Follow Up Boss Cheat Sheet

Agent Daily Workflow

- ☐ Contact all new leads first - **1: TALK TO NOW!** Smart List
- ☐ Then contact the **1.5: HIGH PRIORITY** Smart List
- ☐ Check your Tasks and Appointments for the day in FUB
- ☐ Then contact the remaining Smart Lists **3-10**
- ☐ Be sure to use the FUB Dialer to log all calls and texts automatically
  - ☐ Log call notes if made contact
- ☐ Make appropriate Stage changes based on conversations or reach out attempts to keep your Smart Lists, Action Plans, and follow up procedures (i.e. 10 calls in 10 days, etc.), accurate

STAGES

Stages are used to accurately push leads through the sales cycle. It's important to make sure contacts are always updated to give you an instant look at your sales pipeline.

- **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 <u>ONLY</u> 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.**

AMPLIFIED SOLUTIONS

🚨 **Best Practice** is to always keep people tagged appropriately to stay on track to keep Action Plans and Smart Lists accurate. 🚨

SMART LISTS

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

- **1: TALK TO NOW!** - Leads with no communication
- **2: HIGH PRIORITY** - Leads with YPRIORITY and HANDRAISER tag(s)
- **3: AI Engaged** - Leads with AI_ENGAGED, AI_INTERESTED and AI_NEEDS_FOLLOW_UP tag(s)
- **4: Leads No Communication Yet** - Leads in Attempted Contact stage with no communication in more than 12 hours and is created for less than 11 days.
- **5: ACTIVE CLIENTS** - Clients in Showing Homes, Listing Agreement, Active Listing, and Under Contract
- **6: NEEDS FOLLOW UP-** Spoke with Customer, Appointment Set, or Met with Customer Stage with no communication in 28 days
- **7: HOT FOLLOW UP** - Leads in Spoke with Customer and Met with Customer stage with tag(s) "HOT" or "HOT PROSPECT" and no communication in more than 3 days
- **8: WARM FOLLOW UP** - Leads in Spoke with Customer and Met with Customer stage with tag(s) "WARM" or "B- WARM 3-6 MONTHS" and no communication in more than 10 days
- **9: COLD FOLLOW UP** - Leads in Spoke with Customer, Met with Customer and Nurture stage with tag(s) "COLD" or " C- COLD 6+ MONTHS" and no communication in more than 25 days
- **10: DROPPING THE BALL** - All stages EXCEPT Showing Homes and Under Contract stage and is recently active in the last 3 days with no communication in 12 hours
- **11: Recently Closed Follow Up** - Closed stage with no "PAST CLIENT" tag(s) and has no communication in more than 14 days
- **12: Past Client/Quarterly** - Leads with tag(s) "Past Client" with no communication in 90 days

AMPLIFIED SOLUTIONS

🚨 **Best Practice** is to always always keep your Smart Lists down to Smart List Zero (0'd out) to assure you're in contact with all the people you need to be. 🚨

AUTOMATIONS

- ➔ Moving a contact to the Nurture Stage will trigger a Nurture Action Plan
- ➔ Placing a contact with Fish tag will place the contact in the Go Fishin' Pond
- ➔ Moving a contact to the Go Fishin' Pond will trigger a Long Term Nurture Action Plan
- ➔ Placing a contact with the DNC tag will place the contact in the Do Not Contact Pond
- ➔ When a contact in the Go Fishin' Pond is active, contact will be reassigned to the Reassignment Pond
- ➔ Moving a Deal Stage to Pending will move the People Stage to Pending
- ➔ Moving a Deal Stage to Closed Stage will move the People Stage to Closed
- ➔ After 90 days contact from Closed Stage will move to Past Client Stage

DEALS & DEAL STAGES

Deals help you manage the transaction process, see where your deals are coming from, and most importantly, let you report on exactly how big your sales pipeline is. Each deals pipeline holds a series of stages which represents the sales cycle of a deal from lead to referral.

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

    - Pending
    - Closed
    - Expired or Cancelled

🚨 **Best Practice** is to actively stay on top of managing your transactions in Deals to have accurate data of deal flow. 🚨

PONDS

Ponds help you group leads into opportunities for the whole team to actively prospect. Instead of a Contact being assigned to a specific Agent, a Contact in a Pond allows **all** agents and users with access to that specific Pond to view that Contact. This is good for prospecting "stale" leads or to be able to create an inventory of specific Vendors or contacts that are useful for the whole team to access.

- Go Fishin'
- Do Not Contact
- Raiya-Ylopo Call Center

🚨 **Best Practice** is to attempt engagement on a contact and once you've "hooked" them to re-assign the Agent to you 🚨

Tags

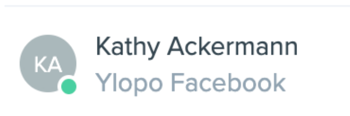
- Fish
- Hot
- Warm
- Cold
- Sphere
- Vendor
- Lender
- Home Inspector
- Agent

AMPLIFIED SOLUTIONS

- Working with another Agent
- Already purchased home
- Past Client
- Closed 2024

Quick FUB Setup and Use Tips

- The Green Dot in FUB lets you know that the contact is online (generally on your site) RIGHT NOW



- You can move the FUB widgets around in your own account - if you want to see tasks or the contact's Activity more easily, you can move those items to the top and it will only edit your account.
- Use Background for high-level information since it is easy to check at a glance when you send or receive additional info about a contact.

AMPLIFIED SOLUTIONS