set up useful tools such as saved searches and listing alerts.
- [ ] Use Presence resources as part of your normal client communication.
- [ ] Ask for Google reviews & add them to your LP account

06 AS YOUR BUSINESS CHANGES

- [ ] Update your bio, contact details, social links, website content, and other business information in the content tab as needed.

07 WHEN YOU NEED SUPPORT

- [ ] Contact Support when you need technical assistance.
- [ ] Contact your CSM when you need strategic guidance. (If applicable)
- [ ] Attend another training or use on-demand resources when you want to learn a specific workflow.

MY TOP THREE GOALS FOR THE NEXT 12 MONTHS

1. _____

2. _____

3. _____

Explore additional training at training.luxurypresence.com