

SRG/Chime Team Lead Info

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SRG/Chime Team Lead Info

Team Lead Enters Chime

AI tries to engage the lead for up to 5 days via chat/text.

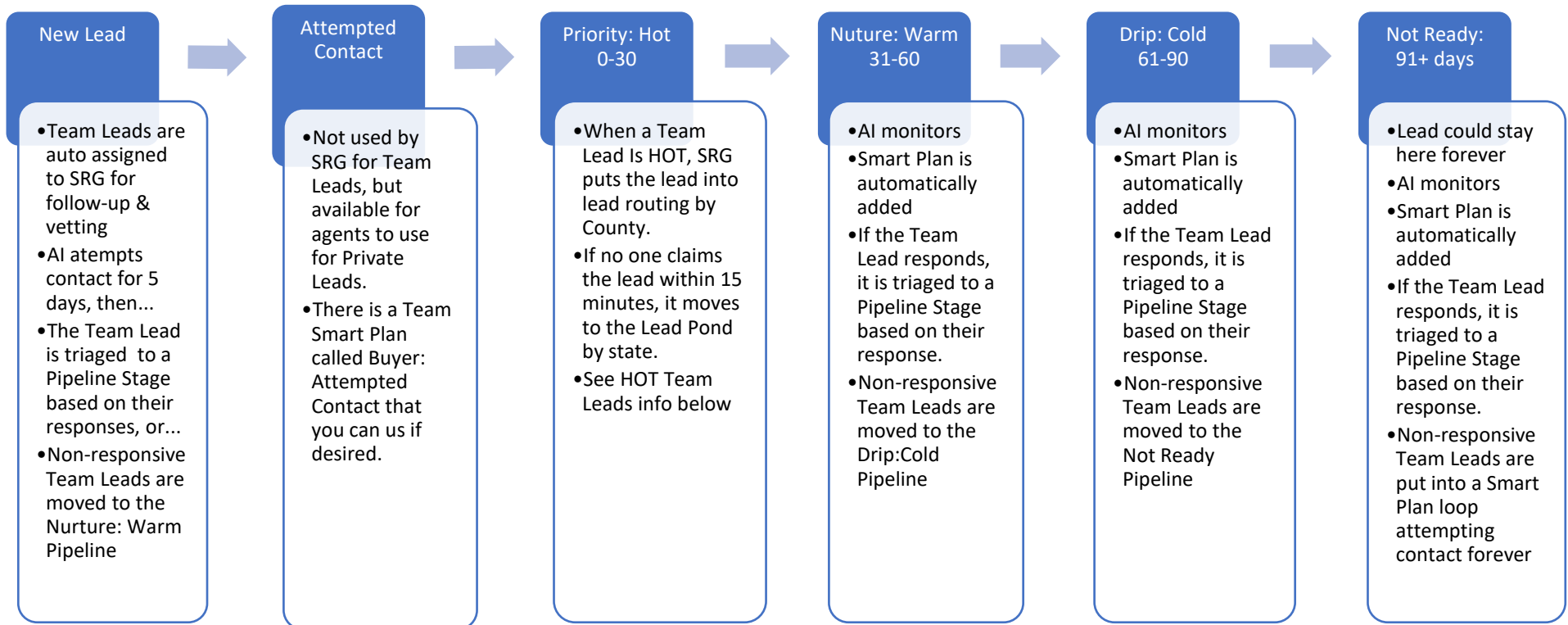
AI auto assigns a Tag when qualifying a lead.

Cathy Leibensperger will be vetting & following up with leads until they are HOT.

Cathy will add notes as she preps the leads for agents.

Hot Leads are added to Lead Routing. *See below for how to claim leads.*

Pipeline Stages



Groups- check them daily

Actionable Lead- If the lead responds, they show up in the Group “Actionable Lead”. **Call the lead**, determine what action to take. **Add notes**, then manually move them to the appropriate pipeline stage. Once completed, delete them from the Actionable Lead Group.

Lead Score 70+- Determine if action is needed & **call or text** the lead. **Add notes**, then manually move them to the appropriate pipeline stage. They should automatically be removed from this group if their Lead Score drops below 69 or remove them manually.

Adjust Alerts- Add alerts to the lead, then remove them from the Adjust Alerts Group.

How to Claim a HOT Lead

Initial Lead Routing (by county)

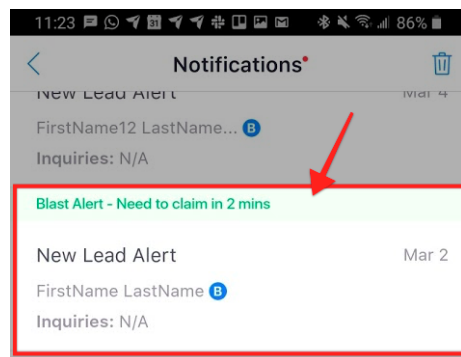
- HOT Team Leads will be added to Lead Re-Routing. A Blast Alert goes to all agents who serve the county. The notification will say there is a new lead to claim.
- You may claim this type of alert via the mobile Chime App or your desktop.
- The first recipient to claim the lead by clicking the “Claim” button from a notification will be the one to receive it.
- Do not contact the lead until you claim it & verify it has been assigned to you.
- If no one has claimed the lead within 15 minutes, it will move to the Lead Pond where it will stay until someone claims it.
- **Note: The lead is not technically “assigned” to you until you Claim it & your name is in the “Assigned to” section of the lead profile.**

Claiming a Lead from Lead Routing- click the Claim button in the Alert

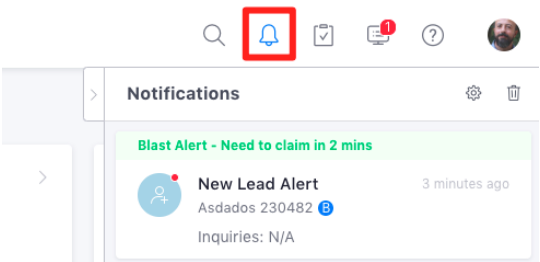
Here is what the text notification will look like for Blast Alert:

Hi it's Chime! Test Lead6512 was assigned to you via lead routing. Pls claim them in 2 minutes.

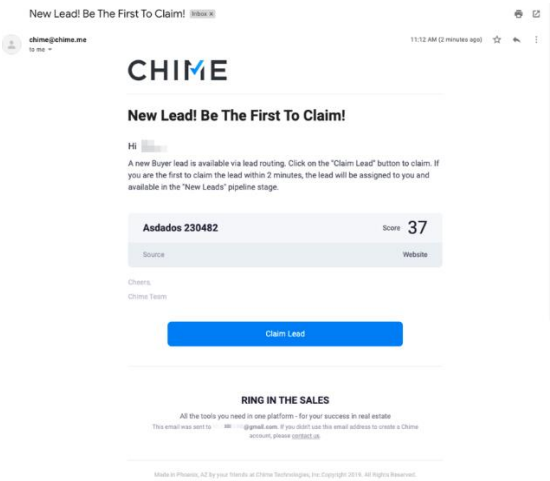
Here is what the Chime mobile app notification will look like for Blast Alert:



Here is what the notification will look like in the web app (desktop) for Blast Alert:



Here is the email notification that an agent/user will receive for Blast Alert:

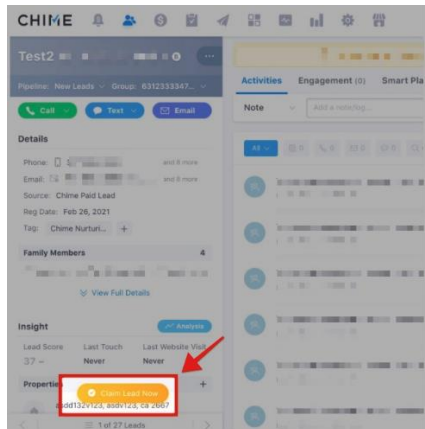


Lead Pond (by state)

- After 15 minutes of being in the County lead routing, if no one has claimed the lead, it will be added to a state Lead Pond.
- The lead will remain in the Lead Pond until someone claims it.
- **You may claim this type of alert via your desktop only.** (Chime is working on the phone app version, but no ETA)
- Claim the lead by clicking the “Claim” button in the lower left section of the lead profile.
- Do not contact the lead until you claim it & verify it has been assigned to you.
- **Note: The lead is not technically “assigned” to you until you Claim it & your name is in the “Assigned to” section of the lead profile.**

Claiming a Lead from the Lead Pond

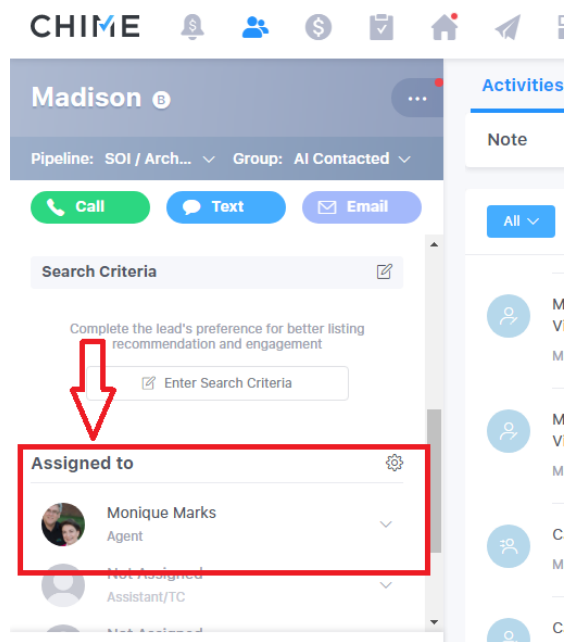
To claim a lead from the lead pond, simply enter the **Lead Profile** page and then click on the orange **Claim Lead Now** button at the bottom-left:



How to Work a Lead

- Verify that the lead is assigned to you before you contact them. *See image below.*
- Call them right away- Speed to Lead!
- Day 1 Follow up plan <https://www.youtube.com/watch?v=wq9wdnJtcAI>
- **Log call specifics in the Notes section, also log attempted interactions.**
- **Move lead to the appropriate Pipeline Stage**
- Follow up, follow up, follow up... forever! For help with follow up automation contact Monique@SpringerRealtyGroup.com.

How to verify a lead is assigned to you



What to do when the lead goes under contract

There is a 60/40 split for Team Leads that result in a deal (60% to the agent).

- Move the Team Lead into the “Under Contract” pipeline stage.
- **When you enter the transaction into Paperless Pipeline:**
 - **Select the Lead Source “SRG/Chime Team Lead”**
 - **Make a note in the Commission Summary section stating “SRG Lead 60/40 split”**
- Once the transaction is completed, move the lead to the “Closed” pipeline stage.
- Add the closing date to the Lead Profile & add a Home Anniversary Smart Plan.
- Have a plan for continued communication with the client. Smart Plans can help automate the process.

What to do if you claim a lead that you don’t want

- Make a note as to why you don’t want the lead & check the box next to “Pin to Top”.
- Put the lead back into the appropriate Lead Pond (by state).

Questions?

Contact: Monique@SpringerRealtyGroup.com

Chime Time Weekly Support

Every Tuesday at 10:00 offered via Zoom

<https://us02web.zoom.us/j/87977108811?pwd=OHZkWjYvbUlzQTRCZFF5c3d1Qjczdz09>