CATEGORIES

HATCH COACHING

New	Newly Registered/ Added Leads go here.
Qualify	Uncontacted leads and leads that have been contacted but need further follow up go here.
Active	Leads that you have an appointment with go here.
Prime	Leads that you have commitment from (listing/buyer agreement) go here.
Archived	Leads that are not interested go here. Basically not a yes but didn't say no or stop.
Junk	Leads that should not get anything automated go here.

HATCH COACHING

TAGS

New — No Hatch tags necessary.

Qualify — LQ or HQ if uncontacted.
Follow up A, B, C, D, F or AT if you made contact but more follow up is necessary before they are ready.

Follow up/Client:
A: 0-30 days out
B: 30-90 days out
C: 90-180 days out
D: 180+ days out

Active — No Hatch tags necessary.

Prime — Client A, B, C, or D dependent on timeframe.

Archived — No Hatch tags necessary.

Junk — No Hatch tags necessary.

TAGS Continued

HATCH COACHING

Uncontacted Leads

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.

Contacted But Needs More Follow Up

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.

Committed to Working With Me

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

Not Interested

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

FULLY AUTO PLANS

HATCH COACHING

New

New leads will have plans applied per routing rules and lead sources or if manually added to Sierra. Zillow, Dave Ramsey, Homelight, Open House, Redfin, Upnest, Realtor.com, Forced Reg/PPC/Ylopo are the plans to choose from.

Qualify

Qualify leads will have plans applied per routing rules or manually added and per source and **if uncontacted** should be on either Zillow, Dave Ramsey, Homelight, Open House, Redfin, Upnest, Realtor.com, Forced Reg/PPC/Ylopo or Old Lead plans. **If contacted** and more follow up is needed for tagged C or D leads then Nurture/Follow Up will be applied. If you tagged a lead Follow Up F then a Fully Automated Follow UP Campaign (VoiceMail Plan) will be applied.

Active

No Auto Plan necessary.

Prime

No Auto Plan necessary.

Archived

Not Interested Plan should be applied here.

Junk

No Auto Plan necessary.

TRADITIONAL PLANS

HATCH COACHING

New	No Traditional Plan necessary.
Qualify	Choose the A, B, C, D Follow up Traditional Plan to match the Follow Up Tag (A, B, C, D) that you chose (A Tag gets A Traditional Plan). Traditional plan not needed for LQ/HQ or Follow Up F tagged leads.
Active	No Traditional Plan necessary.
Prime	Choose the A, B, C, D Follow up Traditional Plan to match the Client Tag (A, B, C, D) that you chose. (A Tag gets A Traditional Plan)
Archived	No Traditional Plan necessary.
Junk	No Traditional Plan necessary.

HATCH SYSTEM TIPS

- 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 Fully Automated or Traditional.
- Prime leads should have a Client Tag **AND** a Traditional Plan to match (Client A will get a Follow Up A Traditional Plan).
- Archive leads do not need a tag just a Not Interested Fully Automated Action Plan.

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 Traditional Plan
2. If you tagged your lead a Follow Up C or D then you apply the Follow Up C or D Traditional Plan **AND** the Nurture Follow Up Fully Automated Plan.

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.