

Lead Stages Defined



Lead

— Default stage when a lead is generated and “New” in FUB. Once contact is attempted, the stage should be changed regardless of call outcome.



Must be called weekly

Intent to buy or sell within 30 days or less



Must be called twice a month

Buying or selling in 1 - 6 months



Must be called once a month

Buying or selling in 6 months or more, but Agent wants to keep vs putting in the pond

Unknown

— Contact has been attempted, but no connection has been made and the timeline is unknown.

Cold

— Confirmed real person, but not buying or selling anytime soon and just likes looking at homes for curiosity/fun. Not worth the follow-up commitment of a “C”. Cold leads will be on Action plans, contacted by AI (Raiya), and remarketed via Ylopo.

Agreement Signed

— You have a signed Buyers or Sellers representation, but it is not currently Pending.

Active Listing

— Listing is live in MLS as Coming Soon, New, etc.

Appointment Set

— Any lead that an appointment has been set whether a listing appointment or home showing.

Pending

— Fully executed contract and in escrow.

Past Client

— Closed escrow successfully and has been set up on our Past Client follow-up cadence.

Closed

— Closed escrow successfully and has not yet been put into a past client follow-up cadence.

Do Not Contact

— Lead has stated they are not interested and requested to be removed from the contact list. Please unsubscribe for searches, emails, and texts. Move to Graveyard Pond. Only reach out if they request it.

Trash

— Leads that the team leads have deemed to be removed from active stages. If you want a lead trashed please mention a team lead and the lead coordinator. DO NOT TRASH LEADS YOURSELF

Referred

— Referred to another agent and awaiting a referral. Note the referred agent in Background with contact information.

Buyer

— Used for Conversion Monster only

Seller

— Used for Conversion Monster only