

Quick Start Playbook

In this playbook, we use green, yellow, and red circles to notate how actions take place within the system. This helps you understand each step in the process.

● AUTOMATION ● OUTSIDE ACTION ● LEADER ACTION

AUTOMATION ●

When you see the green circle in a playbook, that means the step has automation in it. If the dot is on the left, a recruit enters through automation. If it's on the right, they exit through automation. Green means the system is going to work and taking action for you!

OUTSIDE ACTION ●

When you see the yellow circle in a playbook step, that means an external party takes action. This could be an agent submitting a possible recruit through the platform, or the recruit taking an action such as submitting information or booking an appointment. Yellow on the left means entering through action, while on the right means exiting.

LEADER ACTION ●

When you see the red circle in a playbook step, that means the assigned leader within the system takes action. This could be moving the recruit to another step, taking attendance after an appointment, or taking some other action. The great news is that the system does the VAST majority of tasks, allowing you to buy your time back and scale more effectively.

LEFT VS RIGHT ●●

Each stage will display two colors to the right of the stage name. The LEFT color is the most likely way a recruit ENTERS the stage while the RIGHT color is the most likely way for a recruit to EXIT the stage.

R1/R2 Experienced Agent Playbook



This breaks down the stages located in the **R1/R2 Licensed Agent (EX)** pipeline to help you understand the lead flow at each step.

● AUTOMATION ● OUTSIDE ACTION ● LEADER ACTION

RECRUIT LEADS ●●

The Recruiting Leads (Pre-Appointment) stage alerts the leader that they have a licensed agent recruit and encourages them to reach out, introduce yourself, begin building rapport, and book an appointment with them. Once the leader has booked the appointment, the leader will log the date they booked the appointment on (not the date it is for) and any notes using the emailed link to the next stage. The recruit can also book themselves onto the Licensed Agent Calendar, which will move them forward in the pipeline.

APPOINTMENT SCHEDULED ●●

The Appointment Scheduled stage is used when a recruit has booked an appointment on the Licensed Agent Calendar or when the leader completes the prompt in the email notifying the system that an appointment has been scheduled. The recruit will receive reminders of the appointment when available and the leader is prompted to follow up with the recruit to ensure attendance. A recurring email will be sent to the leader asking whether or not the appointment took place, and what the result of the appointment was (the recruit showed, the recruit cancelled/no-showed). Based on the response from the leader, the system will move the recruit back to Recruit Leads (if they did not attend) or forward to Nurture Lead (if they did).

NURTURE LEAD ●●

The Nurture Lead stage prompts the leader to continually check in with the recruit after their 1:1 appointment based on the cadence set in the recruit's card (7, 14, or 30 days). This will continue until the leader updates the recruit's status in the Opportunity Card changing the check-in cadence, or moves them to the next most appropriate pipeline (typically Long Term Nurture or Onboarding) via the Exit Pipeline process.

EXIT PIPELINE ●●

This is a holding stage that a recruit enters briefly when moving between pipelines but starting in the R1/R2 Pipeline. Make sure to use the Exit Pipeline process to make sure a recruit doesn't end up in the Holding Stage. The most likely places for the recruit to go include:

- Long Term Nurture: Recruit isn't ready to change brokerages or chooses a different brokerage, and you want to keep in touch.
- Onboarding: Recruit has decided to join your Market Center. You're a rockstar!

HOLDING STAGE ●●

A Holding Stage exists at the end of each pipeline. If a recruit ends up here, it's typically due to an error when moving the recruit between pipelines. When this happens, an internal notification will be sent to the assigned user with details pertaining to the why the recruit landed here, along with pertinent information pertaining to the recruit, where they were coming from, and where they were headed.