Sierra Lead Flow Manual

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Foreword

The Sierra Lead Flow Manual was created to supplement the user's understanding of the Hatch Lead Flow System (Hatch System) within the Sierra CRM. To implement fully, please watch the Hatch Systems training videos to gain a better understanding of the Hatch Lead Flow System.

This manual explains the intricacies of the Hatch Lead Flow System. There are five types of leads discussed in the manual: New Leads, Uncontacted Leads, Follow Up Leads, Failed Follow Up Leads, and Not Interested Leads. Each section is broken down into the particular outcomes that correlate with each type of lead. These outcome sections outline the actions needed to properly implement the Hatch System.
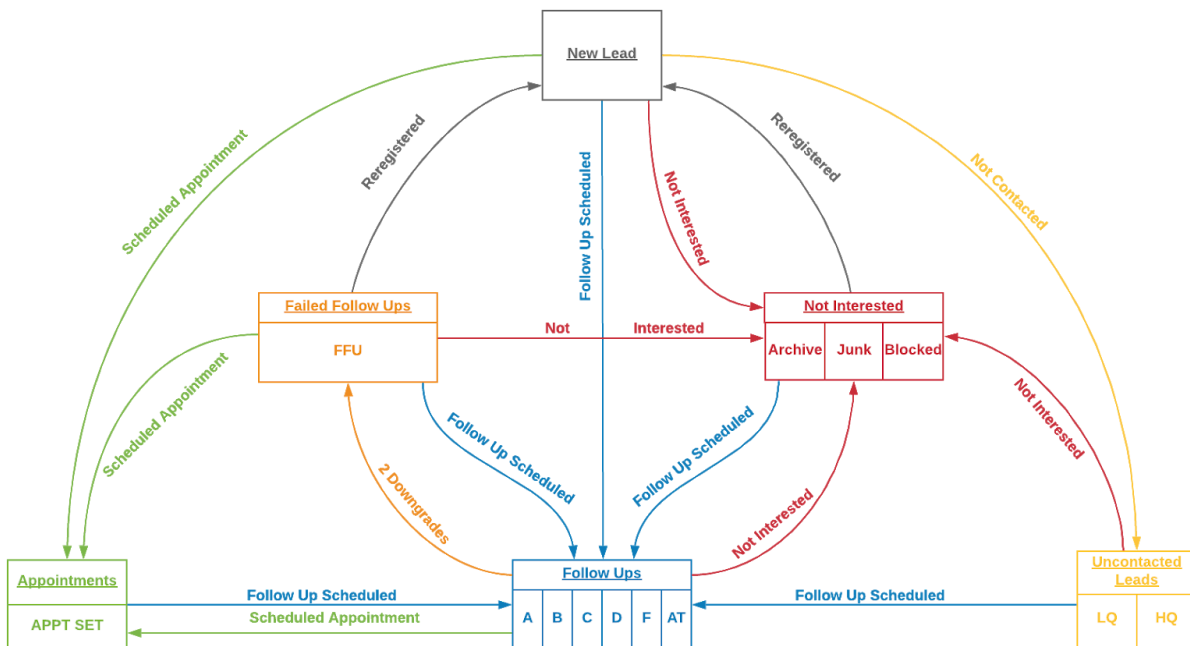
New Leads

Call the new lead within five minutes if they register between 8:30am and 8:30pm. If they register after 8:30pm, call the next morning at 8:30am.

Four Possible Outcomes:
UNCONTACTED- These leads were attempted but went uncontacted.

NOT INTERESTED- These leads were contacted, indicated that they weren't interested, and are deemed unworthy to chase.

FOLLOW UP SCHEDULED- These leads were contacted and should be actively chased at a later date.

SCHEDULED APPOINTMENT- These leads were contacted and converted into an appointment.
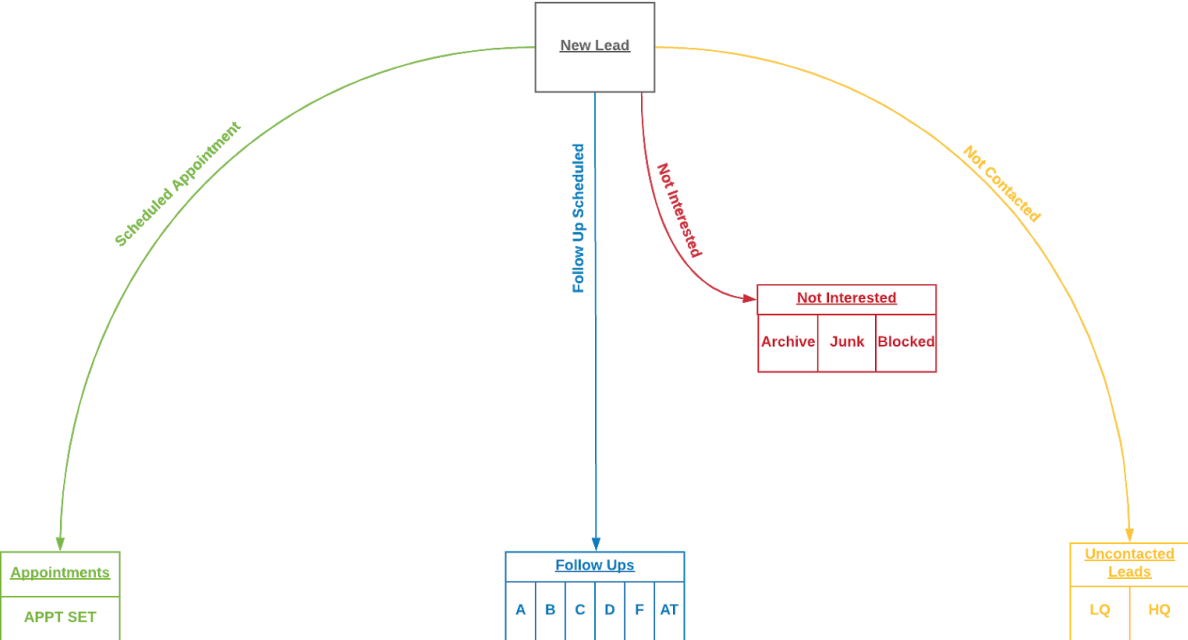
New Leads

OUTCOME: UNCONTACTED

These leads were attempted but went uncontacted.

Two Types:

High Quality- Leads that have a desire to learn more about a specific property.
Examples: Property Inquiry Leads/ CMA Requests/Etc

Low Quality- Leads that have a general curiosity about real estate.
Examples: Forced Registration Leads/ Home Evaluation Leads/Etc

If High Quality (HQ), then follow the steps below:

1) Leave a voicemail.
2) Reassign the lead to yourself.
3) Move the lead to Qualify status.
4) Apply the HQ tag.
5) If the lead has not explicitly opted in to receiving text messages, disable texting features.
6) Apply the automatic buyer/seller campaign with an immediate start date.

If Low Quality (LQ), then follow the steps below:

1) Don't leave a voicemail.
2) Reassign the lead to yourself.
3) Move the lead to Qualify status.
4) Apply the LQ tag.
5) If the lead has not explicitly opted in to receiving text messages, disable texting features.
6) Apply the automatic buyer/seller campaign with an immediate start date.

New Leads

OUTCOME: NOT INTERESTED

These leads were contacted, indicated that they weren't interested, and are deemed unworthy to chase.

Three Types:
Archive- Leads that aren't currently interested but should receive periodic automatic follow ups. We would re-engage these leads if they reregistered.

Junk- Leads that lack motivation, and shouldn't receive any form of automatic follow ups. We would re-engage these leads only if they reregistered.

Blocked- Leads that we would never want to call again, even if they reregistered.

If Archive, then follow the steps below:
1) Reassign the lead to yourself.
2) Move the lead to Archive status.
3) If the lead has not explicitly opted in to receiving text messages, disable texting features.
4) Apply the automatic Not Interested campaign with an immediate start date.

If Junk, then follow the steps below:
1) Reassign the lead to yourself.
2) Move the lead to Junk status.
3) If the lead has not explicitly opted in to receiving text messages, disable texting features.

If Blocked, then follow the steps below:
1) Reassign the lead to yourself.
2) Move the lead to Blocked status.
3) If the lead has not explicitly opted in to receiving text messages, disable texting features.

New Leads

OUTCOME: SCHEDULED FOLLOW UP
These leads were contacted and should be actively chased at a later date.

Five Types:
A Follow Ups- These are the highest quality follow ups, that typically convert into an appointment within 0-30 days.

B Follow Ups- These are moderate quality follow ups, that you've chosen to chase manually, that typically convert into appointments within 30-90 days.

C Follow Ups- These are mediocre quality follow ups, that you've chosen to chase manually, that typically convert into appointments within 90-180 days.

D Follow Ups- These are the lowest quality follow ups, that you've chosen to chase manually, that typically convert into appointments after 180 days have past.

F Follow Ups- These are follow ups that you've chosen to chase automatically, that convert at a variety of times.

If A Follow Ups (A), then follow the steps below:
1) Reassign the lead to yourself.
2) Move the lead to Qualify status.
3) If the lead has not explicitly opted in to receiving text messages, disable texting features.
4) Apply the A Follow Up tag.
5) Apply the traditional A Follow Up campaign, with the start date being your designated follow up date.
6) Apply the automatic Nurture Messaging campaign with an immediate start date. (optional)

If B Follow Ups (B), then follow the steps below:
1) Reassign the lead to yourself.
2) Move the lead to Qualify status.
3) If the lead has not explicitly opted in to receiving text messages, disable texting features.
4) Apply the B Follow Up tag.
5) Apply the traditional B Follow Up campaign, with the start date being your designated follow up date.
6) Apply the automatic Nurture Messaging campaign with an immediate start date. (optional)

If C Follow Ups (C), then follow the steps below:

1) Reassign the lead to yourself.
2) Move the lead to Qualify status.
3) If the lead has not explicitly opted in to receiving text messages, disable texting features.
4) Apply the C Follow Up tag.
5) Apply the traditional C Follow Up campaign, with the start date being your designated follow up date.
6) Apply the automatic Nurture Messaging campaign with an immediate start date. (optional)

If D Follow Ups (D), then follow the steps below:

1) Reassign the lead to yourself.
2) Move the lead to Qualify status.
3) If the lead has not explicitly opted in to receiving text messages, disable texting features.
4) Apply the D Follow Up tag.
5) Apply the traditional D Follow Up campaign, with the start date being your designated follow up date.
6) Apply the automatic Nurture Messaging campaign with an immediate start date. (optional)

If F Follow Ups (F), then follow the steps below:

1) Reassign the lead to yourself.
2) Move the lead to Qualify status.
3) If the lead has not explicitly opted in to receiving text messages, disable texting features.
4) Apply the F Follow Up tag.
5) Apply the appropriate fully automated follow up campaign, with an immediate start date.

New Leads

OUTCOME: SCHEDULED APPOINTMENT
These leads were contacted and converted into an appointment.

One Type:
Scheduled Appointment- Leads that have been contacted and booked for an appointment.

If Scheduled Appointment (APPT), then follow the steps below:
1) Reassign the lead to yourself.
2) Move the lead to Active status.
3) If the lead has not explicitly opted in to receiving text messages, disable texting features.
4) Apply the APPT Set tag.

Uncontacted Leads

These leads are separated into two pools, Low Quality (LQ) and High Quality (HQ). Uncontacted leads should ideally be called 2x per business day. Many of them will also be receiving automated messages through the system.

Five Possible Outcomes:
REMAIN UNCONTACTED- These leads were attempted but went uncontacted.

ACTIVE TEXT- These leads were contacted and responded to an automatic text message.

NOT INTERESTED- These leads were contacted, indicated that they weren't interested, and are deemed unworthy to chase.

FOLLOW UP SCHEDULED- These leads were contacted and should be actively chased at a later date.

SCHEDULED APPOINTMENT- These leads were contacted and converted into an appointment.
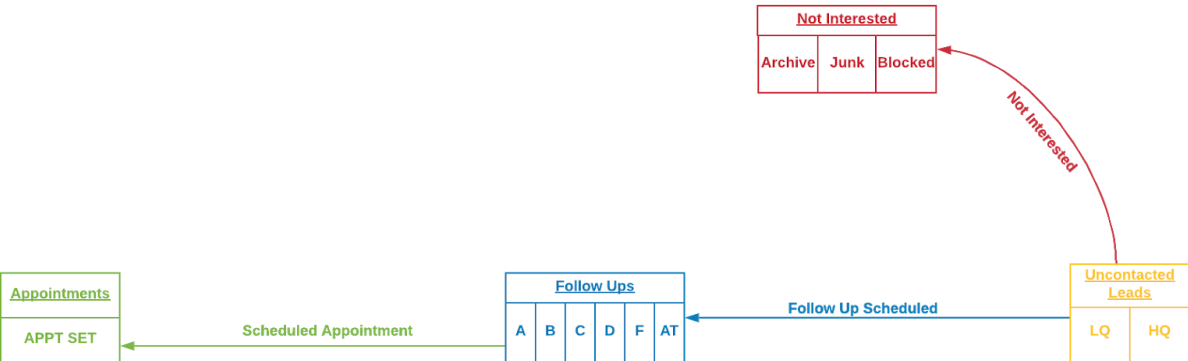
Uncontacted Leads

OUTCOME: REMAIN UNCONTACTED
These leads were attempted but went uncontacted.

Two Types:
High Quality- Leads that have a desire to learn more about a specific property.
Examples: Property Inquiry Leads/ CMA Requests/Etc

Low Quality- Leads that have a general curiosity about real estate.
Examples: Forced Registration Leads/ Home Evaluation Leads/Etc

If High Quality (HQ), then follow the steps below:
1) Leave on HQ tag.
2) Call this list at least twice per business day.

If Low Quality (LQ), then follow the steps below:
1) Leave on LQ tag.
2) Call through this list at least once per business day (if possible).

Uncontacted Leads

OUTCOME: ACTIVE TEXT

These leads were contacted and responded to an automatic text message.

One Type:
Active Text- Leads that have responded to an automatic text, and engaged us in an active text conversation.

If Active Text (AT), then follow the steps below:
1) Reassign the lead to yourself.
2) Apply AT tag.
3) Apply the traditional Active Text campaign with an immediate start date.
4) Remove the LQ or HQ tag.

Uncontacted Leads

OUTCOME: NOT INTERESTED

These leads were contacted, indicated that they weren't interested, and are deemed unworthy to chase.

Three Types:

Archive- Leads that aren't currently interested but should receive periodic automatic follow ups. We would re-engage these leads if they reregistered.

Junk- Leads that lack motivation, and shouldn't receive any form of automatic follow ups. We would only re-engage these leads if they reregistered.

Blocked- Leads that we would never want to call again, even if they reregistered.

If Archive, then follow the steps below:

1) Reassign the lead to yourself.
2) Move the lead to Archive status.
3) Remove the LQ or HQ tag.
4) Apply the automatic Not Interested campaign with an immediate start date.

If Junk, then follow the steps below:

1) Reassign the lead to yourself.
2) Move the lead to Junk status.
3) Remove the LQ or HQ tag.

If Blocked, then follow the steps below:

1) Reassign the lead to yourself.
2) Move the lead to Blocked status.
3) Remove the LQ or HQ tag.

Uncontacted Leads

OUTCOME: SCHEDULED FOLLOW UP
These leads were contacted and should be actively chased at a later date.

Five Types:
A Follow Ups- These are the highest quality follow ups, that typically convert into an appointment within 0-30 days.

B Follow Ups- These are moderate quality follow ups, that you've chosen to chase manually, that typically convert into appointments within 30-90 days.

C Follow Ups- These are mediocre quality follow ups, that you've chosen to chase manually, that typically convert into appointments within 90-180 days.

D Follow Ups- These are the lowest quality follow ups, that you've chosen to chase manually, that typically convert into appointments after 180 days have past.

F Follow Ups- These are follow ups that you've chosen to chase automatically, that convert at a variety of times.

If A Follow Ups (A), then follow the steps below:
1) Reassign the lead to yourself.
2) Move the lead to Qualify status.
3) If the lead has not explicitly opted in to receiving text messages, disable texting features.
4) Apply the A Follow Up tag.
5) Apply the traditional A Follow Up campaign, with the start date being your designated follow up date.
6) Apply the automatic Nurture Messaging campaign with an immediate start date. (optional)

If B Follow Ups (B), then follow the steps below:
1) Reassign the lead to yourself.
2) Move the lead to Qualify status.
3) If the lead has not explicitly opted in to receiving text messages, disable texting features.
4) Apply the B Follow Up tag.
5) Apply the traditional B Follow Up campaign, with the start date being your designated follow up date.
6) Apply the automatic Nurture Messaging campaign with an immediate start date. (optional)

If C Follow Ups (C), then follow the steps below:

1) Reassign the lead to yourself.
2) Move the lead to Qualify status.
3) If the lead has not explicitly opted in to receiving text messages, disable texting features.
4) Apply the C Follow Up tag.
5) Apply the traditional C Follow Up campaign, with the start date being your designated follow up date.
6) Apply the automatic Nurture Messaging campaign with an immediate start date. (optional)

If D Follow Ups (D), then follow the steps below:

1) Reassign the lead to yourself.
2) Move the lead to Qualify status.
3) If the lead has not explicitly opted in to receiving text messages, disable texting features.
4) Apply the D Follow Up tag.
5) Apply the traditional D Follow Up campaign, with the start date being your designated follow up date.
6) Apply the automatic Nurture Messaging campaign with an immediate start date. (optional)

If F Follow Ups (F), then follow the steps below:

1) Reassign the lead to yourself.
2) Move the lead to Qualify status.
3) If the lead has not explicitly opted in to receiving text messages, disable texting features.
4) Apply the F Follow Up tag.
5) Apply the appropriate fully automated follow up campaign, with an immediate start date.

Uncontacted Leads

OUTCOME: SCHEDULED APPOINTMENT
These leads were contacted and converted into an appointment.

One Type:
Scheduled Appointment- Leads that have been contacted and booked for an appointment.

If Scheduled Appointment (APPT), then follow the steps below:
1) Reassign the lead to yourself.
2) Move the lead to Active status.
3) Apply the APPT Set tag.
4) Remove the LQ or HQ tag.

Follow Up Leads

These leads are separated into four pools: A, B, C, D, F and AT.
Follow ups should only be called when prompted by a follow task, or if they respond to an automated attempt. Everytime you call, and the lead doesn't answer, you should leave a personalized voicemail, send a personalized text, and a personalized email. The first follow up call for manual follow ups (ABCDs) is always based on a subjective date chosen by the lead generator. The subsequent follow up call cadence depends on whether the lead is classified as an A, B, C or D lead.

Four Possible Outcomes:
REMAIN FOLLOW UP- These leads were attempted but went uncontacted.

ACTIVE TEXT- These leads were contacted and responded to an automatic text message.

DOWNGRADE- These leads were attempted, didn't get contacted, and now need to be downgraded.

NOT INTERESTED- These leads were contacted, indicated that they weren't interested, and are deemed unworthy to chase.

SCHEDULED APPOINTMENT- These leads were contacted and converted into an appointment.
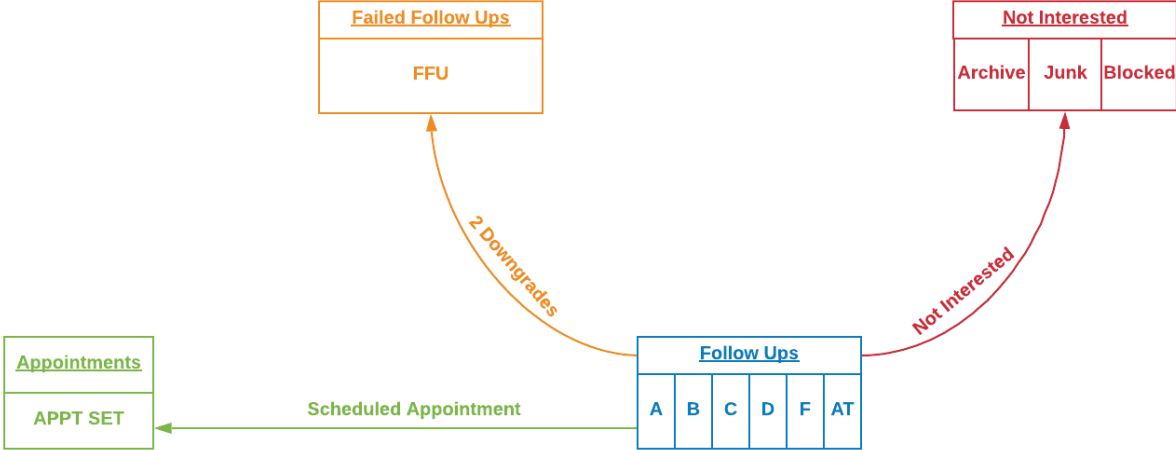
Follow Up Leads

OUTCOME: REMAIN FOLLOW UP
These leads were attempted, but did not get contacted.

Five Types:
A Follow Ups- These are the highest quality follow ups that typically convert into an appointment within 0-30 days. In the case of an unsuccessful call attempt, the follow up cadence is one call every three days. These follow up tasks should be completed every single day of the year (aka they should never become past due).

B Follow Ups- These are moderate quality follow ups that typically convert into appointments within 30-90 days. In the case of an unsuccessful call attempt, the follow up cadence is one call once a week. These follow up tasks should be completed every work day of the year (aka, they should only become past due if they land on a weekend day).

C Follow Ups- These are mediocre quality follow ups that typically convert into appointments within 90-180 days. In the case of an unsuccessful call attempt, the follow up cadence is one call per month. These follow up tasks should be completed by every other work day (aka, they should only become past due up to one day).

D Follow Ups- These are the lowest quality follow ups that typically convert into appointments past 180+ days. In the case of an unsuccessful call attempt, the follow up cadence is one call bimonthly. These follow up tasks should be completed every work week (aka, they should only become past due up to seven days).

If you have any of the ABCD follow ups, then follow the steps below:
1) Complete any tasks within the crm.

F Follow Ups- These are follow ups that you've chosen to chase automatically, that convert at a variety of times. You will only need to actively chase these leads if they respond to one of the fully automated follow up campaigns. If they do respond, it may be worth adding to the AT tag to ensure the lead does not slip through the cracks.

Follow Up Leads

OUTCOME: ACTIVE TEXT

These leads were contacted and responded to an automatic text message.

One Type:
Active Text- Leads that have responded to an automatic text, and engaged us in an active text conversation.

If Active Text (AT), then follow the steps below:
1) Apply AT tag.
2) Apply the traditional Active Text campaign with an immediate start date.

Follow Up Leads

OUTCOME: DOWNGRADE

These leads were attempted, didn't get contacted, and now need to be downgraded.

Two Types:
First Downgrade- These leads have been downgraded once.
Second Downgrade- These leads have been downgraded twice consecutively.

If First Downgrade, then follow the steps below:
1) Move the follow up tag from A to B, or B to C, or C to D.
2) Apply the new traditional B, C,or D Follow Up campaign with an immediate start date.

If Second Downgrade, then follow the steps below:
1) Remove the B, C, or D tag.
2) Apply the Failed Follow Up Tag.
3) Apply the automatic Failed Follow Up campaign with an immediate start date.

Follow Up Leads

OUTCOME: NOT INTERESTED

These leads were contacted, indicated that they weren't interested, and are deemed unworthy to chase.

Three Types:

Archive- Leads that aren't currently interested but should receive periodic automatic follow ups. We would re-engage these leads if they reregistered.

Junk- Leads that lack motivation, and shouldn't receive any form of automatic follow ups. We would only re-engage these leads if they reregistered.

Blocked- Leads that we would never want to call again, even if they reregistered.

If Archive, then follow the steps below:

1) Move the lead to Archive status.
2) Apply the automatic Not Interested campaign with an immediate start date.
3) Remove the A, B, C, D, or AT Follow Up Tag.

If Junk, then follow the steps below:

1) Move the lead to Junk status.
2) Remove the A, B, C, D, or AT Follow Up Tag.

If Blocked, then follow the steps below:

1) Move the lead to Blocked status.
2) Remove the A, B, C, D, or AT Follow Up Tag.

Follow Up Leads

OUTCOME: SCHEDULED APPOINTMENT
These leads were contacted and converted into an appointment.

One Type:
Scheduled Appointment- Leads that have been contacted and booked for an appointment.

If Scheduled Appointment (APPT), then follow the steps below:
1) Move the lead to Active status.
2) Apply the Scheduled Appointment tag.
3)) Remove the A, B, C, D, or AT Follow Up Tag.

Failed Follow Up Leads

These leads are old follow up leads that we failed to re-engage.
Failed follow up leads should be called when possible. Many of them will also be receiving automated messages through the system.
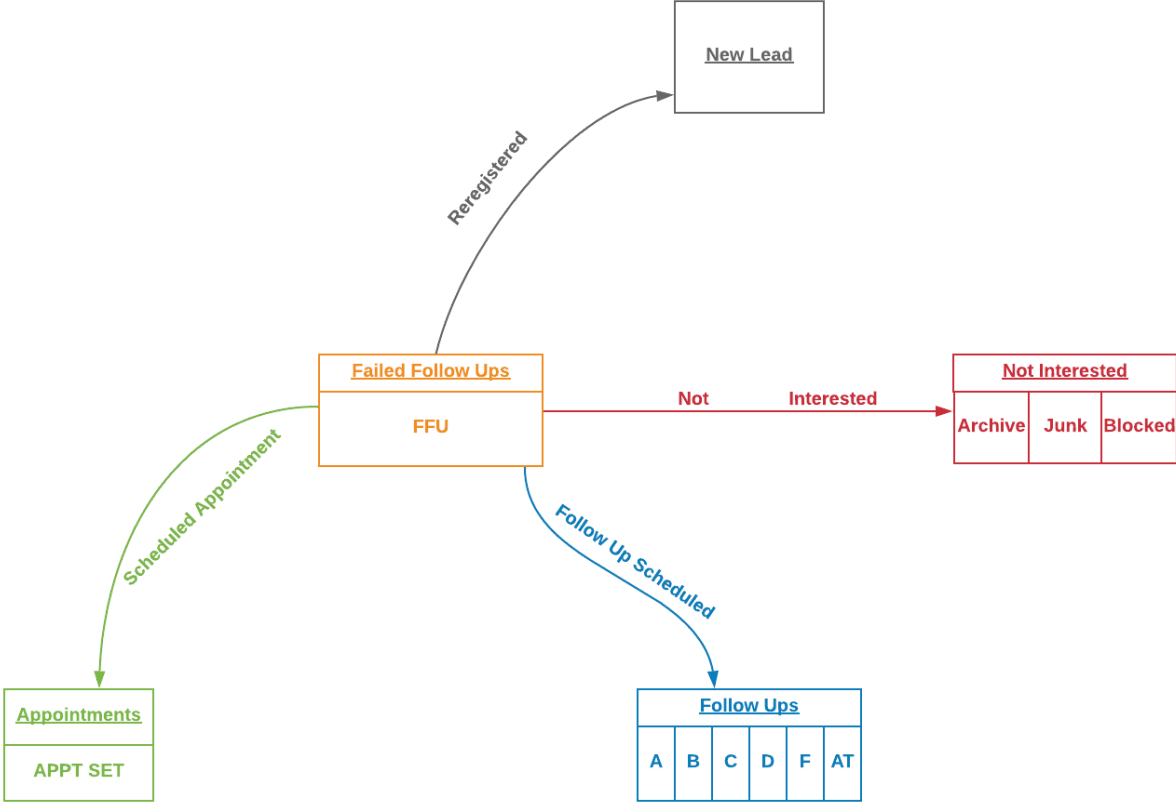
Five Possible Outcomes:
REMAIN FAILED FOLLOW UP- These leads were attempted but went uncontacted.

ACTIVE TEXT- These leads were contacted and responded to an automatic text message.

NOT INTERESTED- These leads were contacted, indicated that they weren't interested, and are deemed unworthy to chase.

FOLLOW UP SCHEDULED- These leads were contacted and should be actively chased at a later date.

SCHEDULED APPOINTMENT- These leads were contacted and converted into an appointment.

Failed Follow Up Leads

OUTCOME: REMAIN FAILED FOLLOW UP
These leads were attempted, but did not get contacted.

One Type:
Failed Follow Up- Leads that we failed to re-engage.

If Failed Follow Up (FFU), follow the steps below:
1) Leave on FFU tag.

Failed Follow Up Leads

OUTCOME: ACTIVE TEXT

These leads were contacted and responded to an automatic text message.

One Type:
Active Text- Leads that have responded to an automatic text, and engaged us in an active text conversation.

If Active Text (AT), then follow the steps below:
1) Reassign the lead to yourself.
2) Apply AT tag.
2) Apply the traditional Active Text campaign with an immediate start date.
3) Remove the FFU tag.

Failed Follow Up Leads

OUTCOME: NOT INTERESTED

These leads were contacted, indicated that they weren't interested, and are deemed unworthy to chase.

Three Types:

Archive- Leads that aren't currently interested but should receive periodic automatic follow ups. We would re-engage these leads if they re-registered.

Junk- Leads that lack motivation, and shouldn't receive any form of automatic follow ups. We would only re-engage these leads if they re-registered.

Blocked- Leads that we would never want to call again, even if they re-registered.

If Archive, then follow the steps below:

1) Reassign the lead to yourself.
2) Move the lead to Archive status.
3) Remove the FFU tag.
4) Apply the automatic Not Interested campaign with an immediate start date.

If Junk, then follow the steps below:

1) Reassign the lead to yourself.
2) Move the lead to Junk status.
3) Remove the FFU tag.

If Blocked, then follow the steps below:

1) Reassign the lead to yourself.
2) Move the lead to Blocked status.
3) Remove the FFU tag.

Failed Follow Up Leads

OUTCOME: SCHEDULED FOLLOW UP
These leads were contacted and should be actively chased at a later date.

Five Types:
A Follow Ups- These are the highest quality follow ups, that typically convert into an appointment within 0-30 days.

B Follow Ups- These are moderate quality follow ups, that you've chosen to chase manually, that typically convert into appointments within 30-90 days.

C Follow Ups- These are mediocre quality follow ups, that you've chosen to chase manually, that typically convert into appointments within 90-180 days.

D Follow Ups- These are the lowest quality follow ups, that you've chosen to chase manually, that typically convert into appointments after 180 days have past.

F Follow Ups- These are follow ups that you've chosen to chase automatically, that convert at a variety of times.

If A Follow Ups (A), then follow the steps below:
1) Reassign the lead to yourself.
2) Move the lead to Qualify status.
3) If the lead has not explicitly opted in to receiving text messages, disable texting features.
4) Apply the A Follow Up tag.
5) Apply the traditional A Follow Up campaign, with the start date being your designated follow up date.
6) Apply the automatic Nurture Messaging campaign with an immediate start date. (optional)

If B Follow Ups (B), then follow the steps below:
1) Reassign the lead to yourself.
2) Move the lead to Qualify status.
3) If the lead has not explicitly opted in to receiving text messages, disable texting features.
4) Apply the B Follow Up tag.
5) Apply the traditional B Follow Up campaign, with the start date being your designated follow up date.
6) Apply the automatic Nurture Messaging campaign with an immediate start date. (optional)

If C Follow Ups (C), then follow the steps below:

1) Reassign the lead to yourself.
2) Move the lead to Qualify status.
3) If the lead has not explicitly opted in to receiving text messages, disable texting features.
4) Apply the C Follow Up tag.
5) Apply the traditional C Follow Up campaign, with the start date being your designated follow up date.
6) Apply the automatic Nurture Messaging campaign with an immediate start date. (optional)

If D Follow Ups (D), then follow the steps below:
1) Reassign the lead to yourself.
2) Move the lead to Qualify status.
3) If the lead has not explicitly opted in to receiving text messages, disable texting features.
4) Apply the D Follow Up tag.
5) Apply the traditional D Follow Up campaign, with the start date being your designated follow up date.
6) Apply the automatic Nurture Messaging campaign with an immediate start date. (optional)

If F Follow Ups (F), then follow the steps below:
1) Reassign the lead to yourself.
2) Move the lead to Qualify status.
3) If the lead has not explicitly opted in to receiving text messages, disable texting features.
4) Apply the F Follow Up tag.
5) Apply the appropriate fully automated follow up campaign, with an immediate start date.

Failed Follow Up Leads

OUTCOME: SCHEDULED APPOINTMENT

These leads were contacted and converted into an appointment.

One Type:

Scheduled Appointment- Leads that have been contacted and booked for an appointment.

If Scheduled Appointment (APPT), then follow the steps below:

1) Reassign the lead to yourself.
2) Move the lead to Active status.
3) Apply the APPT Set tag.
4) Remove the FFU tag.

Not Interested Leads

We do not actively call any of these leads. We only re-engage them if they respond to an automatic messaging campaign or re-register.
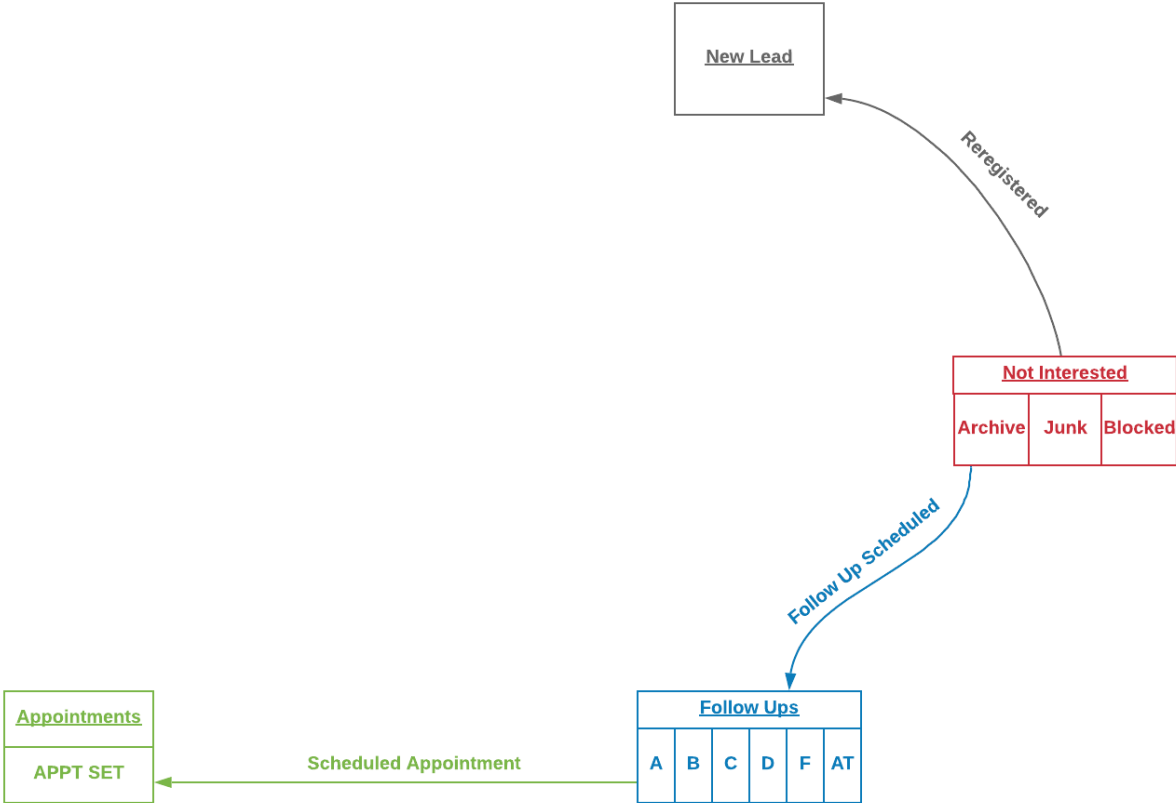
Five Possible Outcomes:
RE-REGISTERED- These leads reregistered on a website, were called like a new lead, but went uncontacted.

ACTIVE TEXT- These leads were contacted and responded to an automatic text message.

NOT INTERESTED- These leads were contacted, indicated that they weren't interested, and are deemed unworthy to chase.

FOLLOW UP SCHEDULED- These leads were contacted and should be actively chased at a later date.

SCHEDULED APPOINTMENT- These leads were contacted and converted into an appointment.

Not Interested Leads

OUTCOME: REREGISTERED

These leads reregistered on a website, were called like a new lead, but went uncontacted.

Two Types:
High Quality- Leads that have a desire to learn more about a specific property.
Examples: Property Inquiry Leads/ CMA Requests/Etc

Low Quality- Leads that have a general curiosity about real estate.
Examples: Forced Registration Leads/ Home Evaluation Leads/Etc

If High Quality (HQ), then follow the steps below:
1) Leave a voicemail.
2) Move the lead to Qualify status.
3) Apply the HQ tag.
4) Apply the automatic buyer/seller campaign with an immediate start date.

If Low Quality (LQ), then follow the steps below:
1) Don't leave a voicemail.
2) Move the lead to Qualify status.
3) Apply the LQ tag.
4) Apply the automatic buyer/seller campaign with an immediate start date.

Not Interested Leads

OUTCOME: ACTIVE TEXT

These leads were contacted and responded to an automatic text message.

One Type:

Active Text- Leads that have responded to an automatic text, and engaged us in an active text conversation.

If Active Text (AT), then follow the steps below:

1) Move the lead to qualify status.
2) Apply AT tag.
3) Apply the traditional Active Text campaign with an immediate start date.

Not Interested Leads

OUTCOME: NOT INTERESTED

These leads were contacted, indicating that they weren't interested and therefore deemed unworthy to chase.

Junk- Leads that lack motivation, and shouldn't receive any form of automatic follow ups. We would only re-engage these leads if they reregistered.

Blocked- Leads that we would never want to call again, even if they reregistered.

If Junk, then follow the steps below:
1) Move the lead to Junk status.

If Blocked, then follow the steps below:
1) Move the lead to Blocked status.

Not Interested Leads

OUTCOME: SCHEDULED FOLLOW UP

These leads were contacted and should be actively chased at a later date.

Five Types:

A Follow Ups- These are the highest quality follow ups, that typically convert into an appointment within 0-30 days.

B Follow Ups- These are moderate quality follow ups, that you've chosen to chase manually, that typically convert into appointments within 30-90 days.

C Follow Ups- These are mediocre quality follow ups, that you've chosen to chase manually, that typically convert into appointments within 90-180 days.

D Follow Ups- These are the lowest quality follow ups, that you've chosen to chase manually, that typically convert into appointments after 180 days have past.

F Follow Ups- These are follow ups that you've chosen to chase automatically, that convert at a variety of times.

If A Follow Ups (A), then follow the steps below:
1) Reassign the lead to yourself.
2) Move the lead to Qualify status.
3) If the lead has not explicitly opted in to receiving text messages, disable texting features.
4) Apply the A Follow Up tag.
5) Apply the traditional A Follow Up campaign, with the start date being your designated follow up date.
6) Apply the automatic Nurture Messaging campaign with an immediate start date. (optional)

If B Follow Ups (B), then follow the steps below:
1) Reassign the lead to yourself.
2) Move the lead to Qualify status.
3) If the lead has not explicitly opted in to receiving text messages, disable texting features.
4) Apply the B Follow Up tag.
5) Apply the traditional B Follow Up campaign, with the start date being your designated follow up date.
6) Apply the automatic Nurture Messaging campaign with an immediate start date. (optional)

If C Follow Ups (C), then follow the steps below:
1) Reassign the lead to yourself.
2) Move the lead to Qualify status.
3) If the lead has not explicitly opted in to receiving text messages, disable texting features.
4) Apply the C Follow Up tag.
5) Apply the traditional C Follow Up campaign, with the start date being your designated follow up date.
6) Apply the automatic Nurture Messaging campaign with an immediate start date. (optional)

If D Follow Ups (D), then follow the steps below:
1) Reassign the lead to yourself.
2) Move the lead to Qualify status.
3) If the lead has not explicitly opted in to receiving text messages, disable texting features.
4) Apply the D Follow Up tag.
5) Apply the traditional D Follow Up campaign, with the start date being your designated follow up date.
6) Apply the automatic Nurture Messaging campaign with an immediate start date. (optional)

If F Follow Ups (F), then follow the steps below:
1) Reassign the lead to yourself.
2) Move the lead to Qualify status.
3) If the lead has not explicitly opted in to receiving text messages, disable texting features.
4) Apply the F Follow Up tag.
5) Apply the appropriate fully automated follow up campaign, with an immediate start date.

Not Interested Leads

OUTCOME: SCHEDULED APPOINTMENT

These leads were contacted and converted into an appointment.

One Type:

Scheduled Appointment- Leads that have been contacted and booked for an appointment.

If Scheduled Appointment (APPT), then follow the steps below:

1) Move the lead to Active status.

2) Apply the APPT Set tag.

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Definitions

Tags

Low Quality Lead (LQ)- Leads that were only generally interested in real estate. This is based on lead source and behavior. Examples: Forced Registration Leads and Home Evaluation Leads. These people are tagged as LQ.

High Quality Lead (HQ)- Leads that were specifically curious in real estate, or committed to working with us. This is based on lead source and behavior. Examples: Property Inquiry Leads, CMA Requests, Expireds, Sign Calls, Come List Me Leads, Come Buy Me Leads. These people tagged as HQ.

A Follow Up (A)- High quality follow up opportunities. Expected to be active within 30 days.

B Follow Up (B)- Moderate quality follow up opportunities. Expected to be active within 31-90 days.

C Follow Up (C)- Mediocre Tier quality follow up opportunities. Expected to be active within 91 to 180 days.

D Follow Up (D)- Low quality follow up opportunities. Expected to be active within 180+ days.

F Follow Ups- These are follow ups that you've chosen to chase automatically with a fully automated follow up campaign, that convert at a variety of times.

Active Text (AT)- Leads we are actively texting, but haven't identified as an A,B,C or D Lead.

Failed Follow Up (FFU)- Leads that we were actively chasing that were downgraded.

Scheduled Appointments (APPT)- Leads that have been converted into an appointment.

Statuses

New- Leads that recently registered and haven't been attempted.

Qualify- Leads that we are actively chasing and attempting to turn into an appointment.

Active- Leads that have been turned into an appointment.

Prime- Leads that have committed to working with you.

Pending- Leads who have pended a home sale/purchase.

Archived- Leads that were not interested, but may be long term opportunities. These leads will receive automated messages.

Watch- Random Leads

Closed- Leads that closed on their home sale/purchase.

Junk- Leads that were not interested, but we would rechase if they reregistered.

Do Not Contact- Leads that are on the Do Not Contact list.

Blocked- Leads that we will never ever chase again.

General Definitions
Opted In- When the lead "signed-up" they did so through a website that explicitly provided consent to text them.