Marchese Real Estate Referral Out Process Step by Step

1) Lead says they want to move somewhere outside of our service area - thus we need to refer it out and complete our google form. Ask the lead the following:

- Full contact info - phone number, email address
- Are they a first-time homebuyer?
- Do they need to sell? Before or after they move?
- Do they rent or own currently? When does the lease expire?
- Reason for moving.
- Where are they at in the financing process?
- Price range?
- Area? Do they have specific areas?

2) Agent contacts (Brivity task OR text/chat message depending on urgency) Go to Brivity Search and select Partners then select a Partner in that area. Put all notes in Brivity, including the specific area the lead is looking for. Follow up with the Leadership Team to make sure referral was received.

3) Agent calls (leave voicemail and send text to call you back) referral agent and introduces themselves, the client, and what the client is looking for. Agent lets the referral agent know that they will be receiving a referral agreement with the lead's contact info. Do not share contact info for the lead at this time. **Discuss with the referral agent what the referral commission percentage will be. Standard is 25%.**

4) Agent adds contact info of the referral agent into Brivity (name, phone number, email address, company name and address. Under details description state if they are a buyer or seller and commission percentage. Add Relationship of agent (referrer) and lead (referral) - Done by the Leadership Team

5) Administration applies Auto Plan: Outbound Referral

6) Ops and agents follow tasks assigned to them. Ops will send out the referral agreement.

7) Referral agent receives referral form, signs, and sends it to admin@marcheseteam.com.

8) Administrator uploads the referral form in Brivity then lets the agent know the referral agent is working with the lead.

10) When the transaction closes, Ops makes sure a referral check is sent to the referring agent.