Avoid Fines from Violating the Telephone Consumer Protection Act (TCPA)

Why the TCPA matters to you:

You will be personally liable for any violations of the TCPA.

Fines can be as much as $500 per call or text, and add up quickly.

Before making your next call or text:

DO NOT

DO NOT use an **automated platform vendor** to call or text potential customers.

DO NOT leave pre-recorded messages.

Check phone numbers against Do Not Call Lists prior to making any calls or texting.

Get prior written consent before calling or texting a number on the **Do Not Call Lists**.

TCPA Myths Dispelled

Myth 1:

"The TCPA applies to calls, not texts."

NOT TRUE. *The TCPA covers both calls and texts.*

Myth 2:

"I checked the Do Not Call (DNC) Lists when I got the number; I'm covered."

NOT TRUE. *Numbers are added to the DNC Lists all the time. If you haven't recently checked the number against the DNC Lists, you must do so before calling or texting.*

Myth 3:

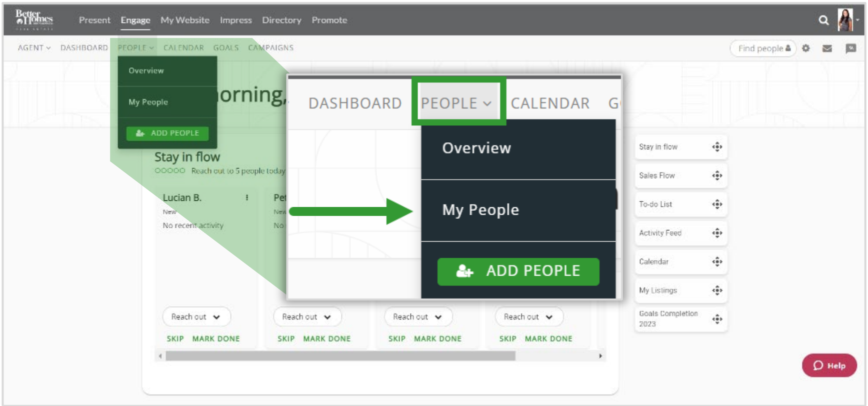
"A friend gave me this person's number, so I don't need to check the DNC Lists."

NOT TRUE. *If the person you are going to call or text did not give you the number, you must check the DNC Lists.*

Better Homes and Gardens REAL ESTATE

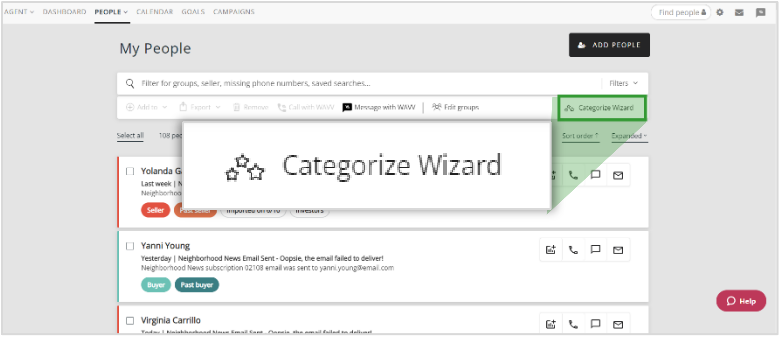
Organizing your Unorganized Contacts

When you first add your contacts to MoxiEngage®, they will be labeled as "Uncategorized". Using the built-in Categorize Wizard to identify your contact types makes it easier for you to communicate and work with them in the Sales flow.



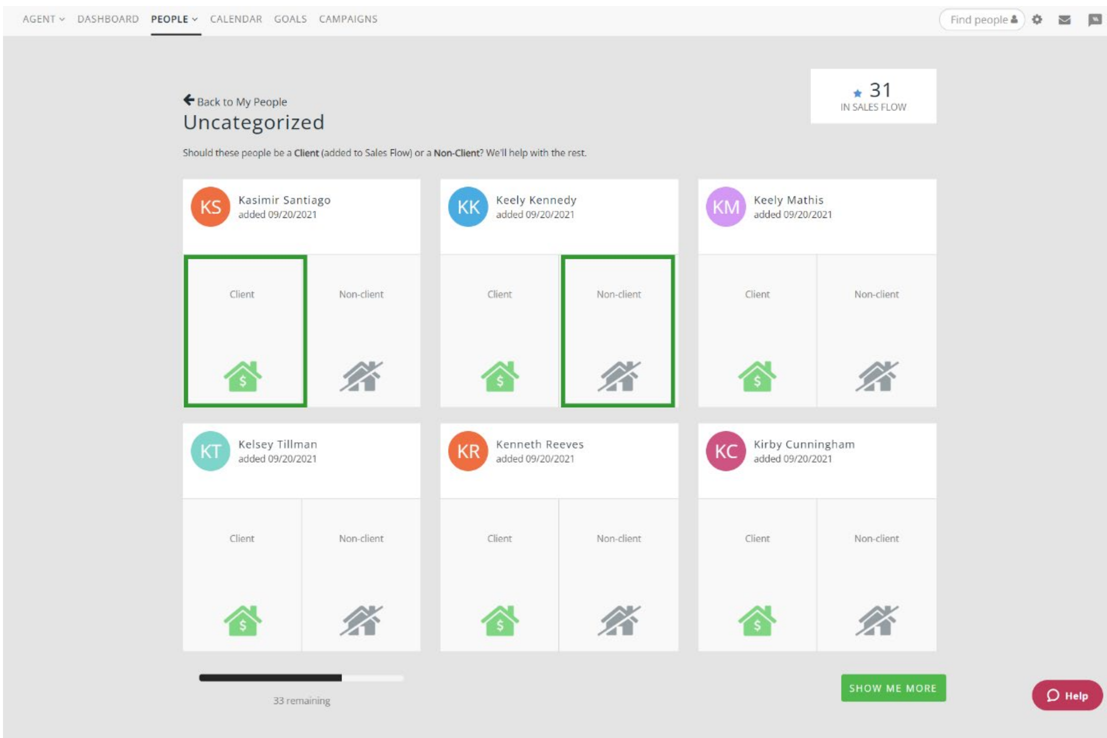
Starting from your MoxiEngage dashboard, select **My People** from the **People** menu.

From the My People screen, click **Categorize Wizard**.



Every person in your contact list is a potential client, whether they are currently pursuing a listing with you or not. Decide whether they are clients or non-clients and identify who belongs in the Marketing Zone (these are the people you are actively working to stay top of mind with) or the Prospect Zone (these are the people who have shown an interest in buying or selling).

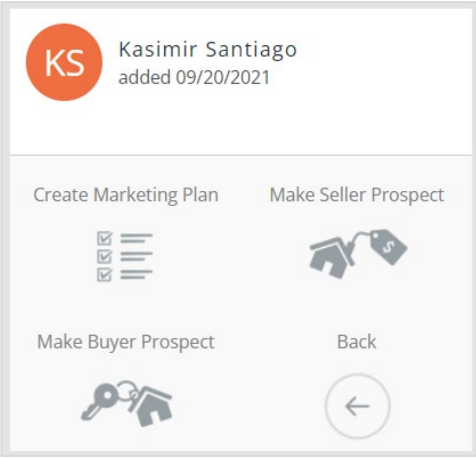
The Categorize Wizard will have you answer a series of simple questions, beginning with selecting **"Client"** or **"Non-Client"**.



***If you choose to make contact by phone or text (i) check phone numbers against the federal DNC registry, any state DNC list and your company DNC list (ii) do NOT use autodialers and (iii) do NOT use artificial voice or pre-recorded messages.**

****Emails must follow CAN-SPAM rules. You should also check to make sure you follow the Do Not Email/Unsubscribe Requests.**

For **Clients**, you can choose whether to:

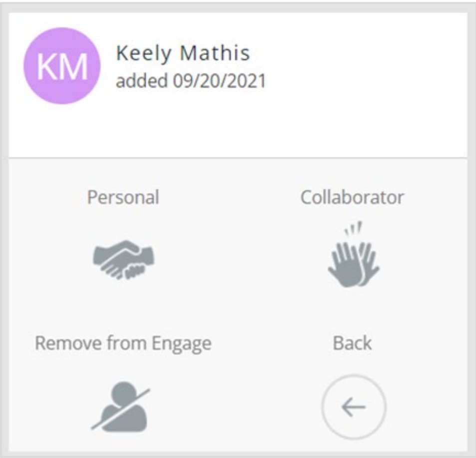


- Put them on a **Marketing Plan**
- Make them a **Seller Prospect**
- Make them a **Buyer Prospect**

These choices will put your person into the appropriate sales flow zone. You'll be able to keep track of the tasks for the zone, which will show up in the client profile as well as on your dashboard.

Click the option in the contact card and follow the prompts to finish categorizing your contact.

For **Non-Clients**, you can choose whether to identify them as:



- **Personal**: family, friends
- **Collaborator**: co-workers or vendors
- **Remove from MoxiEngage®**: remove the contact from your MoxiEngage database (will not delete from your synced email account).

For Non-Clients you can still stay in touch with listing announcements or special date emails, but they don't need to be in a sales flow and won't appear in the Stay in Flow module on your dashboard.

Click the option in the contact card and follow the prompts to finish categorizing your contact.