

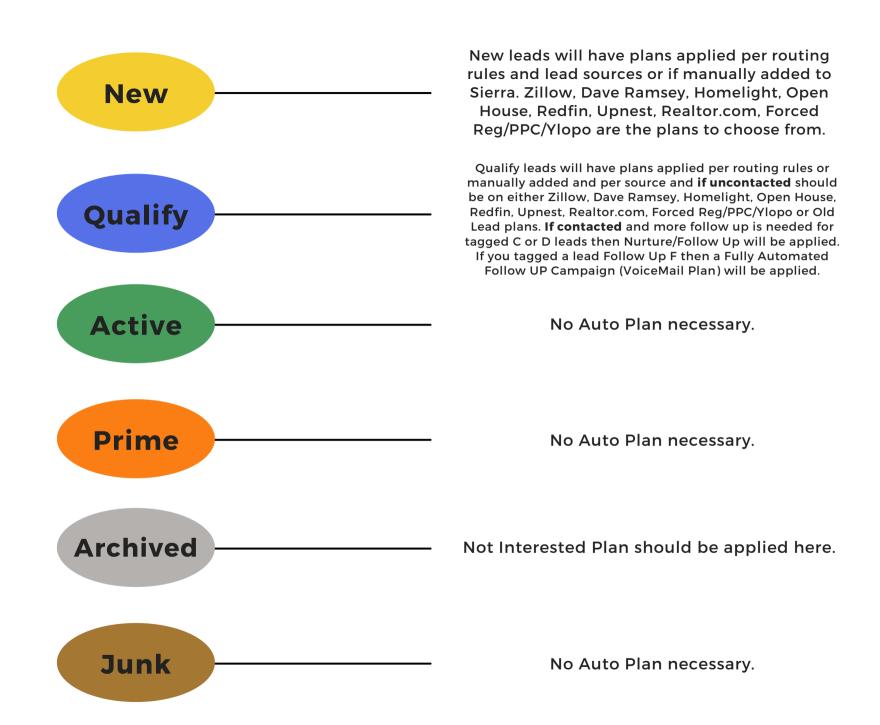
LQ (Low Quality): Used for PPC type leads or leads that take longer to convert. HQ (High Quality): Used for Zillow type leads or leads that cost more and tend to

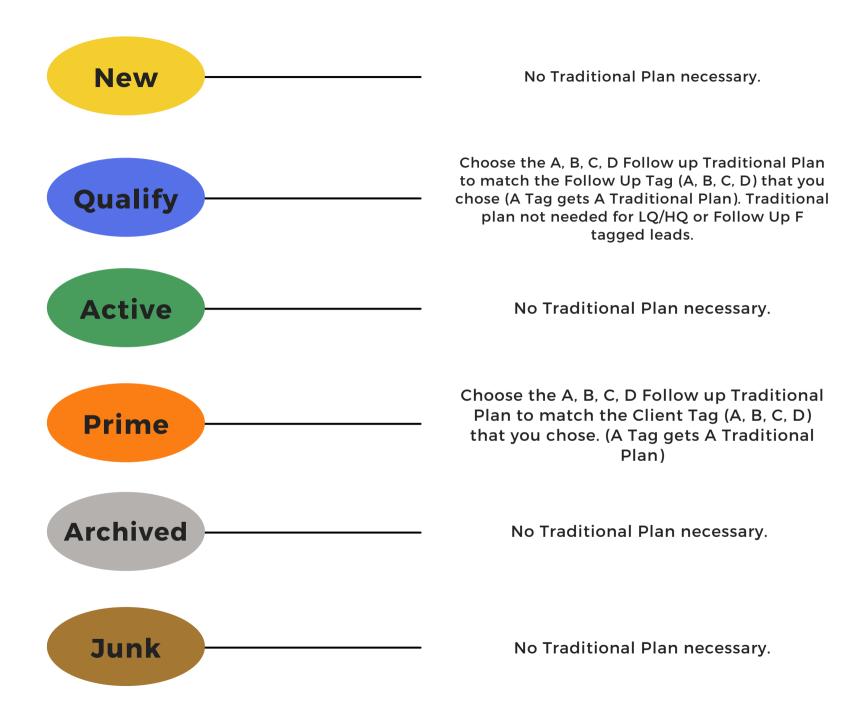
convert quicker.

Follow Up A, B, C, D, F or AT (Active Text): Used for all leads that were contacted but more time is needed before they start the process or commit to working with you.

Client A, B, C, D: Used for all leads that have committed to working with you to buy or sell a property.

These leads typically fall under the Archived status. No tag necessary.





- When adding a new tag, remove the old one.
- Qualify leads should have an Uncontacted or Follow Up tag **AND** a plan running in the form of a <u>Fully Automated or Traditional</u>.
- Prime leads should have a Client Tag **AND** a <u>Traditional Plan</u> to match (Client A will get a Follow Up A Traditional Plan).
- Archive leads do not need a tag just a <u>Not Interested Fully Automated Action</u> <u>Plan</u>.

## When it comes to follow ups you have a few options:

- 1. If you tagged your lead a Follow Up A or B then you apply the Follow Up A or B <u>Traditional Plan</u>
- 2. If you tagged your lead a Follow Up C or D then you apply the Follow Up C or D <u>Traditional Plan</u> **AND** the <u>Nurture Follow Up Fully Automated Plan</u>.

## OR

- 3. Regardless of time frame you can tag a lead that needs follow up with just the Follow Up F tag and then apply one of the Fully Automated Follow Up Campaigns (Voicemail Plans). Make sure to choose the campaign that best fits their timeframe (Now, 1, 2, 3, 6, 12, 18, 24 months).
  These leads do not need a Traditional Plan applied.
- Fully automated plans are a set and forget. You set it and the system does the work for you in terms of sending out texts, emails, and voicemails.
- Traditional plans are a set and remind. You set a traditional plan to remind you to check in. You will see this reminder in the form of a task at the top of Sierra.
- Each Day zero out your Past due tasks, Inbox, New, SPA, YPA, and Lost Lead buckets.
- Reach out via Marco Polo with any questions, concerns, or troubles with both Hatch Systems and Sierra.