Team Expectations – Internet Lead Procedures

Our team is known for our technology, best customer service, and follow-up in New Jersey.

We understand how important it is for our business and reputation to contact all leads assigned to a team member immediately. The team understands the value of every lead that the listing and market departments have generated. Our goal for every lead is to transform that lead into a client for life.

Belief System - Leads are opportunities for the team. Nobody owns a lead or client. If a lead is in a team member's account, that means they have a chance to establish a long-lasting relationship with a client.

It isn't the lead responsibility to remember our name; it is our responsibility to ensure they don't forget it.

Brivity Lead Assignment and Team Expectations

New Lead

1. Once a new lead is assigned, each team member will call **within 5 minutes.**
2. All leads shall have the following logged and accomplished in Brivity immediately.
    a. Stage Change appropriately
    b. Log Call
    c. Send Welcome/Intro/Appointment Confirmation Email and log email.
    d. Set To-Do
    e. Text if no contact
    f. Set Up appropriate action plan if no contact
    g. Set Up appropriate Property Search

3. **To-Dos**: Remind team members to call all leads seven times within seven days. After contact, change client Stage as Hot, Nurture, Watch, Unqualified. If there is no connection after seven attempts, change the Stage to Inactive. All valid emails shall have a long-term e-mail drip and property search setup.
    a. **HINT**: When there is no contact, make calls at different times. Look at the times of day they log in to the website. Set a to-do for that time.
    b. **Hint**: Text message to see if it is a cell phone, or they can take text messages at work.
4. **RULES for Transfer** – A lead can be transferred to another team member by the Team Leader or ISA for the following. Contact means a Quality Conversation took place.
    a. No Action after 24 hours
    b. No Call made or logged after 24 hours
    c. No Email after 24 hours
    d. No Property Search after 24 hours

e. No To-Do entered for Qualify or New Leads within the first 10 days
f. No contact after 24 hours
g. Less than ten calls in 10 days with no contact
h. Cold Lead that hasn't been in contact for over two months
i. Hot with no connection logged and notes
j. Any Unresponsive or Trash
   i. Note: All contacts have to be logged with detailed notes. Simply logging isn't sufficient.

5. **Property Searches**
   a. Check leads search history for the idea of their preferences.
   b. Start Property Search based on area, price range, and type. Set broad search parameters.
   c. Customize e-mail subject based on the lead's name and area—example: Jim's home search. Or Jim's home search in Wenatchee.
   d. Frequency Guidelines:
      i. **LEAD –** Daily
      ii. **HOT –** Daily or Twice a week. Check preference.
      iii. **Nurture** – Weekly.
      iv. **Watch-** Monthly
      v. **Inactive –** Monthly
      vi. **Trash -** Invalid E-mail & Phone Number
      vii. **Pending –** Twice a Month to Monthly
      viii. **Past Client –** Monthly call to check in and give market updates.
   e. **Lead –** Min. 7 Call attempts in the first seven days. E-mail smart drip.
   f. **Hot –** Call daily or twice a week. Email Properties daily.
   g. **Nurture** - 3-12 months. Call weekly.
      i. **Hint:** Send specific properties they may like directly from Brivity
      ii. **Pre-approval –**Make sure our lenders are calling to pre-qualify over the phone
   h. **Watch–** 12+ months. Call once per month. Call on the week of the 8th of each month.
   i. **FAQ: When do I stop calling my Cold Leads once per month?** Answer: Until their situation changes to Nurture or Hot. Leads can be a Cold buyer for years.
   j. **Pending/Closed –** Call pending clients weekly. Closed leads are your SOI Sphere of Influence. Call SOI the week of the 22nd each month. Use FORD script and ask for referrals.
   k. **Inactive & Trash –** Check Inactive & Trash leads once per month during your Cold buyer week. Look for recent activity.
6. **More Information/Showing/Valuation/Sell/Buy Request –** Requests should be double dialed within 5 minutes if no contact, leave a voice message, text, and email through Brivity. If no contact after Call, Text, E-mail set a task for later that day or the next day.

7. **Seller Form Filled Out –** Any seller form request or email about market analysis or selling a lead's home should be transferred immediately to the listing department. Buyer specialists must fill out a Seller Information Sheet with their name.
    a. **Note:** Seller requests are vitally important to the team, and the listing department needs to contact these leads immediately. The buyer specialist must promptly transfer and notify the listing department of the lead rotation.
8. **Trash Leads –** Trash lead only if both the e-mail and number have been confirmed invalid.
9. **Other Team Member's Leads** - If a lead indicates they are working or have contacted a specific team member, transfer lead to their account with notes. A team member should call a team member to brief on a conversation. It is not uncommon for a lead to have multiple accounts or call in on a different website or phone system when they are already in the system. Suppose the lead does not have an agent or a team member to their memory contact team leader. Often, a team member works with the spouse or partner in another account. We avoid conflict at all times within the team over leads. We have an abundance of leads, and those that give get back ten times.
10. **Out of your area -** Know your area of expertise. You must be 100% committed to mastering an area and service within one hour radius. Otherwise, refer to a team member who can. When in doubt, contact the Team Leader.

TEAM MEMBER EXPECTATIONS

We are full-time real estate professionals

We prospect a min. of 1 hour a day

We follow up a min. of 1 hour a day

We utilize the office for office work and support other team members.

We sell a min. of 2 homes a month on average

We return all missed calls by the end of the day

We produce all voice messages by the end of the day

We reply to all emails by the end of the day

We dress business casual or better when on duty, including team meetings

We stay in contact with our clients under contract to close min. 1X a week

We keep in contact with our sellers under listing agreement min. 1X a week

We don't screen or ignore calls

We don't steal clients from team members

Client Care Staff Section

Client Care coordinators are the central command center of our team. Their ability to qualify and assign clients effectively and efficiently is vital to the team's overall success. Client Care's primary focus is to call all new leads within 5 minutes of registration and call until contact. The process can take 200 phone calls and take years. We believe all leads are good leads.

Client Care Expectations

1. Client Care shall maintain a min. of 15 calls an hour. A 4-hour shift shall call 60 leads and an 8-hour shift 120 leads.
2. Client Care must maintain a Daily Activity Record report to the Team Leader at the end of each day or an End of Day Report emailed to the team leader by the work shift.
3. Client Care must report all activities to Team Leader on Friday at 4 PM each week.
4. Client Care must present and report their lead transfers on Thursday morning after the ISA call.
5. Client Care will be evaluated on the number of calls per hour and per day and leads transferred per 8 hours of work
6. Client Care will make a proper introduction on their role within the team as an unlicensed concierge and explain the role of the buyer specialist and listing partner prior to any transfer.
7. Client care that is unlicensed may NOT:
    a. May NOT - show properties, answer questions or interpret information about the property, price or condition.
    b. May NOT – Interpret information about listings, titles, financing, contracts, closing, or other information related to a transaction.
    c. Fill in legal forms or negotiate price or terms.

Call Procedures & Lead Handling

1. Client Care must follow the Internet Lead Procedures.
2. Client Care shall spend 95% of their time on the telephone qualifying and following up with New, Warm, Cold, and Unresponsive leads.
    a. Client Care shall spend 5% assigning leads, setting property alerts and smart drips
3. Client Care shall call all new leads within 5 minutes of registration during work hours.
    a. New leads take priority over ALL work activities
4. Client Care is authorized to call any lead in the database in the event a team member has not met the lead follow up process and expectations outlined in this document. Client Care shall use caution when speaking to a lead that is already working with a team member.

5. Transferring Procedures – Once an appointment has been set client care shall transfer to the next buyer specialist or listing partner on his/her call rotation and complete the following:
    a. Log all pertinent information into Brivity including but not limited to: Log Call, Log Email, Set E-alert, Change Stage, write detailed notes that will notify AGENT and Transfer.
    b. Brief Team Member in person or over the phone on conversation. Emphasis on qualifying information, lead stage, and when team member should contact next.
        i. Assigned Leads should be contacted by team member immediately upon accepting appointment.
    c. Enter Lead Information into Appointment Tracker
    d. Send email to client including team member introducing team member for hand off.
6. Client Care shall follow an even round robin rotation to distribute leads and appointments.
    a. Client Care shall use a call rotation system. The client care department will call a rotation. If no answer, they will continue to the next team member until assignment has been made. Time is of the essence for hand off.
7. Client care shall set expectations with the client on when a team member will be contacting them. HOT leads can expect to be called as soon as possible or at the latest by the end of the day.
8. Client Care will set in house appointments as their first priority. 2nd priority is at the house.
9. Client Care will focus on seller leads and listing appointments a min. of 2 hours a day.
    a. Client care will ask every lead if they have a house to sell. Or if they are using the site to determine their home's value. In the event they do have a house to sell, client care will notify the listing department.
10. Client Care will brief the buyer's agent or listing partner on the stage of lead using the following codes
    a. Hot – Will buy within 3 months
    b. Nurture – Will buy within 12 months
    c. Watch – Will buy in more than 12 months
    d. Price Point in 1,000 increments only use the top of their range.
        i. $300,000 = 300
    e. Single Family, Town Home, Condo
    f. Area = Marlton, Mount Laurel, Medford
    g. Example a buyer looking in Marlton for a single family house around $300,000 that would buy now if they found it.
11. Client care's goal is to increase company production, efficiency, and profit.
12. Client Care will provide team leader an end of day report in Slack at the end of their shift with the min. information.
    a. Number of dials
    b. Number of contacts
    c. Number of appointments
    d. Challenges
    e. Ideas

Team Member Lead Handling Expectations

1. When a new lead is qualified and assigned to a team member the team member must accept the lead transfer with client care by phone with proper briefing. Team member understands the client care uses a call rotation vs. an appointment rotation meaning team member must answer client care's phone call to obtain appointment.
2. Team member shall find the time to get an adequate briefing from Client Care on the lead that is transferred prior to calling lead. Team member understands this briefing is at the utmost importance and shall give the Client Care Coordinator their undivided attention during the briefing.
3. Team members shall review all notes.
4. Team member is responsible to make sure the lead is correctly set up in their lead management system with an accurate Property Search, Smart Drip as necessary and category.
5. Team member shall attempt to call a lead that is transferred at least twice a day for 3 days prior to sending the lead to Unconverted.
6. Team members understand there is no reason a transferred lead should not respond to text, calls and emails. The three most important words in real estate sales are Follow Up, Follow Up and Follow Up. The team member understands their follow up and qualifying skills determines whether or not it is a good lead not the client care coordinators initial contact.
7. Team member will contact HOT transferred leads as soon as possible and no later than the end of business day.
8. Team member understands they may need to attempt to contact a HOT lead more than 4 times in one day to make contact.
9. Team member must contact and make a proper introduction to all leads within 3 days of assignment.
10. Zillow Leads – Team members understand that a Zillow lead is considered a HOT lead until proven otherwise. Therefore the Zillow lead should be contacted immediately for greatest success. It should be assumed the Zillow lead wants to look at property as soon as possible and will be ready to purchase.
11. Team member must make notes upon making contact with appointment and report back results to client care department for tracking and feedback.
12. Team members that do not call HOT leads such as Zillow within 24 hours excluding Sunday may be subject to a 1 week removal from the rotation. The decision can be made by the Team Leader.
13. Team members must be prepared to present the results of all their lead assignments for the previous 30 days and showing appointments, offers made, and activity log results.

Team Member In Bound Phone Calls

1. Team members shall ask all inbound phone calls if they have already contacted one of our team members.
2. Contact made, Team members shall enter the lead into Brivity manually.
3. If the lead is Zillow, that lead auto imports, and the team member must request a transfer from Team Leader.
4. The agent makes the transfer under the condition the conversation was quality and will lead to an eventual appointment or an appointment made.
5. Lead assigned to another team member Team Leader will make their best judgment on whom to trust.