Welcome Agent Training
On-Boarding Packet

A NEW Lead Management Model

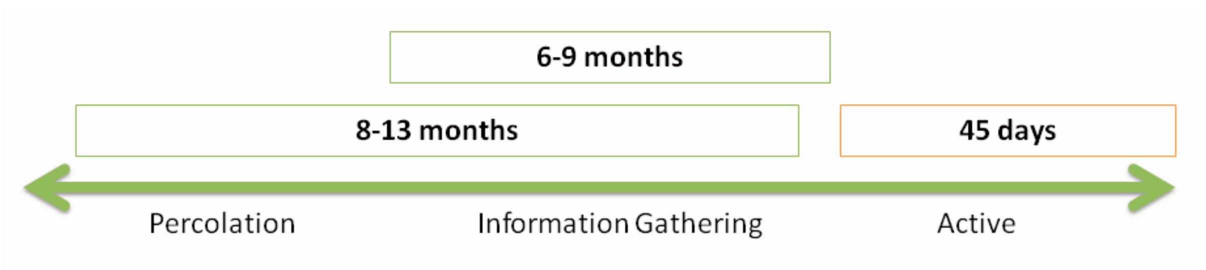
- We are the industry authority lead capture with 30 + years.
- We have designed a structure, a strategy and a plan with our “New Lead Management Model."
- It is proprietary and currently exclusive to our solution.

Current Lead Management Conditions

Quantum Management Systems has conducted tracking studies of lead capture since 1978.

- The studies have tracked inbound ad calls, internet leads and various other sources.
- The lead generating source did not matter and the capture rate remained the same.
- Recently conducted a tracking study on density of Lead Generation population.
- Quantum established that the number of actual leads converted from 10,000 leads in the study was 82% over a 9 to 15 month period.

Term of the Buyer's Cycle



1. ***Active Phase* - *defined as the period in which the buyer is making a final buying decision, i.e. write a check, or sign a contract.***

2. Information Gathering Phase - defined as a period during which the buyer is doing due-diligence, researching and developing an information base from which to make an informed decision.

3. ***Percolation Phase* - *defined as the earliest stage of thinking or feeling a relatively distant need or desire to buy a product.***

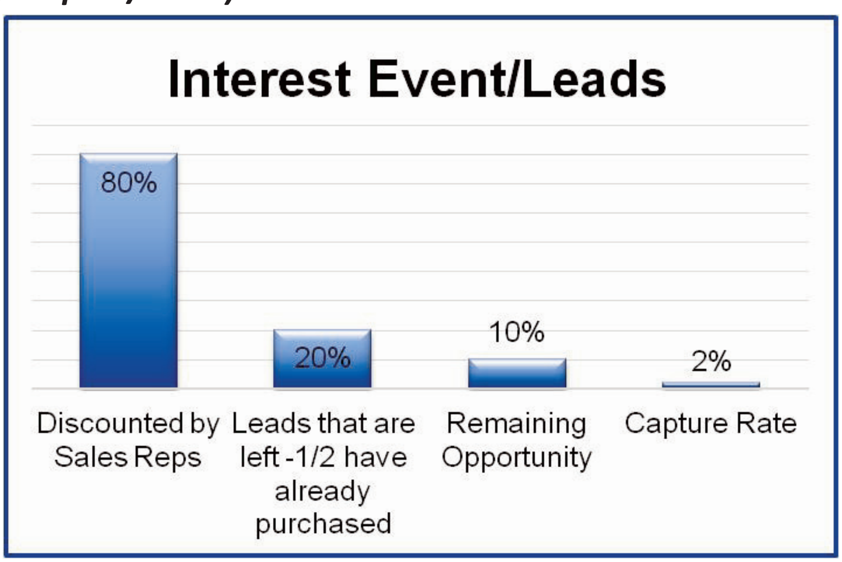
Leads are the heart of all business development.

Lead capture has become a science as well as an art. It requires a sophisticated capture system with highly trained lead capture specialists.

There is a fundamental error regarding the assumption of what lead generation and capturing is. That assumption error lies in the general belief that an “Interest Event/Lead” is not a lead unless the prospect is prepared to act now or buy now. When they are not; the conclusion is that they are not interested, are just looking or not qualified. This assumption/belief occurs with 80% of most lead opportunities. This together with a lack of a developed language skill to capture-convert, causes significantly more potential leads to be lost than captured.

There is huge fundamental failure of competency in the Lead capture process. The cost of a lead and its ROI are the core determinants of any strategy to create a system for optimizing the entire “Interest Event/Lead” management process.

- ***80% of all “Interest Event/Leads are discounted by the sales rep***
- ***Half of what is left (20%) has already purchased leaving a 10% opportunity***
- ***Of that remaining 10% opportunity only 2 are captured (Or 2 out of 100 prospect/leads)***



Lead Conversion

- Lead Conversion
  - 48% of sales people never follow up with a prospect
  - 25% of sales people make a second contact and stop
  - 12% of sales people only make three contacts and stop
  - Only 10% of sales people make more than three contacts
  - 2% of sales are made on the first contact
  - 3% of sales are made on the second contact
  - 5% of sales are made on the third contact
  - 10% of sales are made on the fourth contact
  - 80% of sales are made on the fifth to twelfth contact

- Nothing happens without an appointment
- If a lead is contacted 1 hour later - Value drops 100 X
- State of the art technology, scripts & coaching generates Lead Capture in 5 minutes
- Conversion occurs: First contact & month 9 of engagement
- 80%+ of lead conversion occur after 5th-12th contact
- 80% of ALL leads must be contacted - 7x minimum

Lead Conversion

- In a recent study, over 80% of lead conversions occur AFTER the 5th to the 12th contact
- 80% of ALL Leads need to be contacted a minimum of 7 times
- 88% of Sales people stop trying to contact a lead after just three attempts
- Conversion materializes between the 1st contact and the 9th month of engagement
- NOTHING happens without an appointment! (Either face to face or by phone.)
- The earlier you respond to an “Interest Event/Lead” inquiry the more effective you are at capture
- If a consumer is contacted within 5 minutes after an Interest Event occurred, it was 7.8 times more likely to be captured; then at 30 minutes. An hour later it drops to being 100 times less effective.
- Current technology coupled with skill allows the opportunity to capture an “Interest Event/Lead” within 5 minute window of first contact.

How We Address The Problem

- Highly trained, managed & scripted Lead Capture Center
- Buying Cycle Phases
  - Percolation
  - Information Gathering
  - Active Incubation
- Incubation
  - WE Incubate, NOT nurture leads
  - Prospect gets nurtured in Incubation
- We deliver a higher ratio face-to-face appointment
  - Beyond All other models
- Moreover, we offer our proprietary solution, “Incubation”
  - Incubation Leads Require More
    - Time
    - Communications
    - Motivations
- Our Strategy;
  - “Help consumers without selling them anything


Lead Development Process
1. Collect
New lead email notification lands in our client CRM. Phone inquiries are routed directly into our Customer Care Center.
2. Contact
Our operator engages the lead within 5 minutes.
3. Capture
Operator captures an appointment when possible. If the lead isn't ready, lead Incubation begins.
Sales Flow
4. Strategize
Real Estate Agent meets the lead face-to-face, and develops customer satisfaction strategy.
4a. Calibrate
4b. Coach
Lead Connect 365 calibrates a buyer plan and timeline. We also coach on optimal lead engagement.
5. Contract
Agent captures lead and enters contract process.
If the Agent decides the lead is not ready for active engagement the lead is returned for incubation.
Incubation Flow
6. Incubate
Lead Connect 365 incubates lead for the Agent, using proprietary systems, technology, and communication.
Agent coaching and training
6a. Identify
6b. Update
6c. Notify
Identify the optimum incubation strategy for each lead.
Update Agent regarding communication with lead.
Notify the Agent of lead's readiness in buying cycle.
Go to Step 3
7. Mature and Active Return
Lead transitions into Active Phase and is ready to meet with the original Agent face-to-face. Lead Connect 365 makes appointment with lead prospect and Agent. Return to step 3.

Agent Training
Things You Should Know

Lead Capture Procedures

a) How are email leads handled?

LeadConnect365™ has deployed industry leading technology for state-of-the-art speed & quality of response to **Your** leads. During the on-boarding process **Your** email lead sources are setup so new opportunities are automatically loaded into our Inside Sales Department. Our technology will prioritize new leads for instant callback: we target a 5-minute response time but many factors inside and outside our control affect this outcome. There is no promise or representation by LeadConnect365™ that this timeframe will always be met. However, every effort will be made to do so.

We have state of the art dialing technology. When the phone rings at **Your** client's end, the Caller ID will display a local area code specific to the phone number the client dialed from. Each time the lead is contacted via phone the Caller ID will display that same local number.

Upon successful contact, our highly-trained Lead Capture Specialists (LCS) will engage the client as **Your** team member. We present ourselves as **Your** Executive Coordinator, calling on your behalf. Our scripts & call procedures are informed through 30 years of industry leading research. Calls are relentlessly monitored for quality and consistency to enable unparalleled Appointment Rates & Client Satisfaction.

If a lead is not successfully contacted, our LCS "Lead Capture Specialists" will continue to attempt contact with the lead via voicemails, texts and email, as dictated by our cadence procedures.

b). WHERE RELEVANT: How are phone leads (sign calls) handled?

Phone leads can be generated from signs posted on-line (**Your** website, a real estate portal, etc.) or off-line (yard signs).

With phone leads it is critical to maximize the probability that the phone call is responded to by a live representative. A dedicated number will be offered if **Your** company indicates, via the Setup Questionnaire, that there is a need to route phone leads into our Inside Sales Department.

To successfully route phone leads you must forward **Your** sign calls to the telephone number provided to you. You must also ensure no additional IVRs or messages are played to the client. When a call is captured via **Your** dedicated number, a new lead record is created to document the lead contact information.

2). Appointment procedures

a). Who handles all client facing communications up until the appointment?

All client interactions up-until the scheduled appointment time are handled by the LCS. We require strict adherence to this policy to make sure the client receives a consistent message & experience designed to maximize the probability of a face to face meeting.

LC365 will send a text to the appropriate agent group based on the lead inquiry. Here is an example of an appointment request via text to the agent group:

Buyer / Seller

Property Inquiry: 176 Park Place, Your Town, Zip Code

Price: $985,000

Appointment Details: Wednesday, November 1st at 2:30pm

Location: Our Main Office – 325 Main Street, Suite 100, My Town, TX 65421

Simultaneously, a pre-confirmation email will go out to the lead. An example of that email will look something like this:

Dear Liz,

It was great speaking with you today. Please reply to this email to confirm your scheduled appointment. We are looking forward to meeting and speaking with you.

Your time is very important to us and we promise not to waste your time. Your agent will work with you at your pace and is committed to providing you with information that fits your potential profile. The mission of the meeting will be to address your inquiring interests and craft a strategy that fits your needs and time frame.

We want the meeting to be convenient for you, and to ensure that, we will be sending you the meeting location and the name of the expert agent that specializes in this property shortly. Your appointment is scheduled for: Wednesday, November1st at 2:30pm

Regards,
B. Smith
Executive Coordinator
AllBest Real Estate
855 783 6374

b). The first agent to respond to the group text will receive the appointment. Immediately following that agent's acceptance of the appointment request, a second group text will go out to the same agent group, alerting all that the appointment has been accepted.

Details regarding this appointment with complete lead criteria will be emailed to the agent to confirm acceptance of appointment request. An example of this detailed email will look something like this:

Dear Linda,

We have the following appointment for you:

Face to Face – Wednesday, November 1st at 2:30pm
Appointment Location: Our Main Office – 325 Main Street, Suite #100, My Town, TX 65421
This lead would like to see the home IMMEDIATELY following your appointment
Assigned Agent: Linda Smith

<u>Lead Info:</u>

Lead Name: Liz Borchers
Phone: 415-333-2344

<u>Property Details:</u>

MLS #55512345
Property Address: 176 Park Place, Your Town, CA
Listing Price: $985,000
Listing Agent: Barry Bowman – Coldwell Banker

<u>Criteria</u>:

Size: 4 BR 3BA – 1,500 Square Feet
Area: San Raphael
Price Point: Under $1M
Time Frame: Now
Pre–Qualified: Yes
Agent: No

<u>Notes From The Call</u>:

Liz & her family are relocating to the Bay area from upstate New York. They want to be closer to their daughter who has just had a baby. Their daughter and her family live in Marin County. They are pre-qualified, and may also pay cash. If they opt to pay cash, they have a proof of funds letter to provide the seller if need be prior to viewing the property. They are both retired. They do not have an agent. They would like to have a home with plenty of light, and open floorplan with a larger than usual lot. A main floor master is also important to them, since they don't want to move again. They are looking to spend time with an agent who knows the area, and that will actually listen to their needs and take their time seriously.

d). Once the assigned agent has confirmed receipt back to LeadConnect365™ (must be within 1 hour). A final confirmation will go out to the lead. An example of this email will look something like this:

Dear Liz,

It was great speaking with you today. Please reply to this email to confirm your scheduled appointment. We are looking forward to meeting and speaking with you.
Your time is very important to us and we promise not to waste your time. You will be meeting with Linda Smith from our Marin County Office. Linda will work with you at your pace and is committed to providing you with information that fits your specific criteria.

The mission of the meeting will be to address your inquiring interests and craft a strategy that fits your needs and time frame.

It is highly recommended prior to the appointment to list out all questions you would like answered. As well as having notes you think will help insure we are meeting your needs.

Your agent and location are confirmed and your agent specialist Linda Smith with AllBest Real Estate is looking forward to your meeting. This meeting is confirmed and you can count on Linda to meet you on time.

Your appointment details are listed below:

- *Date and Time: Wednesday, November 1, 2017 at 2:30pm*
- *Appointment Location: Our Main Office - 325 Main Street, Suite #100 My Town, TX 65421*

If you have any questions, please don't hesitate to reach out to me. Linda Smith from AllBest Real Estate is looking forward to helping you at your pace and their time has been blocked out. You can count on us to be there on time and we are counting on you.

Again, please reply to this email to confirm your appointment.

Best Regards,
B. Smith
Executive Coordinator
AllBest Real Estate
855 783 6374

e). Is "closed loop" information required back from the Assigned Agent for every appointment?

Yes – feedback to the Inside Sales Department is required after each appointment. Within 24 hours of your assigned appointment someone from our Inside Sales Admin. Department will send you a feedback email with a link to an online feedback form. Within 24 hours of that being sent, the agent is required to completely fill out this feedback form indicating what transpired at your meeting. The agent is required to answer all the questions that pertain to their appointment on this form. If follow up steps are required by the LCS at LeadConnect365™ that information must be provided in detail on this feedback form as well.
Closed loop information is absolutely essential to execute a systematic follow-up & lead incubation strategy.

3). Appointment Policy / Best Practices:

a). Once an appointment is set, keep it! There is no bad lead. Some are simply not ready to buy/sell now. If this is the case with a lead you have met with, rest assured that once you have given your feedback to us, we will follow up with that lead for you until they are ready.

b). Qualify the appointment by meeting with them. If money or qualification is the question, schedule an appointment with a lender.

c). Probe or interview the lead to determine next steps; If they are not ready now, then when, and what is the follow-up strategy?

d). A follow-up strategy results in every case with the next appointment. There is no strategy without a process to get one.

e). Be professional; think like a doctor or a lawyer. You need to understand the client in order to help them. You determine the need, then the property (drug) then you give it to them (show them).

f). Every client should be tethered. That means that everyone should be tied to you and taken off the market. This is best done with an exclusive right to represent (generic) or a buyer-broker agreement.

g). You are presented by our LCS's at LeadConnect365™ as exactly the right agent for them to meet. You do not need to know everything. You DO need to listen carefully, recognize what they are actually saying and find solutions to help. **Your** ability to help is promised, not something that is unrealistic or unavailable. Remember, the truth is always what starts the help!

h). Client no-shows happen. We have committed tremendous dollar resources in controlling and reducing this effect. However, we know that statistically, 20% or 1 in 5 times is acceptable and our maximum standard. If the client no-shows, begin by calling them to see if they are just late. If you can reschedule, do so and notify the LCS immediately.

i). Agent no-shows should NOT happen. If something comes up on **Your** end you must insure that the appointment is covered. We audit EVERY no-show to determine what happened and what could be done to prevent it.

j). Phone appointments should be rare. We only schedule them in instances where the person is out of the area or otherwise unavailable to make a face-to-face appointment. Military relocation is a classic example. The purpose of the phone appointment is simply to ***get into relationship*** and connect with the lead. The results and follow up strategy should be reported back immediately to our LCS so that follow-up can occur leading to a face-to-face meeting when appropriate.

k). Phone no-shows are more likely to happen. When they do, call every 5-10 minutes for up to 1 hour to see if the lead just forgot. We confirm ALL appointments several times before they happen, so this should be a rare occurrence. (The LCS will follow-up if you cannot reach them. Be sure to let the LCS know the details in your feedback form. EVERY appointment is confirmed by the LCS, so when it is missed it is of great concern for our quality control.)

4). Confirmation Of Appointments Made

LeadConnect365™ provides a very strict confirmation policy within the organization. Our LCS's are required to confirm ALL appointments using a tested, effective script that is not only effective, but also holds the lead accountable to be there. Our scripting portrays to the lead the importance of their commitment to the appointment because your time is precious and you have blocked out this time to meet with them. The same is true from the agents end. Here are our confirmation policies:

a). If the appointment is booked more than 72 hours out, a call, text and email is sent to the lead to remind them of their appointment with the agent.

b). Another confirmation via phone will happen within 24 hours of the appointment. If the lead is not reached, then a text and email is sent to verify their commitment to be at the appointment the next day.

c). The final confirmation is made 4-5 hours prior to the appointment the day of. All contact mediums are used for this final confirmation.

d). If the LCS does not reach the lead for confirmation, an email and/or text will be sent to the assigned agent letting them know that we were unable to confirm the appointment. It will be up to the agent to move forward with the schedule appointment. Our experience has been that when this happens, most times the lead shows up.

Below is an example of what some of our Confirmation email & texts will look like:

Dear Liz & Family!

This is just a quick note to insure you have all the details necessary for your appointment with Linda Smith from AllBest Real Estate. We are looking forward to helping you. As a reminder, here are the details for your upcoming appointment:

- **Agent: Linda Smith – AllBest Real Estate**
- **Date and Time: Wednesday, November 1, 2017 at 2:30pm**
- **Appointment Location: Our Main Office - 325 Main Street, Suite #100, My Town, TX 65421**

As we mentioned before, it is strongly recommended prior to the appointment to list out all questions you would like answered. As well as having notes you think will help insure we are meeting your needs.

If you have any questions please, don't hesitate to reach out to me. Linda has her time blocked out. You can count on us to be there on time and we are counting on you.

Regards,
B. Smith
Executive Coordinator
AllBest Real Estate
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5). Reporting

LeadConnect365™ will provide your company with a log in to our system. Reporting and monitoring of all leads will be in place. You will also be able to comment back to us regarding any lead through use of this log in. We will have an online training for those assigned by your company with access to this log in.

6) Agent Training - Why does LeadConnect365™ require that every agent that will interface with leads be trained?

LeadConnect365™ is introducing a highly productive lead conversion process to your team. For this new process to deliver its desired results it is essential that everyone be trained consistently on client capture & conversion. There has to be a cultural fit for LeadConnect365™ to seamlessly integrate and perform as your appointment capture solution. Your point-of-contact at your organization will explain this concept and its implications for on-boarding during your first-month with the company.

7). Escalations & feedback procedures - Procedure to handle feedback conveyed by Your **client to LeadConnect365™.**

Your clients will view the LCS from our Inside Sales Department as Your team member. It is possible they may provide feedback regarding their experience on-line (prior to, or after, lead submission), their appointment, or their experience in working with **Your** agent after the appointment.

In all cases such feedback will be routed directly to the Company Director in the spirit of continuous improvement.

If there is feedback submitted about the Company Director it will be conveyed to the key point-of-contact at **Your** company who handles the relationship with LeadConnect365™.

a. Procedure to convey feedback to improve the process & client experience.

We are grateful to receive **Your** feedback. Please direct such input to liz@leadconnect365.com Do include a description of what can be improved, and some background for why that is important to you or **Your** business.