

BUYER LEAD MANAGEMENT PROCESS

STEP 1 - INCOMING ONLINE BUYER

- Agent must verify contact information (full customers name)
- Incoming lead is automatically added to the CRM
- Log the call and add notes
- Set appointment on CINC, sync Google Calendar (immediately)
- Zillow leads - auto text- all new leads - regardless of stage
- Automated Label " HOT "
- This will trigger the below text message:

*This is [AGENT FIRSTNAME], your Zillow Premier Agent. As discussed, I will be sending you an email outlining the next steps. In the meantime, if you have any questions, please feel free to contact me directly at the number below.
Phone Number: [AGENT CELLPHONE]
Email: [AGENT EMAIL]*

STEP 2 - APPOINTMENT SET

- Automatic email including a blank copy of the 1 time showing agreement
- Change status to " appointment set", this will trigger below email:

Hi [FIRSTNAME],

I'm excited to work with you! Before we begin touring homes, please review and sign the Showing Agreement you will receive from Dotloop for e-signature.

A written agreement is required by law for us to tour homes. If you prefer to sign this form in person we can meet prior to the showing at my office located at ADDRESS

*Here's the form for your reference: [First Time Showing Agreement](#)
Also, I've included a digital "[Home Buying: Step-by-Step Guide](#)" with valuable information about the home-buying process.*

If you need further explanation or wish to discuss, please contact me on my personal cell phone at [AGENT CELLPHONE].

STEP 3- DOTLOOP E-SIGNATURES

- Non exclusive - One Time Showing Agreement
- Sent via Dotloop - mobile app - e-signatures - Agent's responsibility
- Agent to confirm it is signed prior to the appointment

STEP 4 - APPOINTMENT MET

- Agent must schedule the buyer consultation at the end of the showing
- Add buyer consultation label for automation
- Set appointment on CINC,title " consultation" sync Google Calendar (immediately)

STEP 5 - BUYER'S CONSULTATION

- Apply "buyer consultation label" for automatic email to be sent out with the buyer's booklet (MPH BRANDED)
- ASK : BUYER CONSULTATION QUESTIONS
- EBBA (Exclusive buyer's agreement-Compass) to be signed at buyer consultation. Mandatory.
- Appt for showing homes must be set and change status to active client and " showing homes" in Zillow
- Find CINC template as: B- Buyer Consultation - buyer flip-book
- Hard copy of Buyer's Book to be delivered in person by agent (Customized with agent info)

Hi [FIRSTNAME],

It was great connecting with you!

To help you prepare for our meeting, I've included a digital "Home Buying: Step-by-Step Guide" with valuable information about the home-buying process.

Here's a summary of the steps we'll follow:

- *Initial Consultation: Discuss your needs, preferences, and budget.*
- *Pre-Approval: Get pre-approved for a mortgage to determine your buying power.*
- *Home Search: Start touring homes that match your criteria.*
- *Making an Offer: Submit an offer and negotiate terms.*

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- *Inspection & Appraisal: Schedule a home inspection and appraisal.*
- *Finalizing the Loan: Complete the mortgage process with your lender.*
- *Insurance: Obtain homeowners insurance to protect your investment.*
- *Closing: Review and sign all closing documents.*
- *Move-In: Receive the keys and move into your new home!*

This guide will help you navigate each stage of the home buying process smoothly. For more details, feel free to reach out at [AGENT CELLPHONE].

Looking forward to our consultation!

*Best Regards,
[AGENT FIRSTNAME]*

STEP 6- CLIENT CARE - TC

- Call after "24 hours of appt met"
- Satisfied customer - Script
- Unsatisfied customer - transfer process -ISA rules apply when selecting an another agent

STEP 7 - ACTIVE - SHOWING HOMES - BUT NOT BUYING

- CINC template B-Dont fire me report (Buyers) Agents must send weekly, bi-weekly or monthly via

STEP 8 - NURTURING PLAN

- Add Nurture label - automated (13 texts & emails) over the course of 365 days CINC