

LeadRouter 3.0 Agent Incubation Tools Guide

Table of Contents	
LeadRouter Incubation Tools Overview	3-4
Action Plans - Create Component - Automated Email	5
Action Plans - Create Component - Calendar Event	6
Action Plans - Create Component - Local Print	7
Creating Action Plans - Name, Add/Edit Plan Components	8
Assigning Action Plan to Lead	9
Additional Prospect Information, Image Gallery	10
LeadScoring, New Action Status	11
Allow Copying Function	12
HTML Editor	13-14

LeadRouter – Incubation Tools

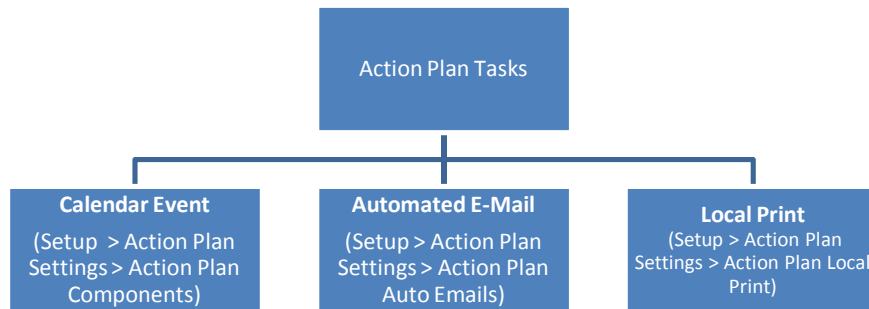
Your LeadRouter account includes automated tools to help you create a systematic approach to incubate your leads. LeadRouter lets agents, company administrators and your brand create “action plans” that can “drip market” to prospects over any period of time.

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

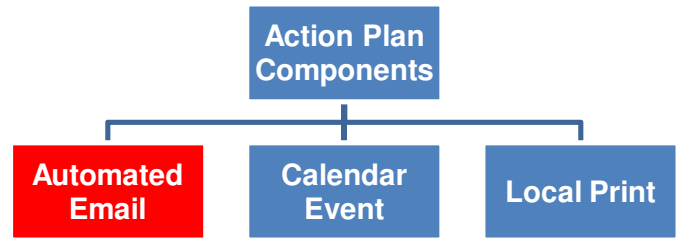
1. Go to Setup>>Action Plan Settings>>Action Plan Auto Emails
2. Create a name for the template (ex: ‘Thank You for contacting me’ or Still thinking of Real Estate’ Emails)
3. Allow Copying is selected by default (see page)
4. Type in the Subject line
5. Type email message
6. **Merge fields** can be 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**

*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)

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



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

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

* 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

Add/Edit Action Plan Components	
Name	<input type="text"/>
Allow Copying	<input checked="" type="checkbox"/>
Task Type	<input checked="" type="radio"/> Calendar Event <input type="radio"/> Automated Email <input type="radio"/> Local Print <input type="radio"/> External Post
Calendar Title	<input type="text"/>
Calendar Description	<input type="text"/>
Email Reminder	<input type="checkbox"/>
<input type="button" value="Add"/>	

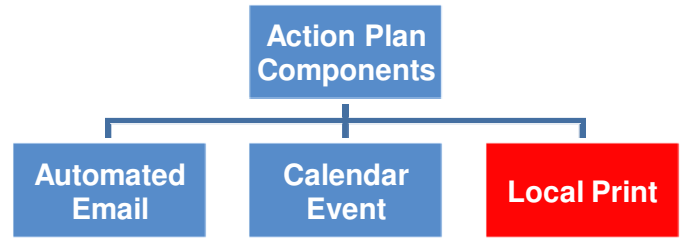
* The calendar event is automatically added to the Internal LeadRouter Calendar on the home page. **The event must be marked as “Completed” or it will continue to move forward in the LeadRouter Calendar.**

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:

Calendar Notices	
Calendar Email Notices	<input type="text" value="sammy@stonewall.com"/>
Calendar Notice Type	<input type="radio"/> None <input checked="" type="radio"/> vCalendar (Outlook, Others) <input type="radio"/> iCalendar (Gmail, Others)
<input type="button" value="Submit"/>	

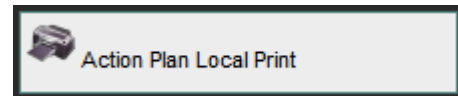
Local Print (Component)

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



Local Print Filter	
User Name	<input type="text"/> Leads with No User <input type="checkbox"/>
Office Name	<input type="text"/>
From Whom	<input type="radio"/> User <input type="radio"/> Minder <input type="radio"/> Scrubber <input type="radio"/> Office <input type="radio"/> Company
Paper	<input type="radio"/> Plain Paper <input type="radio"/> Media A <input type="radio"/> Media B <input type="radio"/> Media C <input type="radio"/> Media D
Show Done	<input type="checkbox"/>
Clear Filter <input type="button" value="Filter"/>	

Print Documents for all records in the current filter

 Print Mailing Labels for all records in the current filter

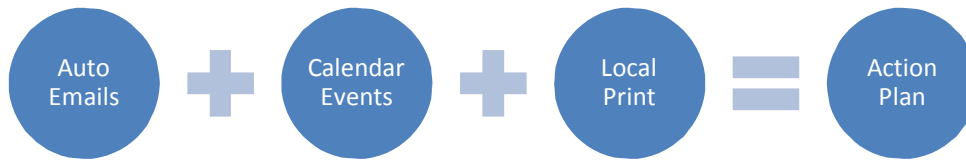
 Mark all records in current filter as completed

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!

The screenshot shows the 'Add/Edit Action Plans' form. It has a title bar 'Add/Edit Action Plans'. Below the title bar, there is a 'Name' field with an empty text box. Below that is a row with 'Allow Copying' and a checked checkbox. At the bottom right of the form is an 'Add' button.

The screenshot shows the 'List of Action Plans' table. The title bar says 'List of Action Plans'. Below the title bar, it says 'Total Records: 3'. The table has two columns: 'Name' and 'Status'. The rows are:

Name	Status
90 Day Prospecting Plan	Active
My Agent Plan	Active
New Buyer Plan	Active

At the bottom of the table, there is a navigation bar with 'Add New', navigation arrows, and '1 of 1'.

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)

The screenshot shows the 'Add/Edit Action Plan Events' form. It has a title bar 'Add/Edit Action Plan Events'. Below the title bar, there is an 'Order #' field with the value '0'. Below that is a 'Component' dropdown menu with 'Select Value' selected. Below that is the 'Event Timing' section with several radio button options: 'After Prior Event Date' (selected), 'After Start Date', 'Purchase Anniversary', 'Client data - Birthday1', 'Client data - Birthday2', and 'Specific Date (mmdd)'. Below the radio buttons is an empty text box. At the bottom left, there is a 'Days After' field with the value '0'. At the bottom right is an 'Add' button.

This is a close-up screenshot of the 'Event Timing' section from the previous form. It shows the following radio button options:

- Purchase Anniversary
- Client data - Birthday1
- Client data - Birthday2
- Specific Date (mmdd)

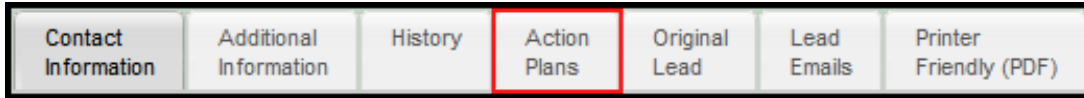
Below these options is an empty text box.

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)

List of Action Plans				List of Action Plan Events					View Action Plan Auto Emails	
Name	Owned By	Startdate	Removedate	Total Records: 3					Name	New Home Buyer Email (Automated Email)
90 Day Prospecting Plan	User			Name	Task Type	Event Timing	Specific Date (mmdd)	Days After	Subject	Thank you for being a first time home buyer!
Agent Plan	User			New Home Buyer Email (Automated Email)	Auto Email	Specific Date (mmdd)	215	0	Email Msg	Dear [[first1]] and [[first2]], My company loves working with first time home buyers. We have a great resource department to help assist with mortgage information, insurance, home decorating and more! I look forward to working with you! Thank you, James Dalfino
				Thank you for contacting me	Auto Email	After Start Date		1	From Whom	User
				Follow-Up call to consumer	Calendar	After Prior Event Date		1		

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

AssignPlan

Assign Action Plan 'Agent Plan' to this lead?

Proceed

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

List of Action Plan Events		
Total Records: 2		
Event	Date	Done
Test Print	5/14/2009	✓
4th of July	5/16/2009	✗

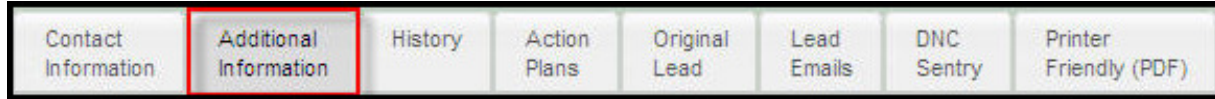
You have attempted to assign an action plan which requires information that is not available for this prospect. Please add the missing data listed below on the Contact Information tab or Additional Information tab. Then, return to this Action Plans tab to reselect the desired action plan.

For Auto Emails:

- Missing Required Additional Information: Mailing Address
- Missing Required Additional Information: Home Purchase Anniversary

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.

Add/Edit Lead Additional Information	
Mailing Address	45 Osgood Street
Mailing Address2	Second Floor
Mailing City	Methuen
Mailing State	MA
Mailing Zip	01844
First1 Birthday	1/30/2009
First2 Birthday	<input type="text"/>
Home Purchase Anniversary	1/20/2009
Contact Preference	<input type="radio"/> Unknown <input type="radio"/> Phone <input checked="" type="radio"/> Email <input type="radio"/> Mail
<input type="button" value="Submit"/>	

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

Choose a NEW image to upload:

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

Add/Edit Action Plan Image Gallery	
Name	Realogy.jpg
Graphic	
Filetype	image/jpeg
Auto Emails Currently Using	
Local Print Currently Using	

Lead Scoring

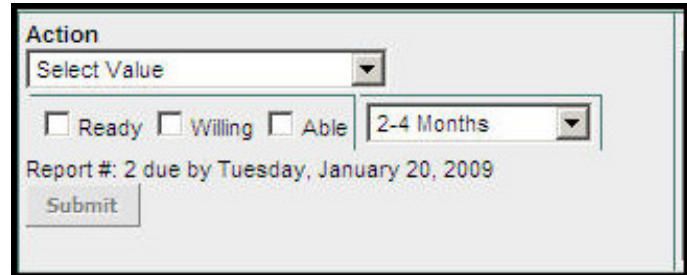
Lead Scoring allows for quick assessment of a customer's potential status.

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.

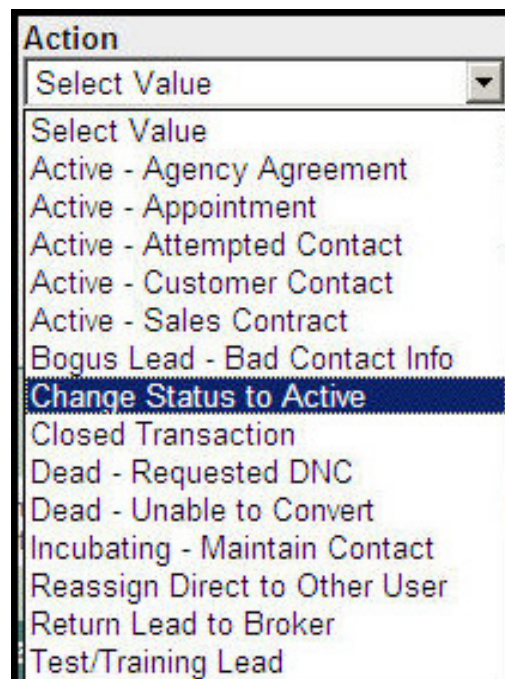


The screenshot shows a web form titled "Action". At the top is a dropdown menu labeled "Select Value". Below it are three checkboxes: "Ready", "Willing", and "Able". To the right of these checkboxes is another dropdown menu showing "2-4 Months". Below these elements is a text field labeled "Report #: 2 due by Tuesday, January 20, 2009". At the bottom left is a "Submit" button.

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.

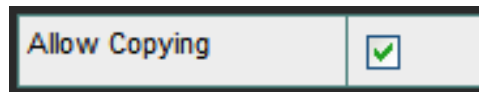
Users are now permitted to **move the lead back** to Active status once the prospect has entered a more active stage of business (ie., appointments, contracts, etc). Once a lead is moved back to Active, the user continues to update the lead using the various "Active" types.



The screenshot shows a dropdown menu titled "Action". The menu is open, displaying a list of options. The options are: "Select Value", "Active - Agency Agreement", "Active - Appointment", "Active - Attempted Contact", "Active - Customer Contact", "Active - Sales Contract", "Bogus Lead - Bad Contact Info", "Change Status to Active" (highlighted in blue), "Closed Transaction", "Dead - Requested DNC", "Dead - Unable to Convert", "Incubating - Maintain Contact", "Reassign Direct to Other User", "Return Lead to Broker", and "Test/Training Lead".

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.


B *I* U ~~ABC~~ Applies **bold**, *italic*, underline or ~~strikethrough~~ formatting to the highlighted text.



_{x₂} ^{x²} 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 be 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.

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