

FUB Cheat Sheet

Top Expectations:

1. Call through lists #1-6 daily
2. Log call notes
3. Change stage & action plan will auto apply
4. Keep inbox, today's tasks, and overdue at a 0 daily
5. Try 10 times to reach a lead via phone call

Daily Flow in order of importance

There are other items besides smart lists in the daily flow

1. **Smart List: Active & Pending Clients:** "active" and "pending" stages. Static list, will never be 0
2. **Inbox**
3. **Smart List: New Leads No Call Attempt** "lead" stage only. This list should always be very short. These are less than 14 days old. Sorted by newest to oldest. Calls made is less than 1
4. **Smart List: New Leads Not Reached** "lead" stages only. This list should always be very short. These are less than 14 days old. Sorted by newest to oldest. Calls made more than 0. Last communication more than 1 day ago.
5. **List: Back to Website:** excludes "hot" "active client" "pending" and "contact" stages. Back to website or re-engaged in past 14 days that have not been talked to in past 14 days
6. **Tasks**
7. **Smart List: Hot/Weekly** "Hot" stage only. Last communication more than 7 days ago. Sorted by last talked to.
8. **Smart List: Warm/Bi-Weekly:** "Warm" stage only. Last communication more than 14 days ago Sorted by last talked to.

****If you have time, prospect these lists***

9. **Smart List: Cold/Bi-Monthly:** "Cold" stage only. Last communication more than 60 days ago Sorted by last talked to.
10. **Smart List: Old Leads - No Contact Attempt:** "lead" stage only, 0 call attempts. These are more than 14 days old. Sorted by newest to oldest.
11. **Smart List: Old Leads - Not Reached:** "lead" stage only, at least 1 call attempt. More than 14 days old, last call attempt more than 30 days ago. Sorted by last talked to.
12. **Smart List: Past Clients/Sphere Quarterly** "Sphere" and "Past Client" stages only, set for quarterly follow up.

Stages definitions

Lead: Lead not reached but continuing to try

A - Hot 1-3 Months: Buying or selling in less than 3 months

B - Warm 3-6 Months: Buying or selling in 3-6 months

C - Cold 6+ Months: Buying or selling in 6+ months

Renter - future buyer: Only wants to rent for now, nurture into a buyer

Active Client: Current buyer or seller client you are working with/signed client

Pending: Offer accepted, waiting to close

Past Client: Bought or sold with you & you want to keep in touch

Sphere: Personal relationships

Contact: No longer going to try, removed from smart lists, removed from drips. This can be people who have an agent, not interested, already bought, under your price point, out of your service area, etc.

Trash: "Delete"

Closed: Past client you don't want to stay in contact with

Recruiting: Agent you've connected with to recruit to your team or brokerage

Stages that will trigger automations

Stage Name (s)	Condition	Action Plan
Hot, Warm, Cold	Must be tagged buyer	*KTS Nurture Buyer
Hot, Warm, Cold	Must be tagged seller	*KTS Nurture Seller
Hot, Warm, Cold	Must be tagged buyer/seller	*KTS Nurture Buyer + Seller
Hot, Warm, Cold	Must be tagged expired	*KTS Expired
Hot, Warm, Cold	Must be tagged fsbo	*KTS FSBO
Renter - future buyer	n/a	*KTS Renter to future buyer
Past Client	n/a	*KTS Post Closing
Sphere	n/a	*KTS Barry Jenkins Partnership 3 Year Sphere Nurture
Contact, Active Client	n/a	Auto pauses action plans
Recruiting	n/a	*KTS Recruiting
Active Client, Pending, Contact	Only for Conversion Monster Clients	Cm-stop tag is added
Hot, Warm	Only for Ylopo clients	NOTEXT tag is added, but the agent is held accountable. If agent drops ball, Raiya will be

		allowed to re-engage
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Tags that will trigger automations

Tag Name	Condition	Action Plan
Buyer	Must be staged hot, warm, or cold	*KTS Nurture Buyer
Seller	Must be staged hot, warm, or cold	*KTS Nurture Seller
Buyer/seller	Must be staged hot, warm, or cold	*KTS Nurture Buyer + Seller
expired	Must be staged hot, warm, or cold	*KTS Expired
fsbo	Must be staged hot, warm, or cold	*KTS FSBO
Post closing legacy	n/a	*KTS Post closing legacy
Unresponsive	n/a	*KTS Stale

*A portion of the scripting for the emails is courtesy of [Exactly What to Say for Real Estate Agents](#) by Phil M. Jones, Jimmy Mackin, and Chris Smith

*Barry Jenkins has generously provided some email drip content as an exclusive partnership with Kee Technology Solutions. KTS does not compensate nor receive compensation for using Barry's drips. We only request you take a look at Barry's new guide, "Too Nice For Sales: <https://www.tooniceforsales.com/>

Important points to remember

1) Calling

- a) ALWAYS log a call (green, not yellow) AND ALWAYS add note if you leave a voicemail or have a conversation

2) Disposition

- a) Tag "buyer" "seller" or "buyer/seller" if they're both so that the automation triggers correctly. For "buyer/seller" the "buyer" & "seller" tags must be removed
- b) Make sure all contact info is in FUB – phone, email, address, source
- c) Stage – change the stage after you speak to lead to appropriate stage (see above) – use dropdown list

3) Setting Following Up

a) Add follow up task or use a smart list if there's no specific time to follow up or you don't reach the lead.

4) **Close** emails and texts once it's taken care of in the inbox. Make is a goal to have less than 5 in the inbox.

Detailed List of Action Plans and Automations

Action Plans	Associated Automation Trigger	Definition
*KTS Back to Website	Existing Lead views a property on your IDX.	<p>Tries to re-engage a colder, existing lead via a 6 month drip based off of their website activity.</p> <p>In video library: Time stamp 2:02: https://www.loom.com/share/58916122cfe342f19bb151ae66fbc531?t=123</p> <p>Action plan video: Time stamp 4:20: https://www.loom.com/share/6b65ce35059347299e0f155aa706161a?t=258</p>
*KTS New Home Valuation	Automated via Lead Flow for brand new leads entering your database	<p>New home value sources will be added to this action plan automatically. Lasts one year.</p> <p>Intended for online leads that push to FUB automatically. Do not manually apply drip. If you need to use this manually, please talk to our team. The action plan merge fields need to be adjusted</p>
*KTS New Buyer Lead	Automated via Lead Flow for brand new leads entering your database	<p>New buyer lead sources will be added to this action plan automatically. Lasts two years</p> <p>Intended for online leads that push to FUB automatically. Do not manually apply drip. If you need to use this manually, please talk to our team. The action plan merge fields need to be adjusted.</p> <p>You may see several variations of the new buyer lead action plan. The variations alter what the initial email & text say to ensure it makes sense & is relevant to what the lead is inquiring about.</p> <p>Video library time stamp 4:43: https://www.loom.com/share/6b65ce35</p>

		059347299e0f155aa706161a?t=283
*KTS Branded Website	Automated via Lead Flow for brand new leads entering your database	<p>New leads from your website or another real estate website with general inquiries or minimal information. This is usually used for leads who fill out a contact us form.</p> <p>Intended for online leads that push to FUB automatically.</p> <p>You may see several variations of the branded website action plan. The variations alter what the initial email & text say to ensure it makes sense & is relevant to what the lead is inquiring about.</p> <p>View in video library time stamp 12:04: https://www.loom.com/share/6b65ce35059347299e0f155aa706161a?t=724</p>
*KTS New Open House	Automated via Lead Flow for brand new leads entering your database	<p>New open house attendees will be added to this list automatically. Lasts one year.</p> <p>*DO NOT MANUALLY APPLY THIS DRIP. THIS DRIP ONLY WORKS FOR LEADS AUTO-PUSHING TO FUB VIA A FORM FILLED OUT OR AN APP SUCH AS OPENHOMEPRO, SHOWABLE.CO, SPACIO, ETC) IF YOU NEED MANUALLY USE THIS, PLEASE TALK TO OUR TEAM. THE ACTION PLAN MERGE FIELDS NEED TO BE ADJUSTED.</p>
*KTS New Seller Lead	<p>Automated via Lead Flow for brand new leads entering your database</p> <p>If you generate ZBuyer cash seller leads, the Zbuyer version will trigger</p>	<p>New general seller sources will be added to this action plan automatically. Lasts one year</p> <p>Intended for online leads that push to FUB automatically. Do not manually apply drip. If you need to use this manually, please talk to our team. The action plan merge fields need to be adjusted.</p> <p>You may see several variations of the new seller lead action plan. The variations alter what the initial email & text say to ensure it makes sense & is relevant to what the lead is inquiring about.</p> <p>In video library: https://www.loom.com/share/6b65ce35059347299e0f155aa706161a?t=326</p>
*KTS New Zillow, Realtor, Trulia Lead	Automated via Lead Flow for brand new leads entering your database	New buyer lead plan that will be added to this action plan automatically. Lasts

		<p>one year.</p> <p>Intended for online leads that push to FUB automatically. Do not manually apply drip. If you need to use this manually, please talk to our team. The action plan merge fields need to be adjusted</p> <p>In video library time stamp: 5:50: https://www.loom.com/share/6b65ce35059347299e0f155aa706161a?t=351</p>
*KTS Nurture Buyer	Existing lead changes stage to “hot” “warm” or “cold” and has “buyer” tag. Also triggers if “buyer” tag is added & stage is “hot” “warm” or “cold”	<p>After talking with a buyer lead, not ready to go right now. Works for any timeline - 1 month, 6 months, 12 months, etc. Lasts two years</p> <p>In video library watch video about all nurture automations: https://www.loom.com/share/58916122cfe342f19bb151ae66fbc531?t=246</p> <p>Action plan video: https://www.loom.com/share/6b65ce35059347299e0f155aa706161a?t=387</p>
*KTS Nurture Seller	Existing lead changes stage to “hot” “warm” or “cold” and has “seller” tag. Also triggers if “seller” tag is added & stage is “hot” “warm” or “cold”	<p>After talking with a seller lead, not ready to go right now. Works for any timeline - 1 month, 6 months, 12 months, etc. Lasts two years</p> <p>In video library watch video about all nurture automations: https://www.loom.com/share/58916122cfe342f19bb151ae66fbc531?t=246</p> <p>Action plan video: https://www.loom.com/share/6b65ce35059347299e0f155aa706161a?t=387</p>
*KTS Nurture Buyer + Seller	Existing lead changes stage to “hot” “warm” or “cold” and has “buyer/seller” tag. Also triggers if “buyer/seller” tag is added & stage is “hot” “warm” or “cold”	<p>After talking with a lead that’s both buying & selling, not ready to go right now. Works for any timeline - 1 month, 6 months, 12 months, etc. Lasts three and a half years</p> <p>In video library watch video about all nurture automations: https://www.loom.com/share/58916122cfe342f19bb151ae66fbc531?t=246</p> <p>Action plan video: https://www.loom.com/share/6b65ce35059347299e0f155aa706161a?t=387</p>
*KTS Renter to Future Buyer	Stage is changed to “Renter - future buyer”	A short series of emails over the course of one year to stay in touch with a renter about potentially buying in the future

		<p>In video library time stamp 7:39: https://www.loom.com/share/58916122cfe342f19bb151ae66fbc531?t=459</p> <p>Also here: https://www.loom.com/share/6b65ce35059347299e0f155aa706161a?t=561</p>
*KTS Expired	Existing lead changes stage to “hot” “warm” or “cold” and has “expired” tag. Also triggers if “expired” tag is added & stage is “hot” “warm” or “cold”	<p>After talking with an expired/canceled seller. A 2.5 year drip to nurture a seller not quite ready to work with you</p> <p>In video library time stamp 14:10 - https://www.loom.com/share/6b65ce35059347299e0f155aa706161a</p> <p>And here time stamp 22:42 - https://www.loom.com/share/58916122cfe342f19bb151ae66fbc531</p>
*KTS FSBO	Existing lead changes stage to “hot” “warm” or “cold” and has “fsbo” tag. Also triggers if “fsbo” tag is added & stage is “hot” “warm” or “cold”	<p>After talking with an FSBO seller. A 2.5 year drip to nurture a seller not quite ready to work with you</p> <p>In video library time stamp 16:13- https://www.loom.com/share/6b65ce35059347299e0f155aa706161a</p> <p>And here time stamp 23:54 - https://www.loom.com/share/58916122cfe342f19bb151ae66fbc531</p>
*KTS Post Closing	Existing lead changes stage to “Past Client”	<p>Almost 8 years worth of emails providing educational home maintenance content, and automates requesting a review</p> <p>In video library time stamp 8:39: https://www.loom.com/share/58916122cfe342f19bb151ae66fbc531?t=519</p> <p>In video library time stamp 7:07: https://www.loom.com/share/6b65ce35059347299e0f155aa706161a?t=427</p>
*KTS Stale	Existing lead adds tag “Unresponsive” This happens automatically at the end of the new buyer & new seller action plans	<p>12 months of emails to try to re-engage stale, old leads one last time. Automated at the end of a new lead plan if the lead hasn’t been reached</p> <p>In video library time stamp 11:31: https://www.loom.com/share/58916122cfe342f19bb151ae66fbc531?t=691</p> <p>Also here time stamp 8:38: https://www.loom.com/share/6b65ce35059347299e0f155aa706161a?t=518</p>
*KTS Pause Action Plans	Stage is changed to “contact” or “active client”	Pauses all action plans to avoid new lead & nurture lead action plans from continuing to run

		<p>Video library time stamp: 10:52: https://www.loom.com/share/58916122cfe342f19bb151ae66fbc531?t=652</p>
*KTS Barry Jenkins Partnership 3 Year Sphere Nurture	Stage is changed to sphere	<p>Three year sphere action plan</p> <p>Video library: https://www.loom.com/share/86fa445b56a04494a57be5be92e2acea?t=75</p>
*KTS 5 Year Home Anniversary	Anniversary date is today	<p>5 year home anniversary drip *DO NOT MANUALLY APPLY THIS DRIP. PLEASE WATCH THE AUTOMATION VIDEO IN THE VIDEO LIBRARY.*</p> <p>In video library time stamp:12:54: https://www.loom.com/share/58916122cfe342f19bb151ae66fbc531?t=718</p> <p>Also here time stamp 9:48: https://www.loom.com/share/6b65ce35059347299e0f155aa706161a?t=588</p>
*KTS Recruiting	Stage is changed to recruiting	<p>Just over one year of recruiting emails intended for agents you've spoken to</p> <p>In video library time stamp 21:05: https://www.loom.com/share/58916122cfe342f19bb151ae66fbc531?t=1265</p> <p>Also here time stamp 12:30: https://www.loom.com/share/6b65ce35059347299e0f155aa706161a?t=750</p> <p>This is a default action plan as of February 2023. If you do not have the action plan, please request it.</p>
*KTS Sphere	Stage is changed to sphere	<p>Adds a sphere tag to lead to ensure they are excluded from future automations such as: Back to website, nurture buyer, nurture seller, homebot engagements</p> <p>In video library time stamp 9:39: https://www.loom.com/share/58916122cfe342f19bb151ae66fbc531?t=579</p>
*KTS Homebot Engagement	Existing lead engaged with Homebot by viewing the digest online. Stage is "lead" or "cold" no talked to in at least 60 days.	<p>Tries to re-engage a colder, existing seller lead via an 8 month drip based off of their homebot activity</p> <p>In video library time stamp 13:43: https://www.loom.com/share/58916122cfe342f19bb151ae66fbc531?t=821</p> <p>Also here: https://www.loom.com/share/6b65ce35059347299e0f155aa706161a?t=750</p>

		059347299e0f155aa706161a?t=692 Note: this also works for homeequity.watch which is available in Canada & USA. If you add on this service, please let us know
*KTS Post Closing Legacy	Triggered by tag "post closing legacy"	Omits the first two emails in kts post closing drip, including the review request email to help keep in touch with older clients. This is a default action plan of the setup as of February 2023. If you do not have the action plan, please request it. In video library time stamp 21:39: https://www.loom.com/share/58916122cfe342f19bb151ae66fbc531
*KTS tag buyer	Automated via Lead Flow for brand new leads entering your database	New buyer lead entering your account that was a live phone call lead such as a Zillow live trader, OJO, Opcity. Tags the lead as buyer, but does not initiate drip. Requires the assigned agent to log call notes from conversation & change the stage to trigger the appropriate automation
*KTS tag seller	Automated via Lead Flow for brand new leads entering your database	New seller lead entering your account that was a live phone call lead such as a OJO, or Opcity. Tags the lead as seller, but does not initiate drip. Requires the assigned agent to log call notes from conversation & change the stage to trigger the appropriate automation
*KTS New Renter	Automated via Lead flow for brand new leads entering your database	New renter lead sources will be added to this action plan automatically. Lasts a little over one year Intended for online leads that push to FUB automatically. Do not manually apply drip. If you need to use this manually, please talk to our team. The action plan merge fields need to be adjusted.
*KTS New Zillow Flex	Automated via Lead flow for brand new leads entering your database	New buyer lead plan that will be added to this action plan automatically. Lasts one year. Same action plan as *KTS New Zillow, Realtor, Trulia except source name is manually typed in as "Zillow" to avoid the action plan from saying "Zillow Flex". This is intended for Zillow Flex users - sometimes Zillow pushes leads to

		<p>FUB and labels the source name as Zillow Flex</p> <p>Intended for online leads that push to FUB automatically. Do not manually apply drip. If you need to use this manually, please talk to our team. The action plan merge fields need to be adjusted</p>
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