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Follow Up Cadence Manual

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The Follow-Up Cadence Table

Cadence is a sequence of touchpoints with a prospect to establish a connection for an engagement or a sale. It is typically a schedule to follow up with each propsect via phone, email, social media channels, etc."

-Nivedita Bharathi of Freshsales Blog

Stage	Update Request Interval
Lead/New	Upon Creation
Attempted Contact	Everyday for 3 days
Spoke with the Lead	Every 5 days
Appointment Set	
ISA Appointment Set	
Met with Customer	
ISA Appointment Met	
Missed Appointment	Check at Day 3
Rescheduled Appointment	
Showing Homes	Every 5 days
Submitting Offers	
Listing Agreement	Every 30 days
Active Listing	
Nurture	Every 28 days
Under Contract	Every 30 days
With Another Agent	N/A
Agent	
Closed	
Pond	Apply Text Drip
Trash	Apply Text Drip

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Lead/New Stage: Must Dos

- Leads must be contacted immediately by the assigned realtor, ISA upon their creation in CRM
- Lead stage must be moved to attempted Contact stage or appropriate stage on Day 1
- Leads assigned to standard and premium ponds can be contacted by everyone
- Leads assigned to a realtor through live transfer must be contacted within the day by the realtor
- Leads left uncontacted by the assigned realtor for a day shall allow ISAs too
- Leads left uncontacted by the assigned realtor for a day shall allow ISAs to contact the same
- Send video text messaging as needed

Attempted Contact Stage: Must Dos

Assigned to	Actions
Agent I.S.A.	• Must contact the lead daily for 3 days • Must set up follow up tasks for 2nd & 3rd days • Must apply the appropriate campaign drip • Must move to spoke with customer if successfully contacted or appropriate stage as needed • Running drip must be paused or ended as needed if successfully contacted
Agent	• Must move to pond if no contact withing 3 days
I.S.A.	• Must move to pond–general is no response on the 4th day
V.A.	• Must ask for an update from assigned agent or ISA daily for 3 days then move to pond–general is no update or action made by the latter • Must move to VA–ISA pond if no response on the 4th day

Source	Campaign Drop
Referral Portal Leads	New Lead Drip
PPC	New Lead Drip
Portal Leads	New Lead Drip
Internal	New Lead Drip
Other Sources	Property Inquiry

Order of Preference in Contacting a Lead

1. Calls
2. Text
3. Video Text
4. Email

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Spoke with Customer Stage: Must Dos

Agent	• Must contact the lead once every 5 days
I.S.A.	• Must contact the lead once every 5 days
V.A.	• Must remind the agent on Day 5 & 6 • Must contact the lead on Day 7 unless there is a valid task that gets completed or a relevant text drip • Must remind the agent on Day 12 & 13 unless there is a valid task that gets completed or a relevant text drip • Must contact the lead on Day 14 • Must re-assign to pond or nurture if no update from the agent or from the lead

Assigning of Appointments

I.S.A.	• Must directly assign home tour appointments to agents following the Agents for Direct Assign Document • Must post phone conult appointments in Slack following the format in Slack Appointment Format Document • Must directly assign the home tour appointment through CRM, Google Voice or direct message through Slack • In case that no agent has claimed nor responded to the text, call, or slack meddage, the same shall be documented in CRM Notes. Only then that the home tour appointment can be posted in Slack channel
V.A.	• Must reply “Yes” or “Me” in the thread of the posted phone consult or home tour appointments

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Appointment Set Stage: Must Dos

Agent

- Must set up the appointment in CRM correctly
- Must replay to the group text message sent by the VA-ISA immediately upon receipt
- Must follow up every 5 days
- Must correctly indicate the outcome and update the stage as needed
- Must note the lead completely and document action taken and plan

V.A.

- Must set up the appointment in CRM correctly
- Must send a group text to the lead and to the agent for the appointment confirmation
- Must remind the agent on Day 5 and 6 to follow and update the lead
- Must reach out to the lead on Day 7 as the assistant unless there is a valid task that gets completed or a relevant text drip
- Must remind the agent on Day 12 and 13 to follow and update the lead
- Must reach out to the lead on Day 14 as the assistant unless there is a valid task that gets completed or a relevant text drip
- Must re-assign to nurture if no update from both the agent and the lead
- Must document the lead properly

- Assigning Must set up the appointment in CRM correctly
- Must send a group text message to the lead and to the agent for the appointment confirmationof Appointments

Create Task For The Morning After the Appt Time

- Did the appointment happen?
  - FU with the agent if blank
  - If no response reach out to client "Hi prospect, this is ISA w/ Reside Platform. I just wanted to check in and make sure your appointment with agent's name went well. Our team prides itself on our collaboration so I want to double-check that you got what you needed."
- Does the lead need to be re-engaged?
- Does the lead need to be re-assigned?
- Should you or ISA nurture it instead of the agent?

Create Task For 7 Days After the Appt

- Does the lead need to be re-engaged?
- Does the lead need to be re-assigned?
- Should you or ISA nurture it instead of the agent?

Create Task For 18, 30, 90, 180 & 360 Days

- Is the agent still working with the lead?
- Should you reach out to the prospect?
- Should the lead be re-assigned or added to ISA nurture?

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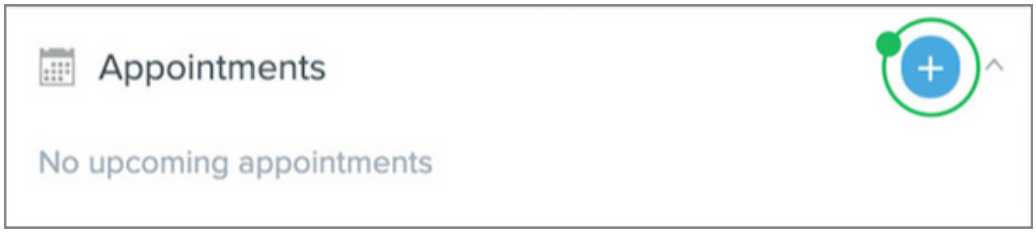
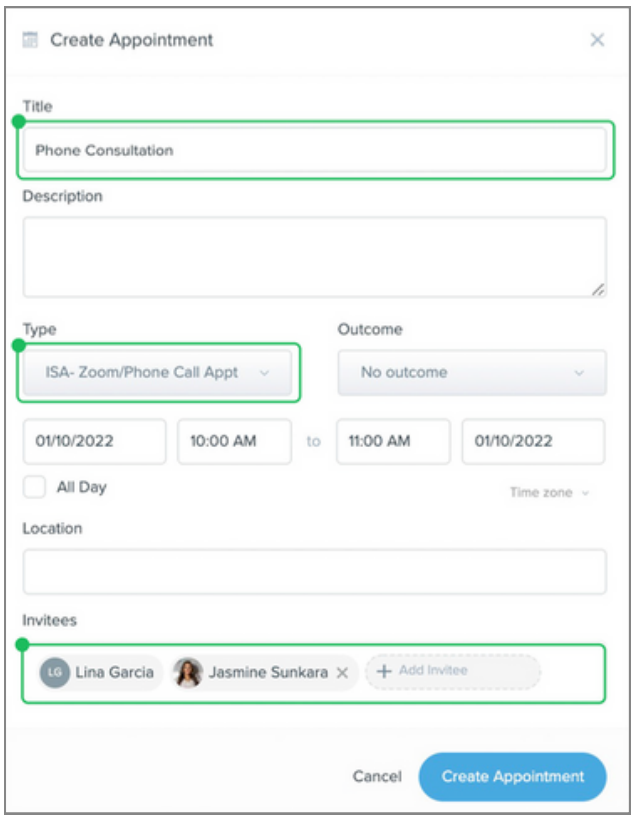
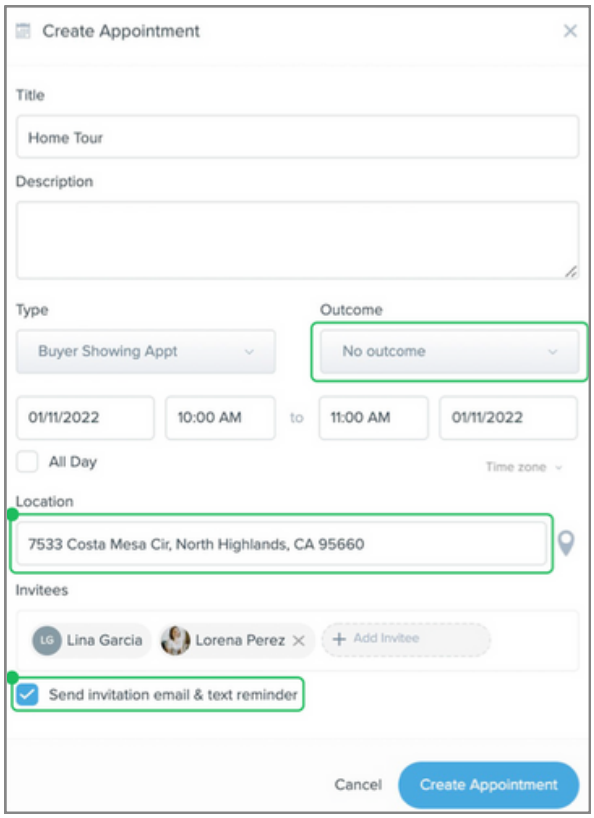
Setting an Appointment in FUB

1. Click the plus sign on the Appointments pane



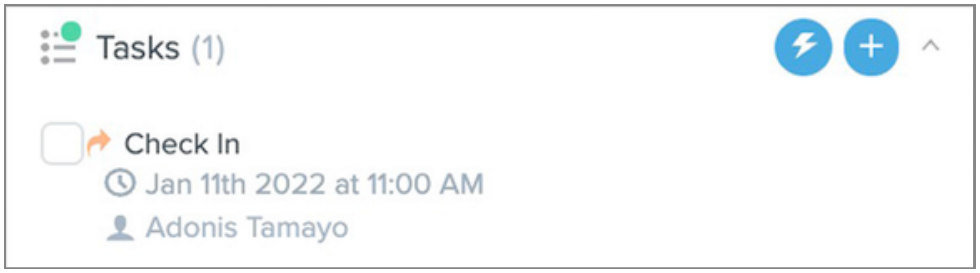
2. Indicate the appropriate title & type, address for home tour, & send invitation as needed





ISA's should no longer include their names as invitees

3. ISA's must set up the need follow up task accordinly



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Sending a Book Text Confirmation

ISA's

For appointments made through the text tools

Send via the text tool: Great! You wil receive a confirmation group text from one of my assistants ot introduce you with our showing agent.

Send via CRM: Hi Richard, thank you for waiting. This is NAME- assistant of Sonny. I have set you up for a phone consult for today at 11 AM with one of our top area specialists named Chris. His number is (000)000-0000 and his email example@email.com. Chris is included in this group text message. Please keep your line open. Take care and thank you for your time today!

ALM In Setting Up Appointments

ALM AUDIT: PHONE CONNECTION CHECK LIST	
AGENT	
SOURCE	
LINK	
SAMPLE DATE	
PARAMETERs	MET? YES/NO/NA
1) Did the Agent greet the customer introducing themselves as (Your Zillow Premier Agent or Your Premier Realtor.Com Agent)	YES
2) Did the Agent ask for and set the appointment (when do you want to see it or I see you want to see 123 Main Street at 2pm tomorrow, does that time still work for you?)	YES
3) Did the Agent ask if there were any other properties, they're interested in seeing?	YES
4) Did the Agent ask questions about their motivation? (What did you like about the home? Did the dig in on their questions for example, tell me more about the back yard. So, a large Kitchen is important to you?)	YES
5) Finally, did the end the call with a message about sending them the confirmation for the appointment via text/email with their contact information? Did they express their excitement about showing them the home?	YES
DISCUSSIONS AGENTS SHOULD NOT BE HAVING	DISCUSSED/ DID NOT DISCUSS
1. Are you pre-approved or have you spoken with a lender?	DID NOT DISCUSS
2. Are you working with another Agent?	DID NOT DISCUSS
3. What questions do you have for me?	DID NOT DISCUSS

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Rescheduled Appointment: Must Dos

Rescheduled Appointment

- Agent must have another appointment scheduled within 3 days
- VA ISAs will reach out automatically on day 4, 5, 6
- Send to pond with longer drip
- If agent decides to not work with appointment send to ISA direct

Missed Appointment

- Agent must change the outcome to missed and so as the stage
- Agent must contact the lead daily for 3 days
- VA ISAs will reach out automatically on day 4, 5, 6
- Send to pond with longer drip
- If agent decides to not work with appointment send to ISA direct

MET WITH CUSTOMER/ SHOWING HOMES/ SUBMITTING OFFER STAGES: MUST DOS

Agent	• Must follow up every 5 days • Must correctly indicate the outcome and update the stage as needed • Must note the lead completely and document action taken and plan
V.A.	• Must remind the agent on Day 5 and 6 to follow and update the lead • Must reach out to the lead on Day 7 as the assistant unless there is a valid task that gets completed or a relevant text drip • Must remind the agent on Day 12 and 13 to follow and update the lead • Must reach out to the lead on Day 14 as the assistant unless there is a valid task that gets completed or a relevant text drip • Must re-assign to nurture if no update from both the agent and the lead • Must document the lead properly

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Under Contract Stage: Must Dos

Agent	• Must update every 30 days as needed • Must note the lead completely and document action taken and plan
V.A.	• Must NOT text the lead

Sale Close / Closed Stage

- No update is required
- Best practice is to reach out quarterly

Nurture Stage: Must Dos

Agent	• Must folow up every 28 days • Must follow up as requested (e.g. quarterly)
V.A.	• Must reach out to the lead on Day 28 as the assistant unless there is a valid task that gets completed or a relevant text drip

Listing Agreement / Active Listing Stage: Must Dos

- Follow up every 30 days

Trash / Pond Stage

- No follow up is needed
- ISAs must ensure that PA assignment and stage is updated
- Apply Text Drip

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