LeadRouter 3.0 Agent Incubation Tools Guide

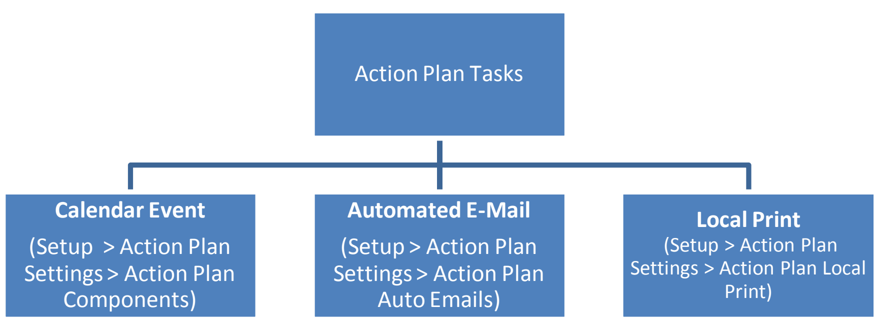
LeadRouter – Incubation Tools

Your LeadRouter account includes automated tools to help you create a systematic approach to incubate your leads. LeadRouter lets agents, company administrators and your brand create “action plans” that can “drip market” to prospects over any period of time.

Action plans are customizable at the company, office, and agent level (depending on business rules). Each user can access their personal plans as well as any “global” brand, company and office-level templates. Action plans can then be applied to any lead within the user’s account.

Use the LeadRouter incubation tools to create a consistent process for communicating with leads, as well as reducing the number of leads that are abandoned too early. LeadRouter incubation tools enable users to create follow-up plans for short- and long-term leads, maintain existing customer relationships and past/closed clients to generate referrals and repeat business.

Action plans consist of a series of tasks, emails and activities that will appear in the user’s LeadRouter calendar. Tasks can occur on absolute dates (i.e., January 12) or relative dates based upon the completion of a previous task (i.e., 2 days after the last activity). Tasks can be reminders to make a call, send a follow up letter, mail an item, etc., as well as automated features such as drip emails.



Action plans could be created for:

- Short Term Follow Up Plan (30 days)
- Medium Term Follow Up Plan (90 days)
- Long Term Incubation Plan (6-12 months)
- Simple Annual Occurrence (Birthday, Purchase Anniversary, etc.)
- Calendar Monthly Contact Plan (Annually)
- Customer for Life Plan (Multi-Year)
- Relocation Plan
- Vacation / Investor Plan

Action Plans
Action plans are automated follow-up/event plans to keep in touch with leads. Plans can be created by your brand, company, and agents. Permission levels are assigned by the creator. For example, agents can use plans created by company or brand but cannot edit those plans. Agents can create and edit their own plans entirely.

Example of an Action Plan

•Day 1	Email 1: Thanks for contacting me
•Day 5	Email 2: Let me know how I can help
•Day 10	Activity 1: Follow up call (in calendar)
•Day 15	Email 3: Visit our Website
•Day 20	Activity 2: Send a e-card or mailing item
•Day 25	Email 4: Ready to Assist You
•Day 30	Activity 3: Follow up call (in calendar)

Once a user applies an action plan to a prospect, some or all of the following can occur:

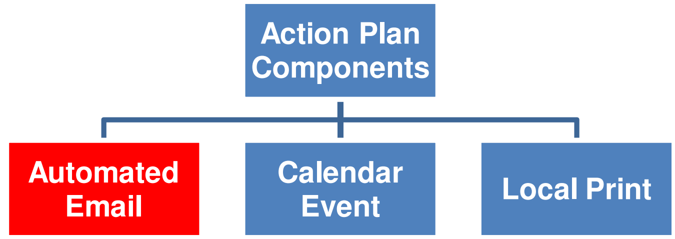
• The LeadRouter system automatically sends emails to the prospect
• Activities appear in the user's Calendar

Some things to remember about the incubation tools:

• Completing an item in the action plan does NOT "update" the lead. Users must still update the status of the lead according to the follow-up intervals set by their broker.
• Some leads may have action plans applied to them "automatically" by the company administrator or broker. This frequently occurs once a lead has been returned to the broker as "dead" or "bogus."

Action Plans

To create a plan you must first create your components. There are 3 types of Action Plan tasks: Automated Emails, Calendar Events, and Local Print tasks.



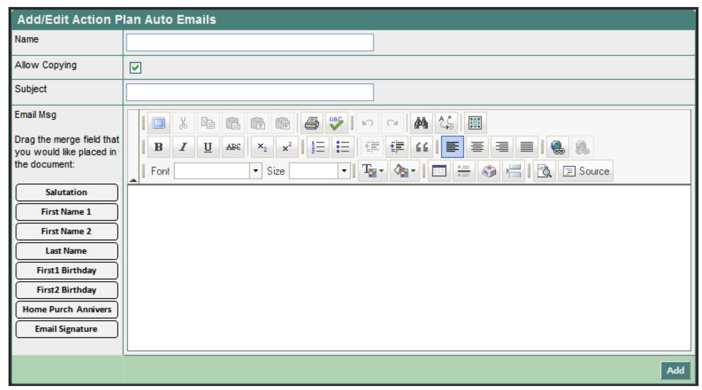
Auto Email messages can be automatically sent by the system. To create an Auto Email:

- **Email template** must be created
- Auto email is then **attached to a "plan"**

* Action plans may have **one or multiple** Auto Email components

Step 1 - Create Auto Email Template

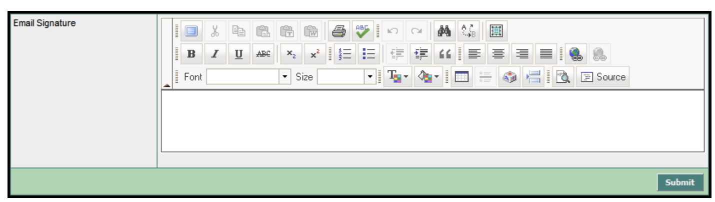
1. Go to Setup>>Action Plan Settings>>Action Plan Auto Emails
2. Create a name for the template (ex: '*Thank You for contacting me*' or Still thinking of Real Estate' *Emails*)
3. Allow Copying is selected by default (see page)
4. Type in the Subject line
5. Type email message
6. **Merge fields** can be used to include data from the lead. Click and drag the merge field (on the left) onto your template. The field will then be inserted in body of email message
6. Click **Add**



* For instruction on HTML Editor, see pgs. 12-13

*Once the Auto Email message is created, it is automatically added onto your list of components. The "component" is what is later added into an action plan.

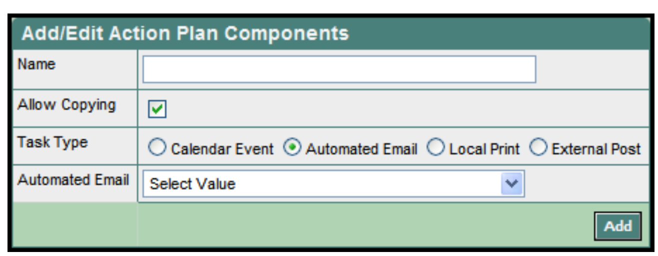
* Signature is created in My Profile page (Setup > My Profile)



* Add images onto your signature easily! For more information see page 9.

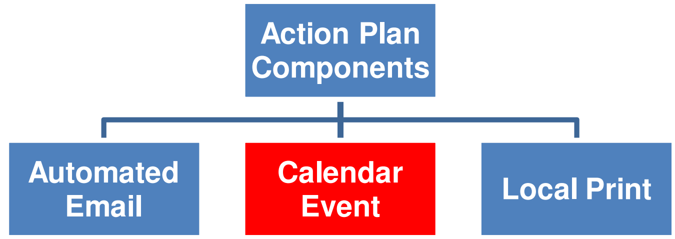
Step 2 – Edit Auto Email Component

1. Go to Setup>>Action Plan Settings>>Action Plan Components
2. Name the component (usually same as email)
3. Check Active
4. Select Task type for this component – *Automated Email*
5. Select the email template from drop down list
6. Select Add to save any changes



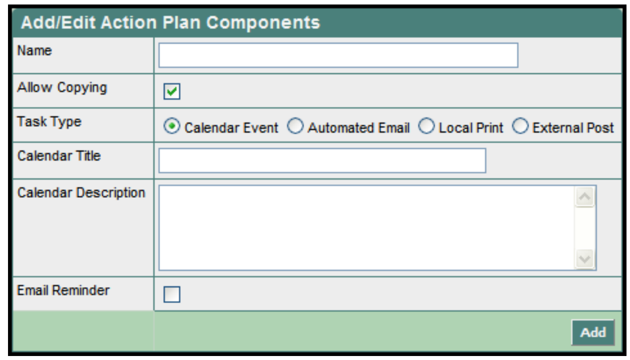
* Email templates created will be saved and can be used in other Action Plans.

Calendar Events (Component)
Calendar events are activities that are automatically added to the user's calendar in LeadRouter.



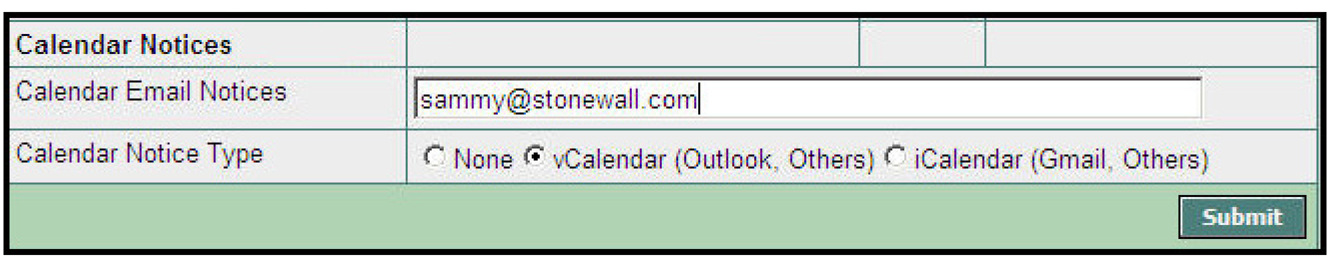
To Create a Calendar Event:

1. Select Setup>>Action Plan Settings >>Action Plan Components
2. Select Task Type: Calendar Event
3. Name the Calendar Event
4. Allow Copying is selected by default (see page)
5. Enter in an event description (optional)
6. Check Email Reminder to receive email that the event is scheduled
7. Click Add

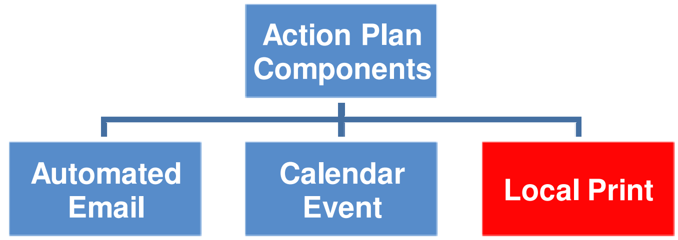


* The calendar event is automatically added to the Internal LeadRouter Calendar on the home page. **The event must be marked as "Completed" or it will continue to move forward in the LeadRouter Calendar.**

Special Feature: If users would like to link calendar events to an external calendar, they must identify the email address the type of calendar in their **My Profile** page, located under the Setup menu as seen below:

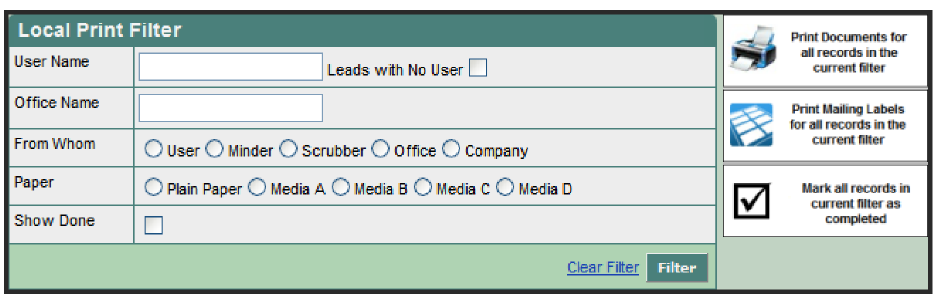


Local Print (Component)
Local Print documents allow users to create mailings (i.e. letters, mailing labels, newsletters, flyers) in an HTML editor (similar to the email editor) and add them to action plans. Once the action plan is appended the mailing is sent to the Local Print Queue for printing.

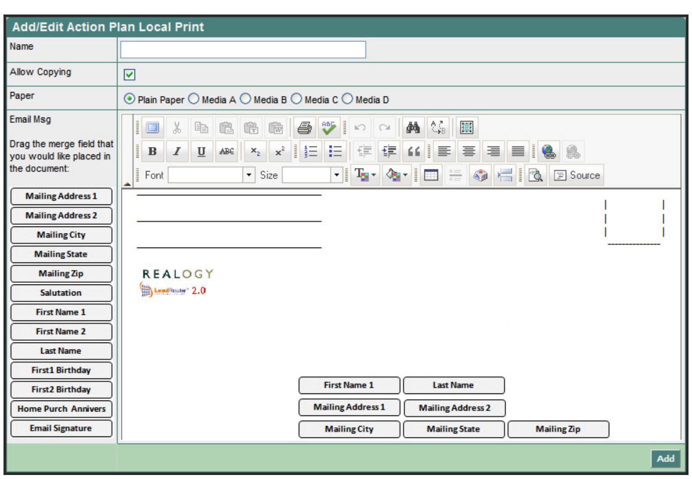


To Create a Local Print document:

1. Select Setup>>Action Plan Settings >>Action Plan Local Print
2. Name the Local Print task
3. Allow Copying is selected by default (see page)
4. Choose the Media Type (defined by your company)
5. Create document in editor (merge fields and image gallery functions are optional)
6. Click Add to create



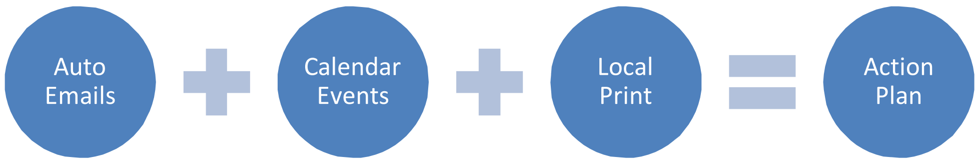
The user selects from one of 5 choices to indicate what print media should be loaded into the printer prior to sending the documents to the printer. The Media Type choices are Plain Paper, Media A, Media B, Media C, and Media D (media type defined by your company). For example, Media A might be the company letterhead, while Media B might refer to a just listed flyer form.



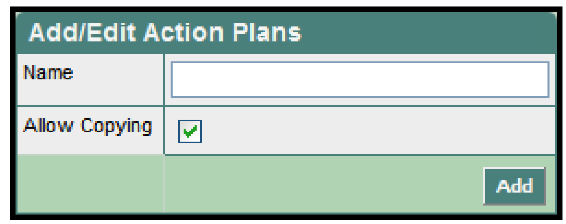
* Once the Local Print document is created and added to a plan it will be sent over to the Local Print Queue (*Today > Local Print Queue*) once the action task is completed. Using the Local Print Filter, jobs can be filtered so that all print jobs due for the various media types can be run in batches.

Creating Action Plans

An action plan is a “series” of Components that can be assigned to a lead “at once.” Users can create unlimited action plans, and each plan can have an unlimited number of “components” in it.



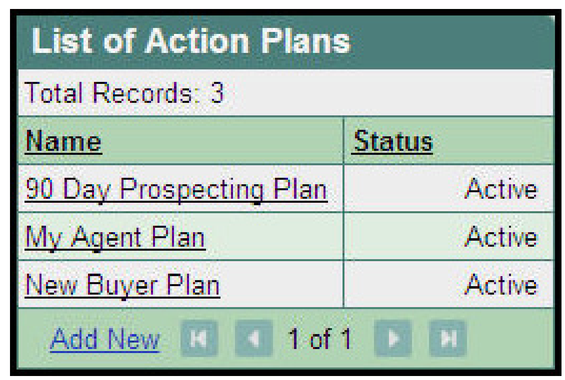
To Create an Action Plan



1. Select Setup>> Action Plan Settings>> Action Plans
2. Name your Plan
3. Allow Copying is selected by default (see pg.)
4. Select Active
5. Click Add

   * Created Action Plans are stored and easily accessible.

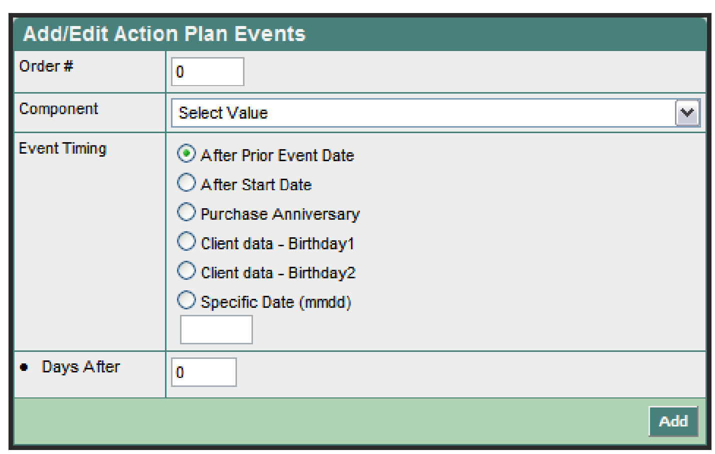
   * Keep track of assigned Action Plans by using your **Action Plan Activity** window under the Leads Menu!

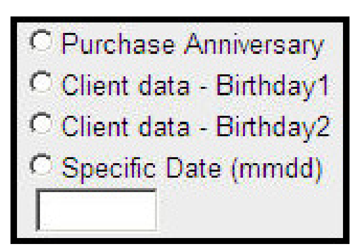


To Add/Edit Action Plan Components (Events)

1. Select Action Plan from the list
2. Any Components previously created will be included in the Component drop down list.
3. Each time you add an event/component it will be available for use in future plans
4. Select Component from the drop down
5. Add Event Timing
6. If you select “After Prior Event Date” or “After Start Date” you MUST enter the Days After number. This sets the specific timing for the events to trigger.
7. Select Add
8. Repeat process for the events you wish to include in your Action Plan series.

   * Certain event/components require data to be entered under the Additional Prospect Information tab (see page 9)





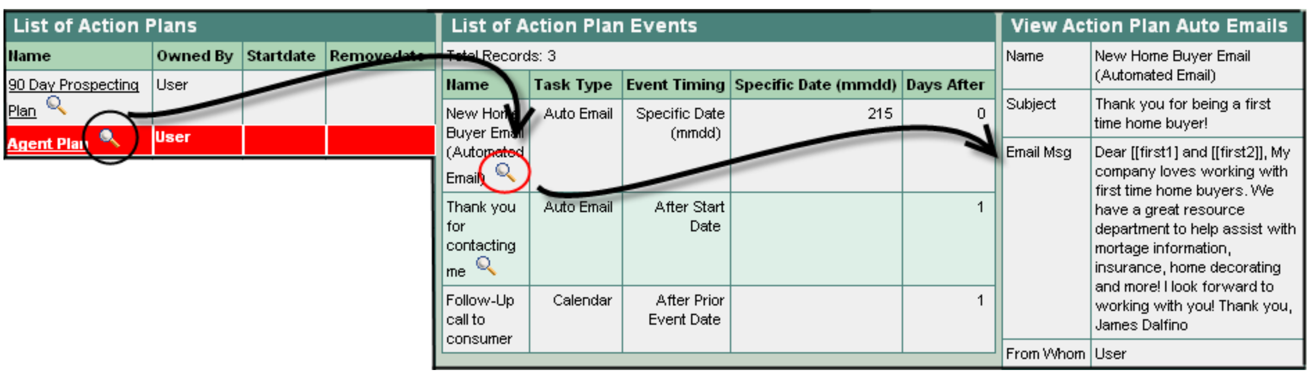
Assigning Action Plan to a Lead
Once you have created Action Plans (or using your company/Brand provided plans) you can apply the plan to leads from your "My Leads" table.

Select a lead and apply an action plan by following these steps:

1. Leads >> MyLeads
2. Click on Lead Name
3. Scroll down to Leadview Tabs

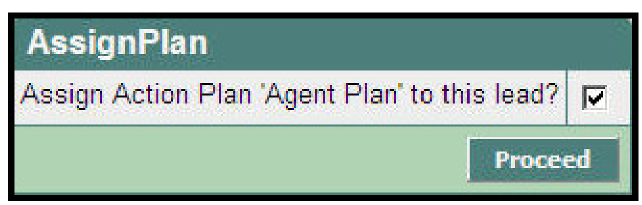
4. Select Action Plans tab
5. Click on Action Plan to assign

(select the  to preview plan)

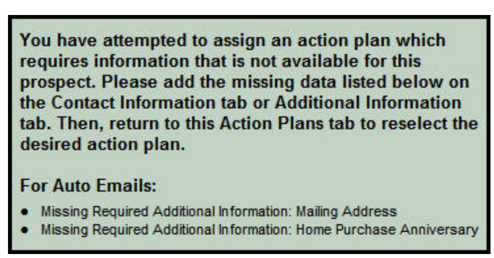


6. Checkbox to assign lead
7. Click Proceed

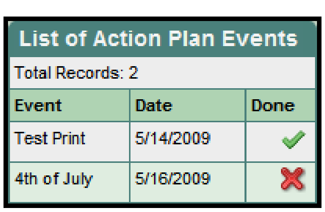
* Users may assign multiple action plans to a lead.



* An error message will appear if required data in specific fields are missing



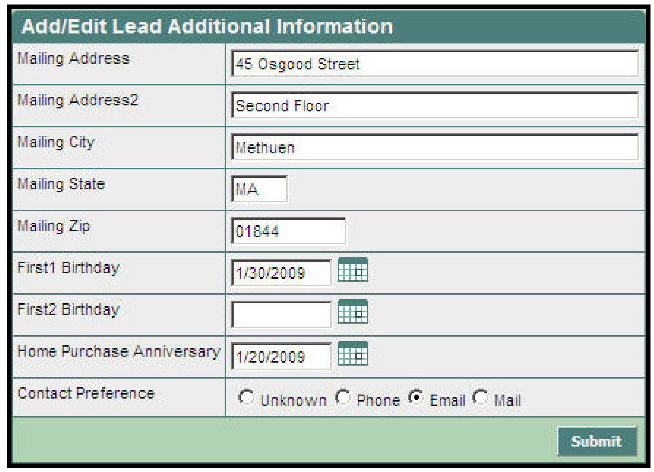
To view progress of an Action Plan, click its name in the lead's tab.



New tab in Lead View for **Additional Prospect Information**

As noted, some automatic activities require specific information in order to be processed and completed (especially key dates). Users can update this information using the “Additional Information” tab on each lead.

Add or edit additional contact information on this screen and click **SUBMIT** to save.

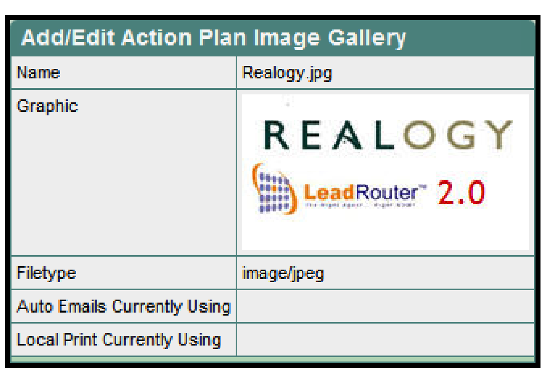


LeadRouter Image Gallery (Setup > Action Plan Settings > Action Plan Image Gallery)

Users can upload and store images to be used in signature and e-mails.

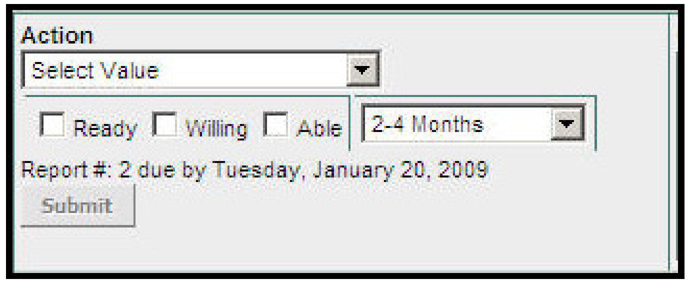
1. Select Browse to search for image
2. Select Upload File

* Once uploaded image will appear. To remove unwanted image select the “Delete” button.



Lead Scoring

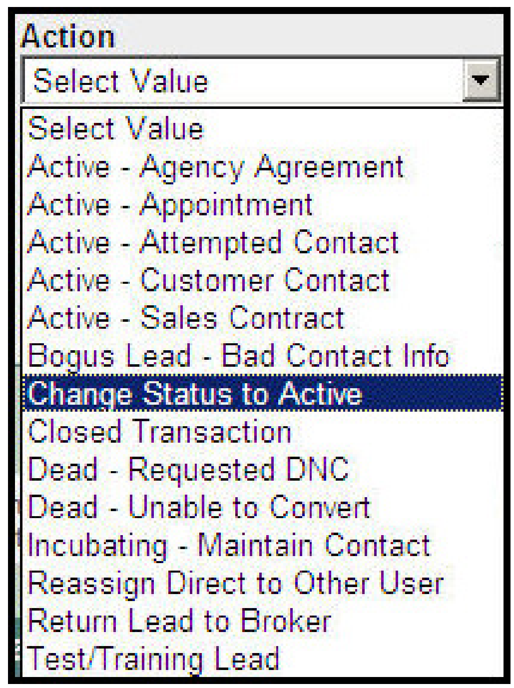
Lead Scoring allows for quick assessment of a customer's potential status.



Select Ready, Willing, Able
Use categories to "score" or prioritize the lead based on your estimate of their current cycle of real estate interest.

Time Frame:
Update the lead's "time frame" for a real estate transaction. This will help create chronological pipelines of prospects.

Updating Lead
New Action Status

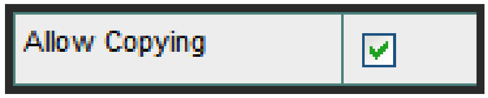


Currently, selecting **Incubating in the Action list** moves the lead to the Incubating table. Users continue to maintain and update leads on a periodic cycle.

Users are now permitted to **move the lead back** to Active status once the prospect has entered a more active stage of business (ie., appointments, contracts, etc). Once a lead is moved back to Active, the user continues to update the lead using the various "Active" types.

Allow Copying:

• Allow Copying provides the ability for users at all levels to copy permitted action plans, and all underlying components, auto emails, and local print documents. Only items identified by their owners with an "Allow Copying" checkmark are available for copying.



• An action plan that is marked by its owner to "Allow Copying" will copy all of the underlying items, regardless of the copy rights for those individual items.

• The add/edit dialog for all action plans, components, auto emails, local print, and external post items has been modified to show an "Allow Copying" checkbox. By default, this is checked. If selected that item is available for copying by other users. The dialog box for Action Plans is shown below; the Components, Auto Emails, and Local Print have a similar enhancement.

List of Action Plans

Total Records: 28

Name	Action	Status	Owned By
Buyer test plan	(copy)	Active	Company
Buyer test plan (copied 05-14 08:40)	(copy)	Active	Company

Once copying is allowed by owner, a user selects "copy" and the copied item is added. A timestamp is then displayed to distinguish the original from the copy.

HTML Editor

Maximizes the editor size inside the browser.

Cut the highlighted text to the clipboard.

Copy the highlighted text to the clipboard.

Paste the data copied to the clipboard (with or without formatting).

Paste content copied from Microsoft Word or similar applications.

Print the current document.

Spell check the text in the document.

Undo or redo the most recent action taken.

Find a word or phrase within the document.

Find and replace a word or phrase within the document.

Select the entire text in the document.

Applies **bold**, *italic*, <u>underscore</u> or ~~strikethrough~~ formatting to the highlighted text.

Superscript or subscript the highlighted text.

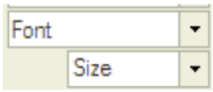
Creates numbered or bulleted lists.

Increase or decrease the text indentation.

Format a block of text to identify quotations

Sets the text alignment (left, centered, right or justified).

Converts or removes the text in hyperlinks. It may also by used to manage file uploads and links to files on the web server.



You may use the drop down boxes to set the font and its size.

Changes the color of the text.

Changes the background color of the text.

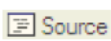
Creates a table with the defined number of columns and rows.

Inserts a divider line (horizontal rule).

Inserts symbols & special characters (accented characters, trademark, currency symbol, etc.).

Inserts a printing page break. Only impacts printed version.

Shows where the block elements boundaries in the text.



View or edit the document source code (for advanced users).

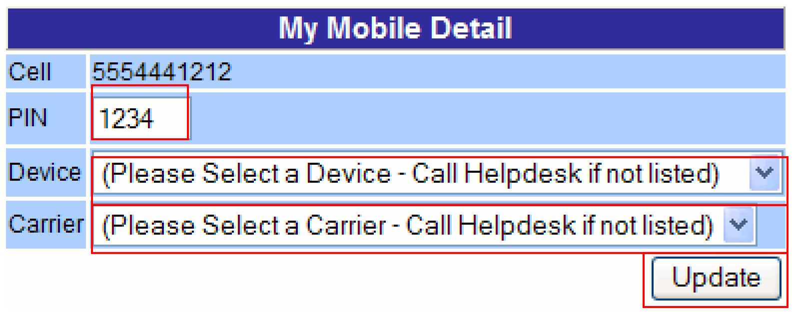
1. Setup Instructions for LeadRouter Mobile

a. Click on the "My Mobile LeadRouter Profile" link
(You will be directed to your "My Mobile Detail")

b. Select a 4 digit **PIN Number** (*e.g. 1234 or last 4 digits of cell phone number)*

c. Enter **Device Make and Model** *(e.g. Blackberry 8703e)*

d. Enter **Carrier** *(e.g. Verizon)* then click Update



(Once you have completed setup, below are the instructions on how to access LeadRouter Mobile from your mobile device.)

2. Login Instructions to Accessing LeadRouter Mobile

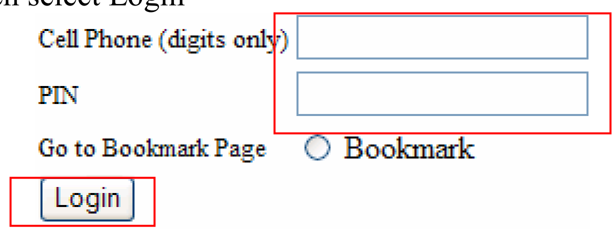
a. Open a web/internet browser on your mobile device
(Refer to your user manual for your mobile device on accessing web/internet browser)

b. Enter the following URL in the address bar

http://***m.leadrouter.com***

(You will be directed to the LeadRouter Mobile Login Screen)

c. Enter **Cell Phone Number** (digits only e.g. 2012345678) and **4 Digit PIN Number** then select Login



By Checking on Bookmark, m.leadrouter.com will be added and saved to your bookmarks/favorites on your mobile device.

Please note Blackberry Mobile devices might need configuration for the best optimization for viewing. Refer to the Online "Help" for configuration instructions.