The SELLING Team's system for effective Lead Management

The SELLING Team: Lead Management Standards and Protocol

This document outlines the system, processes, and expectations for effective lead management using the team's primary CRM.

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1. Lead Management System Overview

All agents must utilize The SELLING Team's Lead Management System, **Follow Up Boss (FUB)**, to a high level.Daily Responsibilities

- **Input Notes Daily:** All interaction notes and updates must be logged daily into the CRM.
- **Scripts:** The agent is required to masterfully utilize approved scripts to convert the lead into a client.

2. Lead Intake and Distribution ProtocolPersonally Generated Leads

All personally generated leads must be:

- Emailed to the Lead Manager within **24 hours** of initial contact.
- **OR** input directly into the CRM by the agent within **24 hours** of initial contact.

Centralized Leads

- The Lead Manager will input general leads into the Lead Management System for distribution.
- **After-Hours/Weekend Leads:** Leads received outside of business hours must be input into the **#Appointments Slack Channel** for immediate distribution. The receiving agent is responsible for subsequently inputting these leads into the CRM.

3. Best Practices for New Lead Management

The following protocol must be followed for all new lead assignments until connection is made (up to 14 days):

1. **Claim** new leads immediately.
2. **Call** new leads using the **FUB App**.
3. **Text** new leads using the **FUB App**.
4. **Repeat** the call and text attempts for **14 days** until you connect with the lead. FUB will assign a daily task for this follow-up.
5. **Log Call and Enter Notes** when a conversation occurs.
6. **Change Lead Stage** immediately after a successful connection and logging of notes.

Call Expectation

- Leads must be called by the assigned agent within **24 hours** of lead assignment.
- If a call is not logged within the 24-hour timeframe, the Lead Manager may re-assign the lead.

4. Contact and Lead Stages

The following stages are used in Follow Up Boss (FUB) for lead tracking and follow-up. **Buyer Agents** primarily use *Lead*, *Hot Prospect*, and *Nurture*.

Stage	The SELLING Team's Definition	FUB Definition
LEAD	Lead was received no more than 14 days ago, and you have left messages but have not connected.	New contacts you haven't talked to yet. Newly added contacts automatically start here; after 14 days, they change to **Unresponsive**.
BUYER (Hot Prospect)	Actively showing properties **and** have agency signed.	Buyers who **NEED to move in the next three months**.
BUYER (Nurture)	In communication **and** have agency signed.	Buyer who says they will be moving **more than three months from now**.
BUYER (Watch)	Checking in with.	Buyer who is **more than 6 months out**.
SELLER-Signed	Have their home listed for sale with our team.	Active on the market, in your pipeline.
On Deck Seller	Seller who is not quite ready.	N/A (Internal use, may align with Seller-Signed On Deck in FUB).
Watch 3+ Years	Long term follow up (buyer), more than 3 years out.	Maybe they recently bought with another agent or have no clear timeline.
Unresponsive	N/A	Someone who has stopped responding to you, but you want to continue working with.
Pending	N/A	Someone who has an accepted offer.
Forever Client Closed	Past client of the team.	Past client of the team.
Do Not Contact	N/A	They were next level mean, unethical, or requested not to be contacted.
Trash	**DO NOT USE!**	**DO NOT USE!**

Stage Management

- **Buyer Tagging:** The Director of Operations will tag buyers weekly when agency is signed.
- **Seller Stage Update:** The Listing Manager will update a lead's stage to **Seller-Signed** when a new listing is processed.
- **Evaluation:** The Lead Manager will regularly evaluate stages to ensure compliance and accuracy.

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