

GOOD VIBE SQUAD'S **UNFAIR ADVANTAGE™** REALTOR PARTNER PIPELINE **AUTOMATION CHEAT SHEET**

The Realtor Partner Attraction Pipeline helps to connect you with prospective Realtor Partners that you want to add to your referral network!

We want you to hold all the leverage when it comes to choosing who you partner with.

For this reason, we have training on where to best source these prospective real estate agents, but we do not generate these leads for you.

You'll need to import new Realtor Leads into the system in order for them to enter the Realtor Partner Attraction Pipeline.

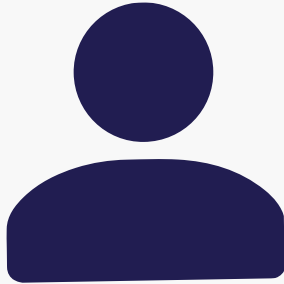
The pipeline takes Realtors as New Potential Partners ("Realtor - New Leads" Stage) and automatically messages them with a value proposition.

These automated messages entice them to schedule a call with you, so that you can get in contact with them and ultimately create a new relationship with a Realtor Referral Partner ("Realtor - Partner Success" Stage).



01 REALTOR - NEW LEADS

HOW DOES THE LEAD ENTER THIS STAGE? **Manual (You Import Lead)**
DOES THIS STAGE SEND AUTOMATED MESSAGES? **Yes**



- This stage is where Realtor Leads first enter your pipeline.
- When choosing Realtors you'd like to partner with, you want Realtors who:
 - Have high enough production to be able to send you referrals
 - Are trustworthy (share your values, have good business ethics)
- Once you find a Realtor that you'd like to work with, add their Name, Phone Number, and Email to the system.
- When you add a Realtor Lead into the system, this triggers the system to automatically send these Realtors the "New Leads" follow ups.

The "New Leads" follow ups include customized voicemails, texts and emails. These follow ups are designed to get the Realtor engaged in a conversation & schedule a call with you.

02 REALTOR - IN CONTACT

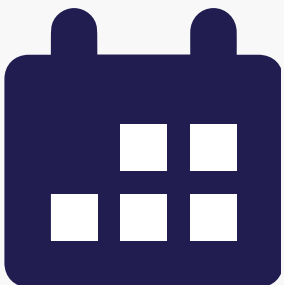
HOW DOES THE LEAD ENTER THIS STAGE? **Automatic (System Moves Lead)**
DOES THIS STAGE SEND AUTOMATED MESSAGES? **No**



- When a Realtor reaches out to you (either through text, email, or calling your LoanMore CRM phone number) that system automatically puts that Realtor into "In Contact"
- In this stage, the Realtors are not getting follow ups. Instead, these Realtors are waiting for your response, so it's up to you to keep in touch with them.

03 REALTOR - BOOKED APPOINTMENT

HOW DOES THE LEAD ENTER THIS STAGE? **Automatic (System Moves Lead)**
DOES THIS STAGE SEND AUTOMATED MESSAGES? **Yes**



- Once a Realtor books an appointment with you, this triggers the system to automatically move them into "Booked Appointment."
- The system will automatically send reminders to the Realtor about the upcoming appointment.
- The Booked Appointment will also sync to your calendar. Calendar syncing is important for 2 reasons:
 1. Once a Booked Appointment is synced to your calendar, LoanMore CRM will send you reminders to show up on your scheduled appointment.
 2. Syncing these Booked Appointments to your calendar ensures that you're never double booked.

04

REALTOR - NO SHOW

HOW DOES THE LEAD ENTER THIS STAGE? Manual (You Move Lead)

DOES THIS STAGE SEND AUTOMATED MESSAGES? Yes



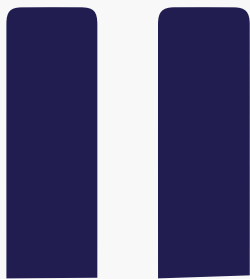
- If a Realtor does not show up to their booked appointment, move them into “No Show.”
- Once you move a Realtor into “No Show,” the system will follow up with that Realtor to get them to reschedule.

05

REALTOR - HOLDING

HOW DOES THE LEAD ENTER THIS STAGE? Manual (You Move Lead)

DOES THIS STAGE SEND AUTOMATED MESSAGES? No



- If you do not want a Realtor to receive any automations, move them into “Holding.”
- Once Realtors enter the “Holding” stage, this stops any automations from being sent out.

06

REALTOR - PARTNER SUCCESS

HOW DOES THE LEAD ENTER THIS STAGE? Manual (You Move Lead)

DOES THIS STAGE SEND AUTOMATED MESSAGES? No



- When a lead is moved into this stage, it automatically adds that realtor to the pipeline “4 - Realtor Partners Pipeline” under “Active Partners
- This stage is for Realtor Partners that have been added to your referral network!
- Congratulations on boosting your Realtor Partnerships so you can add more referral business to your loan production!
- Once in this stage, the system will track how many referrals these Realtors are sending you.