Better Homes and Gardens Real Estate | STAR HOMES

Follow Up Boss Agent Handbook

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Follow Up Boss is a great system for automating some follow up and reminders to you as an agent to stay in touch. However, you should always call or appropriately reach out to new leads. The drips and action plans in Follow Up Boss are designed to engage, but nothing replaces a real attempt at contact by a knowledgeable agent.

The main components of Follow Up Boss you will use are:
Stages, Notes/call logs, Tasks, Tags, Smartlists, Deals, and Action Plans/Drips

AMPLIFIED SOLUTIONS

STAGES

- **Lead*** - All new people coming into FUB - designed only for new inquiries that you haven't connected with. It is very important that you make it a focus to get all inquiries OUT of the lead stage.
- **Attempted Contact***- A lead you're working to contact through phone calls, text, and email.
- **Spoke with Customer***- A customer you're speaking with but haven't had a chance to meet. **Once spoken with, a Hot, Warm, or Cold tag should be applied*
- **Appointment Set***- An appointment has been scheduled with the buyer or seller to meet in person or virtually.
- **Met with Customer***- A customer that you've met either in-person or virtually for a first appointment or tour.
- **Showing Homes***- A customer you're helping tour listings in-person or virtually over multiple appointments.
- **Listing Agreement***- A listing agreement is in place for you to list the home of your seller.
- **Active Listing*** - A client that has their home on the market and available for showings.
- **Submitting offers***- A written offer has been submitted on a property for your client.
- **Under Contract***- Offer accepted! For Flex and ZO referral leads, this status helps us know to reach out to help you with payment steps.
- **Closed*** - The client has recently closed and will go on a Post Closing Action Plan
- **Nurture** *- People with an unknown time frame or not ready yet (this is always a good fallback Stage if you're not sure where to put someone).
- **Contact** - A person who is unlikely to go through the sales process with you, but you still want to have their information in your database (sphere, vendors, lenders, lawyers, outside agents)
- **Trash*** - a person who will never become business or send you business (ex. spam/solicitation, Mass email newsletter, or similar) - Please ONLY trash a lead if it is a solicitation or spam or mass email. "Bad," leads can sometimes come back and update contact information and someone isn't a bad leader if they have real contact information and just don't engage at first. They may just be a long time out from buying or can ultimately refer you to business.

*** Permanent FUB Stages - can not be deleted or edited.**

Overview of Stages and Best Practices:
The "Lead" stage is really designed only for new inquiries that you haven't connected with. It is very important that you make it a focus to get all inquiries OUT of the lead stage.

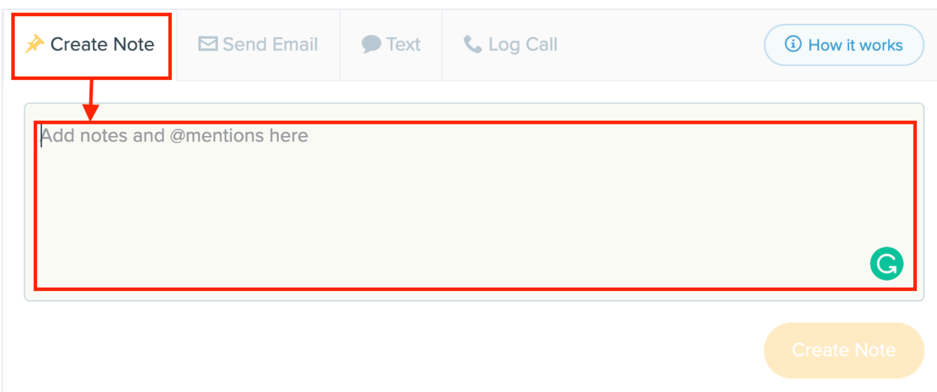
Nurture is generally a good default if you "don't know what to do" with someone but want to market to them

NOTES

Keeping great notes in FUB helps us all. Many of these leads will be dripped on for months or years and then suddenly reach out to you to help. This will allow you to pick up where you left off and have an idea of a client's area of interest, price point, other family member names, etc.

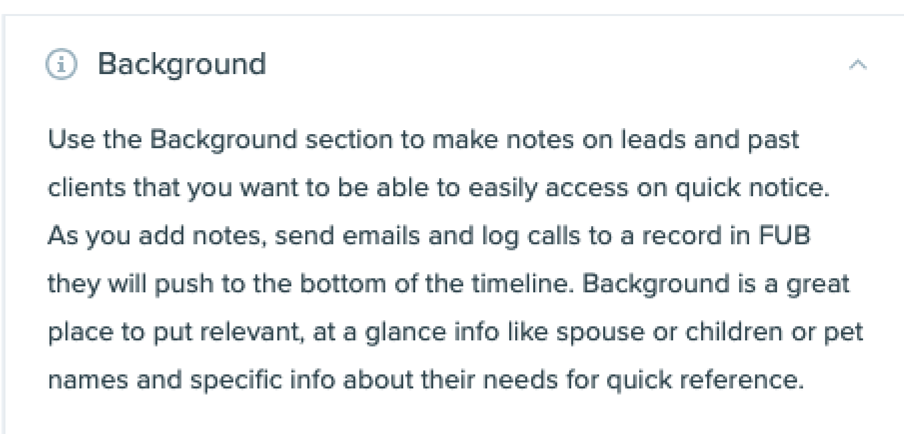
Notes are also how company owners and management assess activity and your communication with leads and clients. Additionally, if one of your contacts is a client and you are out of town, it can allow us to best serve them or get them to the right person without contacting you.

Here's how to make a note in FUB:



We also recommend using BACKGROUND for any information you want to always see at the "top" such as the type of properties they are looking for, price point, family info, etc.

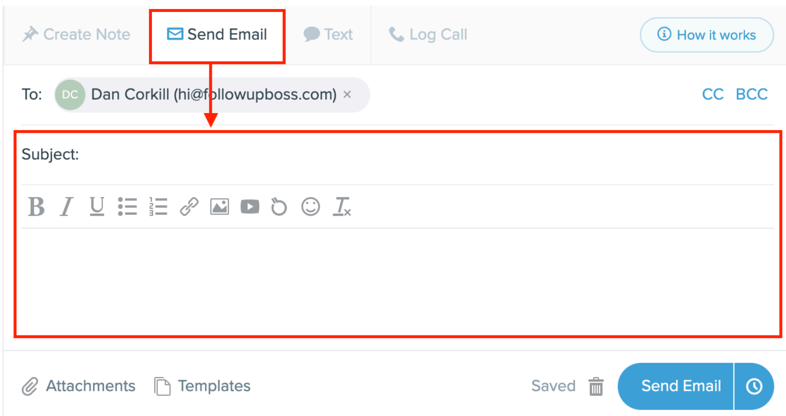
Background is on the left panel:



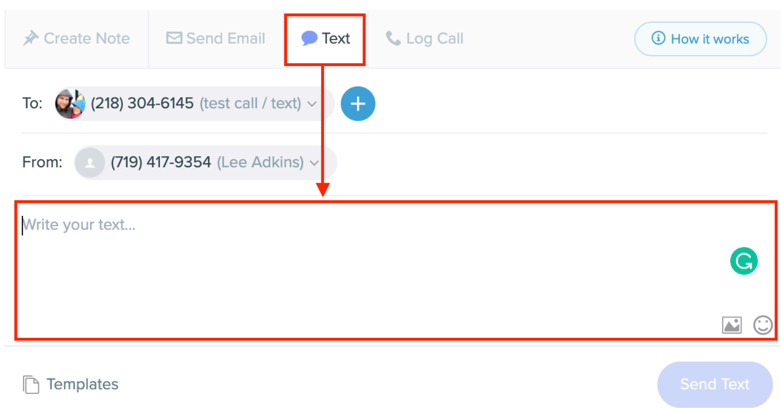
LOGGING CALLS, TEXTS & EMAILS

You should always log any communication with leads, prospects, and clients - be sure your email and phone are connected in the FUB settings in the top right menu.

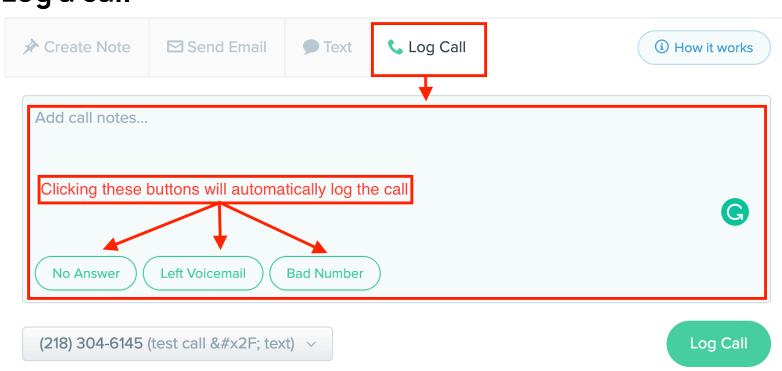
All these actions are similar to making a note, but there are different “tabs” to send an email:



Send a text:



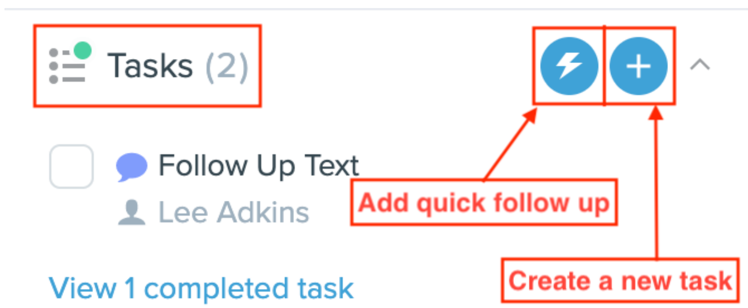
Log a call:



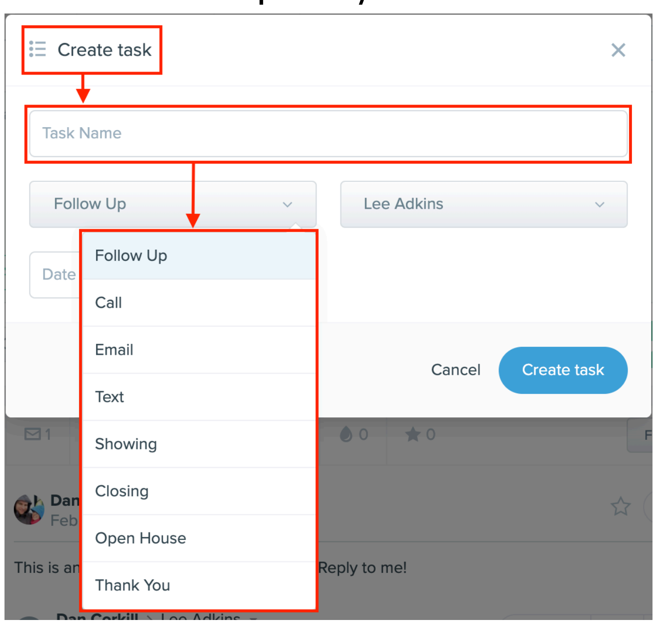
TASKS/FOLLOW UP

You can easily create a task to remind you to do a certain action connected to a certain client. For example, “call Suzy on Friday to discuss the weekend showings.” This creates a reminder in your dashboard showing as “Tasks Due.” A Follow Up is just a simplified task that’s a call, email or similar. So it’s basically an easy way to create a task with nominal typing or details – ex. “call Suzy in 3 days.”

Here’s how to add a task:

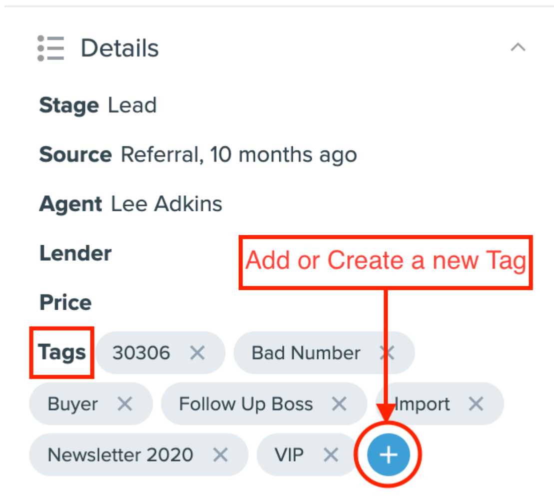


And here are the options you can choose to create tasks for:



TAGS

A tag is a way to categorize leads of a certain type. Most tags come in with leads automatically such as lead type or the zip code in which they are looking. Tags can help you identify ways of generating business, such as contacting all your “closed 2020” clients by clicking on the tag on the right-hand side to view all contacts with that tag assigned. Please do NOT create new tags without discussing with management.

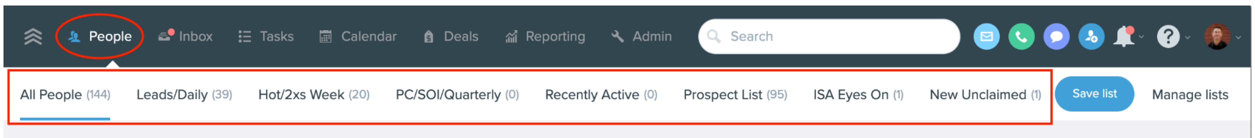


One of the best uses of tags is that if you click on a tag, the system will show you all contacts in the system with that tag. This can be very useful when following up with leads or past clients in a certain area, with a specific interest, or otherwise people who are tagged a certain tag.

Recommended Tagging Structure:
Contact Type: Tags = Buyer, Seller, Buyer & Seller, Renter
Contact Motivation: Tags = Hot, Warm, Cold, Unknown

SMART LISTS

Smart Lists are lists you can save that will show all contacts in FUB that meet certain criteria. These are the lists you will see when you go to the "People" tab and the clients you need to focus on.



Recommended Smart Lists:

1: TALK TO NOW!
- Stage:
    - Lead
- Last communication is empty

2: HIGH PRIORITY
- Tag(s)
    - YPRIORITY
    - HANDRAISER

3: AI Engaged
- Tag(s)
    - AI_ENGAGED
    - AI_INTERESTED
    - AI_NEEDS_FOLLOW_UP

4: Leads No Communication Yet
- Stage:
    - Attempted Contact
- Created less than 11 days ago
- Last Communication is more than 12 hours ago

5: ACTIVE CLIENTS
- Stage:
    - Showing homes
    - Listing Agreement
    - Active Listing
    - Under contract

6: NEEDS FOLLOW UP
- Stage:
    - Spoke with Customer
    - Appointment Set
    - Met with Customer
- No communication in 28 days ago

7: HOT FOLLOW UP
- Stage:
    - Spoke with customer
    - Met with customer

- Tag(s):
    - HOT
    - Hot Prospect
- No communication in more than 3 days

8: WARM FOLLOW UP

- Stage:
    - Spoke with customer
    - Met with customer
- Tag(s)
    - WARM
    - B- Warm 3-6 Months
- No communication in more than 10 days

9: COLD FOLLOW UP

- Stage:
    - Spoke with customer
    - Met with customer
    - Nurture
- Tag(s):
    - COLD
    - Cold 6+ Months
- No communication in more than 25 days

10: DROPPING THE BALL

- Stage EXCLUDES:
    - Showing Homes
    - Under Contract
- Recently active in the last 3 days with no communication in 12 hours

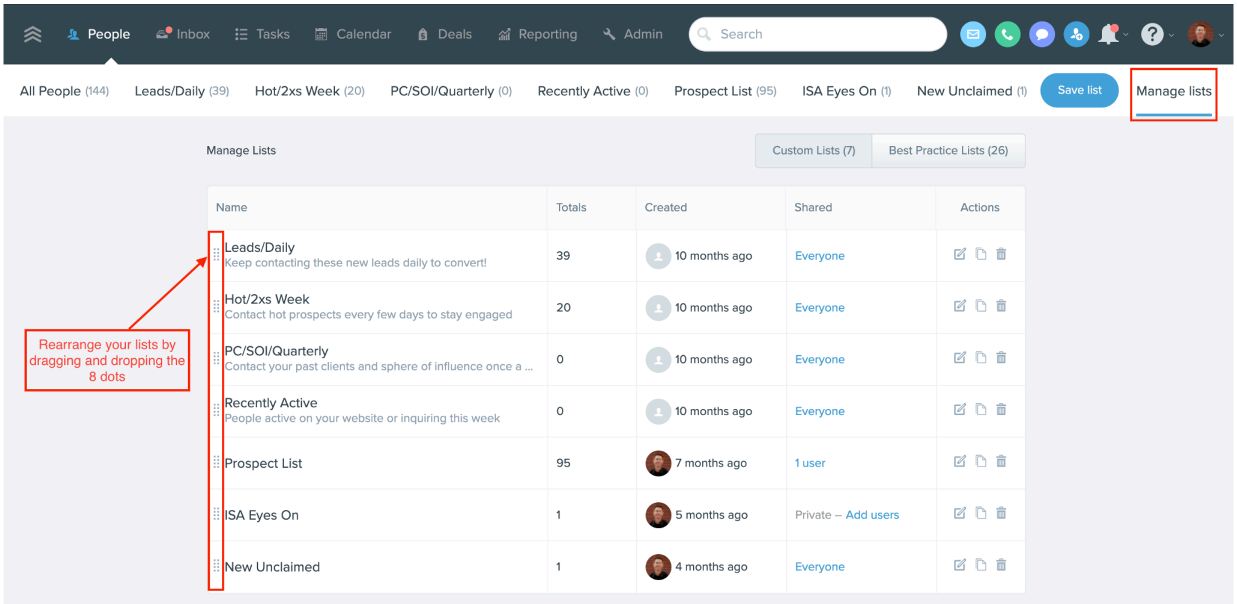
11: Recently Closed Follow Up

- Stage:
    - Closed
- Tag(s) EXCLUDES
    - Past Client
- No communication in 14 days

12: Past Client/Quarterly

- Tag:
    - Past Client
- No communication in 90 days

Rearrange your Smart Lists:



DEALS

We strongly encourage using Deals to organize your overall pipeline sales. This is a great way to manage reporting on your transactions, track overall company transactions, GCI, and track agent closings.

- **Buyers:**
  - Buyer Contract
  - Home Inspection
  - Appraisal
  - Pending
  - Closed
  - Cancelled Contract
- **Sellers:**
  - Listed
  - Home Inspection
  - Appraisal
  - Pending
  - Closed
  - Expired or Cancelled

ACTION PLANS

There are 3 types of action plans in FUB – those applied automatically as a lead comes in, those started by an Automation, and those that you manually apply once you assess the lead and their time frame.

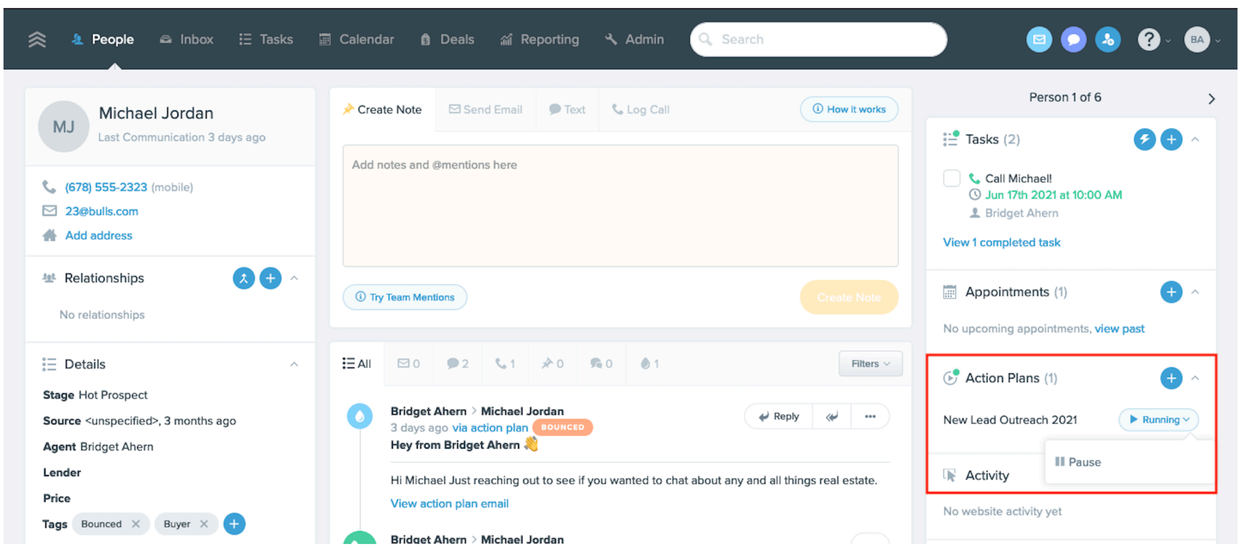
AUTO-APPLY ACTION PLANS (Drips)

All new leads assigned to you via Follow Up Boss will get auto-applied action plans DRIPS based on the source of the lead.

These DRIP action plans STOP when certain actions happen – as they are intended to just have a general engagement with the lead and help you make direct contact when the lead first comes in.

Actions that will stop these Drips include:

- The lead replies to you via one of the FUB Drip emails
- The lead replies to you via text IN FUB (not a text message direct to your cell phone)
- You log a phone call lasting more than 2 minutes in duration (logged through the Calling feature or FUB mobile app calling). The 2-minute duration is in place to prevent short calls or voicemails from pausing the Action Plan. If you are logging a call manually through the desktop version, you should manually pause the plan.

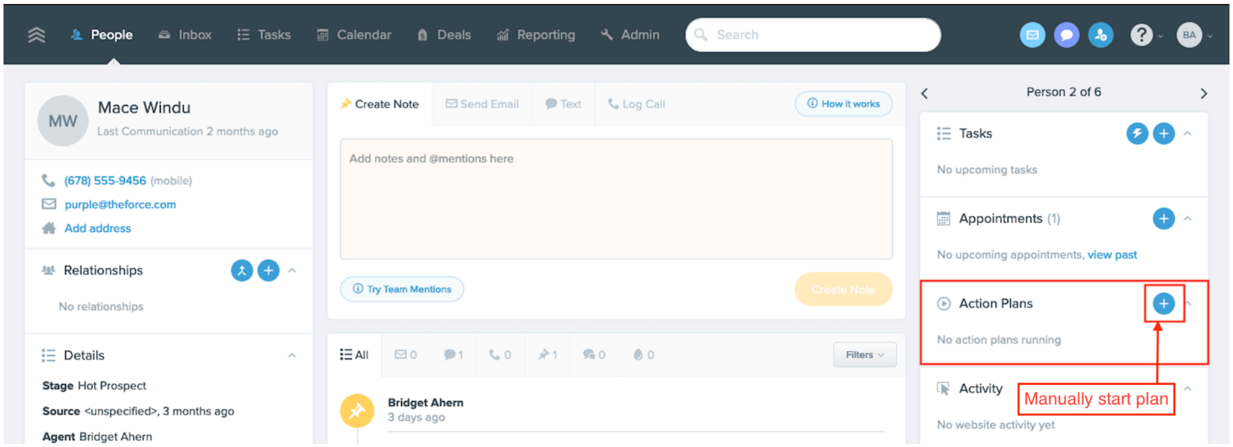


IMPORTANT NOTE: The lead must reply to an <u>action plan email or text</u> in order for the action plan to pause. (Emails through a connected google or outlook mail won't count towards this - agents can manually stop these plans too, by doing the following in FUB

MANUALLY-APPLY ACTION PLANS (Action Plans):

There are other action plans that you can manually apply to leads and prospects. These are usually just a basic, fairly generic touch, designed to remind them of you or re-engage them to reply to you.

Here's where you go in FUB to add a contact to an action plan (at bottom right in each contact record):



GENERAL FUB BEST PRACTICES

Always always call or appropriately reach out to new leads. The drips and action plans in Follow Up Boss are designed to engage, but nothing replaces a real attempt at contact by a knowledgeable agent.

You will get 2 types of “alert” emails from FUB. A “NEW LEAD” alert is a new lead assigned to you. A “LEAD ALERT” is activity on an existing lead so be sure to check their history, your notes and what their new inquiry is before contacting.

Addresses are MAILING addresses. Please do not put in a listing address a lead inquired on as address. We request that you as the agent will add closed addresses and change the stage to Closed and apply the tag “Closed2023” or the appropriate year the transactions closed.

****SOLICITATIONS** – Please also mark solicitations contacted or move to stage trash. If you do not, you will continue to get reminders as if they are an unactioned lead.

When to TRASH a lead: Please ONLY trash a lead if it is a solicitation or spam or mass email. “Bad,” leads can sometimes come back and update contact information and someone isn’t a bad lead if they have real contact information and just don’t engage at first. They may just be a long time out from buying or can ultimately refer you business.

Reassigning to another agent - please make a note THEN reassign - as you won’t see the lead once you reassign it.

If you are BOTH working the lead or otherwise both need to see it, you can add the other agent as a collaborator.