BoldTrail
Real Estate's Growth Engine

From First Contact to Closed Deal:
The System Behind Smarter Conversations

Before switching to BoldTrail, Tiffany's team was managing chaos—juggling spreadsheets, notebooks, and various CRMs, with no unified system.

"As a team leader, I had agents that were using all different CRM platforms. We were kind of in a hodgepodge of programs or spreadsheets, and BoldTrail brought us all together to one uniform place. It's created a lot of organization, throughout, kind of like a universal conversation that happens on a week-by-week basis between, leadership, and the team agents, and also helps with organizing follow-up, and really even lead distribution as well."

— Tiffany Klusacek

Tiffany Klusacek
Team Leader

Ashlee Janakovich
Realtor®

The Challenge: Siloed Systems, Scattered Communication

Each agent operated independently, using their own tools to track leads and manage clients. For leadership, that meant no shared visibility—and no way to scale with consistency.

"We were busy. **And before switching to BoldTrail, it wasn't just busy, it was chaotic.**"

— Tiffany Klusacek

The Shift: Unifying Systems with One Platform

With BoldTrail, Tiffany's team centralized all communication, lead follow-up, and reporting in one platform. Smart automations created accountability while saving time.

"As a team leader, my favorite feature, and really flow of sequence of events is the automated follow-up when I'm placing leads throughout my team, **knowing that there's already going to be tasks that are assigned, for that agent, to complete in order to kind of help me keep them accountable.** I think that that's been a really big gamechanger as we switch to using BoldTrail as a team."

— Tiffany Klusacek

The Agent Experience: Organized, Trackable Conversations

For agents like Ashlee Jankovich, BoldTrail eliminated the guesswork— and the notebook.

"As an agent, BoldTrail helps solve the problem of the gaps that I was missing through my conversations with clients. It's really helped me stay on top of conversations. It helps me stay organized. **And prior to using BoldTrail, I was using a different CRM and a notebook. So this helps me keep everything all in one place without having to go to different avenues to stay on top of my business."**
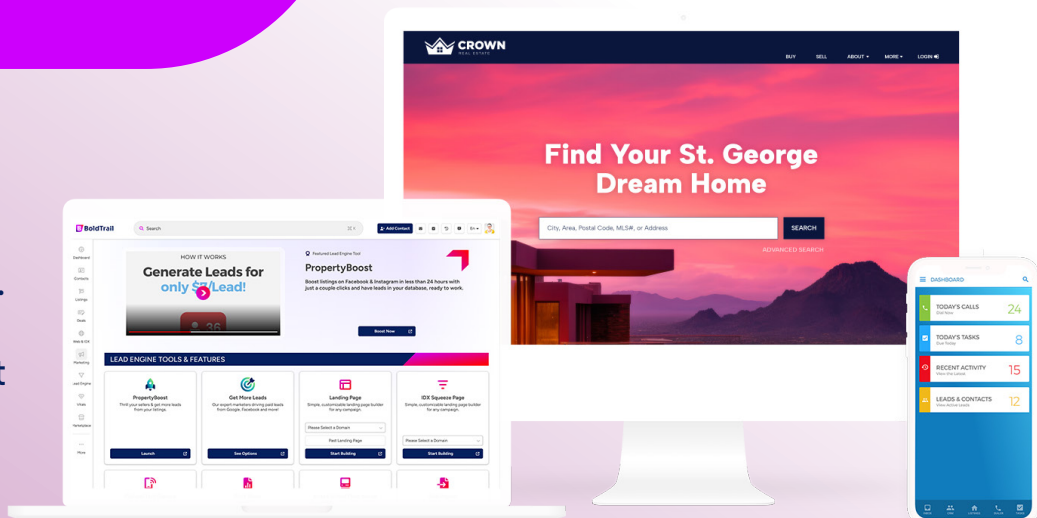
— Ashlee Jankovich, Agent

3x

BoldTrail Drives 3x the Conversations

Through Strategic Outreach, Automated Drip Campaigns, AI–Powered Behavioral Insights, & Lead Concierge Service

Agents have more conversations, faster— because follow–up is no longer a guessing game. BoldTrail's ecosystem ensures no lead gets left behind.
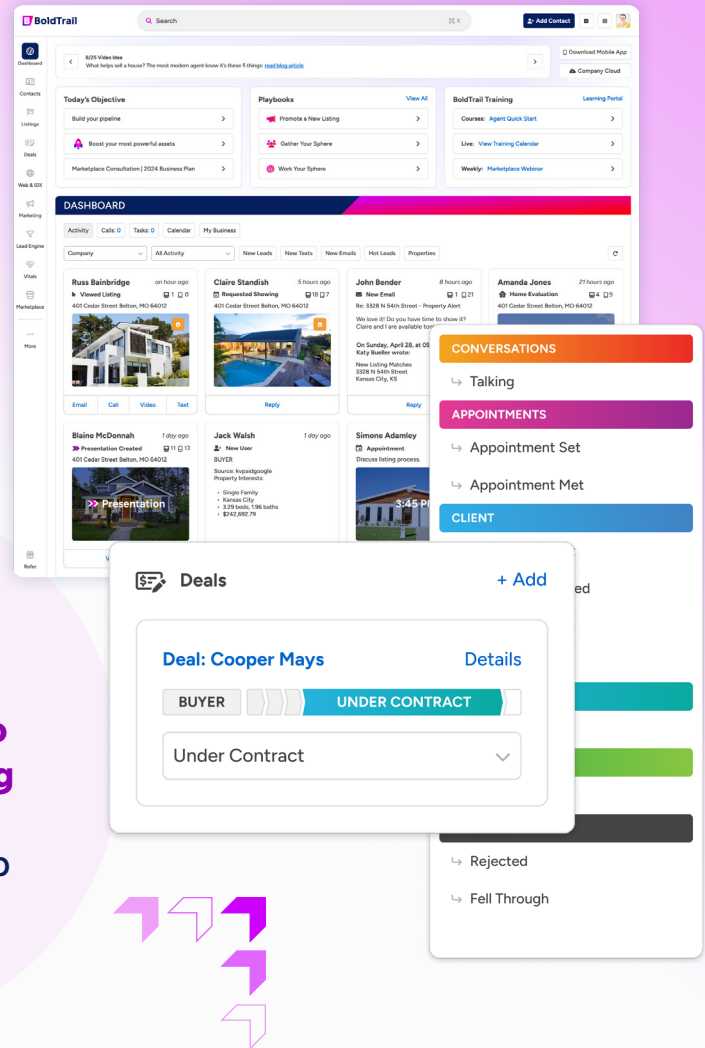
From Data to Direction: Insights That Drive Action

The platform's dashboards offer instant insight into lead status and next steps, keeping agents proactive and accountable.

"As an agent, my favorite feature in BoldTrail is actually looking at the metrics at the top of **my dashboard** because this **tells me exactly who needs to be on a search, who needs to be on a campaign, who's missing information.** And it gives me that 'kick in the gut' to do my job and do my follow-up because **the numbers don't lie.**"

— Ashlee Jankovich

Support That Goes Beyond Setup

BoldTrail's onboarding and success teams ensured not just adoption, but real results.

"Over the years, in leadership, I have been the problem in adapting to programs, adapting to systems. And I think that one of **the big game-changers for me with BoldTrail is the super friendly, approachable, and helpful staff.** That is something that I have not seen in the other platforms. **Just really in-depth support, and they want to see us succeed from a staff level.**"

— Tiffany Klusacek

The Results

- ✓ **One shared system** for the entire team
- ✓ Structured, **automated follow-up**
- ✓ Visibility into **agent performance and lead flow**
- ✓ **Clear accountability** for both agents and leadership
- ✓ A scalable, **organized foundation for growth**

Ready to Replace Chaos with Clarity?

BoldTrail unifies your real estate business—from lead to close—so you can **scale with confidence.**

GET A DEMO!

BoldTrail