RE/MAX LeadStreet Lead Management Guide

Ver. 1.0

Revision History

Name	***Date***	***Version***	***Description***
Tamika Anglin	*09/04/13*	*1.0*	*Initial Creation*

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What is a lead?
A lead is an internet inquiry which is assigned to an agent as a prospect. These types of inquiries are from prospective clients who could become potential buyers.

Lead Types

- Sign up (account creation)
- Contact Us Request
- Property Inquiry
- Schedule a Showing

Lead Sources

- Agent's LeadStreet website
- Office LeadStreet website
- Remax.ca (agent's profile page with listings)
- Remax.ca (General property search)
- Global.remax.com
- RE/MAX Western Mobile App
- Homes.com
- Homes.com Mobile App

Lead Handling

- Leads from agent's website – assigned to the agent; agent does not need to accept or decline this lead type
- Contact us requests - assigned to the agent; agent does not need to accept or decline this lead type
- All other leads (schedule a showing, property inquiry and sign up) are ***offered*** to the agent who must accept or decline it

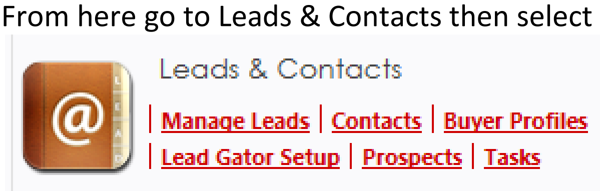
Accepting or declining a lead

- From the email notification, note the type of lead, which will determine whether or not you will need to accept/decline it or if it is automatically assigned to you.

- To accept/decline a lead via email:
  - To accept, reply to the notification email then press send.
    NB: Do not type any comments or modify the subject in any way.
  - To decline, select reply and change the email subject to DECLINE then press send.

- To accept/decline a lead via HomesConnect:
  - Sign on to LeadStreet via MainStreet
    - Go to www.remax.net and input your credentials
    - Under QuickLinks, select MyLeads
    - You are now taken to LeadStreet where you may or may not be presented with a start-up checklist (determined by your individual setting)
    - At the top left hand section of the screen, select the white drop down arrow next to the red HomesConnect button (My Applications)

    - From here go to Leads & Contacts then select Manage Leads



    - You will be taken to the Manage Leads page which is segmented into the following sections:
      - Pending leads – Leads which are waiting to be accepted
      - Lead Gator Leads – Leads sent to you via your Lead gator email address (to be discussed in another document)
      - Priority Leads – Leads which are accepted and depending on the client's activities, groups them for your attention.
      - Active Leads – Leads which have been accepted and are actively being pursued by you

- To accept/decline a pending lead from Pending Leads:
    - At the end of the line next to the lead details, select the drop down arrow next to Select an Action and choose Accept/Decline

- An accepted lead is moved to the Active leads section of the said screen. You may need to refresh your browser (press F5 on your keyboard) to see this.

- A declined lead is placed back into the pool and is sent out to another agent in the office

- Once the lead is accepted and is now under Active Leads or Priority Leads, you can view the contents of the lead as follows:
    - Select the arrow next to the lead and choose Edit
    - You are then taken to the actual lead which is now added as a contact in HomesConnect
    - At the top of the screen under the Edit Contact bar, you will be presented with as much contact information as supplied by the client:
        - Name
        - Email Address
        - Contact number
    - Scroll to the Form Messages section of this page to note any messages typed by the client stating what information is needed.
    - Scroll to the Listings tab at the top of the page, below the supplied contact details of the client

    - If the lead was generated from a listing on any of the lead sources, the listing for which the client is interested will be evident in this section
    - Click on the property address to be taken to the site and property the lead was generated on

- Now that you have accepted the lead, make contact with your new contact providing them with any requested information.

Lead Management FAQ's

1. **How can I get more leads?**

   To maximize on your lead potential here are a few tips you could use:
   a. Import your contacts from your social media (LinkedIn, Twitter, FaceBook, etc) into LeadSteet
   b. Import any contacts (families and friends, etc) into LeadSteet
   c. Customize your website
   d. Ensure LeadStreet profile is complete
   e. Promote your website

2. **Why do I get leads on non-RE/MAX listings?**

   With the IDX reciprocity agreement in place between the Real Estate Boards, members will have the benefit of showing such listings on their websites.

3. **I got a lead notification and now I cannot accept the lead; it says the lead is no longer available. Where did my lead go?**

   Every RE/MAX office is configured by its brokers to handle leads in a different way. The broker has the ability to determine:
   a. The number of agents or the specific agent a lead is sent out to at any given time
   b. How long a lead stays with an agent before expiring - Once a lead expires:
      i. Lead generated on your listing - the lead is passed to another agent in your office
      ii. Lead generated on a non-RE/MAX listing – the agent will be taken out of the pool until all other agents have received a lead, at which point the pool resets. If the agent actively declines the lead, that agent remains in the pool and is eligible for another random lead.
   c. The number of expirations of the said lead before it is passed back to the broker for manual assignment

4. **Is my LeadStreet working?**

   You can test LeadStreet by finding your listings on any of the lead sources mentioned earlier and generating a false lead to determine if it is sent to you. Please note this will not affect your lead pool position.
   NB: Use a phony email address, which must be in the normal email format (e.g. name@domain.com)