BoldTrail PRO

Laws of the Pipeline

Follow these essential practices to be successful with your platform!

1. New leads should only linger in this status for up to 30 days. If engaged, they should be moved to Active. They should be moved to Prospect if they have yet to be responsive at the 30-day mark.

2. Leads in **NEW** must be put through a 30-day qualification plan. Leads should not be switched to Active until they have engaged with you

3. Leads in NEW that have been through the qualification plan, but have not responded will be put in **PROSPECT.**

4. Any lead that tells you they have no interest in buying/selling should be moved to **PROSPECT** immediately.

5. Any lead moved to **ARCHIVE** must have a note that explains why it was moved to **ARCHIVE.**

6. All leads with a valid email address should be placed on a Search Alert and a Market Report.

7. **All ACTIVE** leads should be started on a Smart Campaign fitting for their needs/situation.

8. **All ACTIVE** leads should have to-do's set at all times.

9. To-do's must be completed on the day they were assigned.

10. Hashtag should be applied when an appointment has been set **(ie. #HOT or #AppointmentSet).**

11. Lead will be changed to **CLOSED** once the client closes on the house.

12. All calls/texts/ emails must be logged in your CRM. Email, call, and text through your system as much as possible.

13. Look at Archive leads weekly and sort by last visit to see if outreach is needed.

14. Check your **Dashboard** daily!