



CRM TRAINING GUIDE



An introductory guide to our Customer Relationship Management (CRM) tool called Rent Cafe

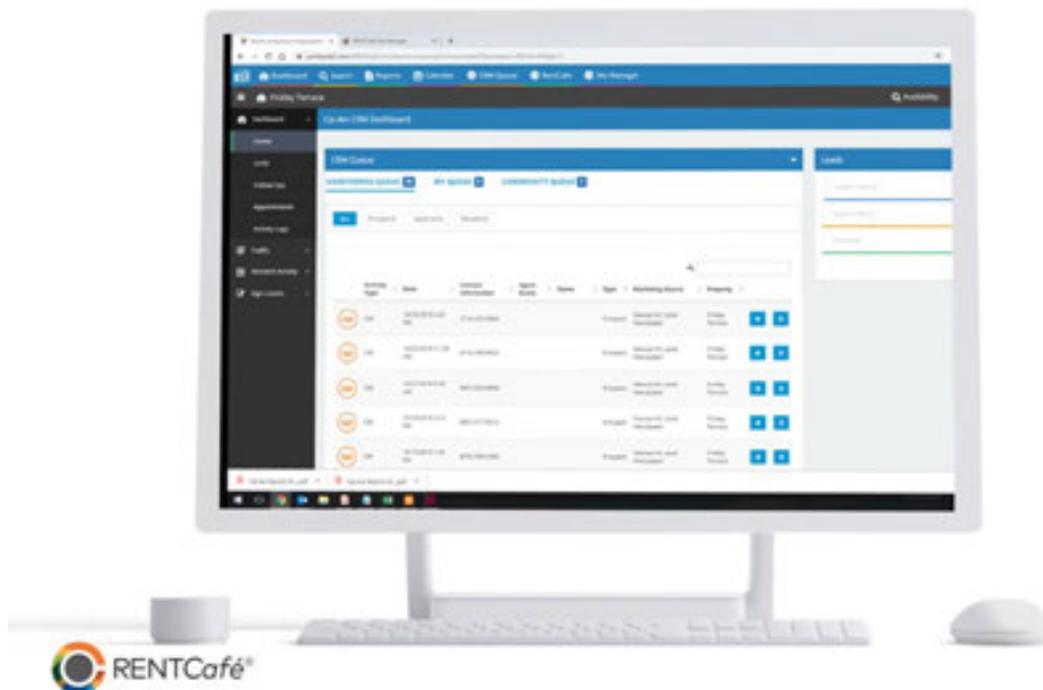


Cal-Am RentCafé CRM Sales Procedures

RentCafé CRM is a Lead Management Tool allowing you to maximize your sales efforts and efficiently manage the marketing efforts to find the most qualified prospects. This quick guide provides the basic steps to manage incoming and existing leads.

Table of Contents

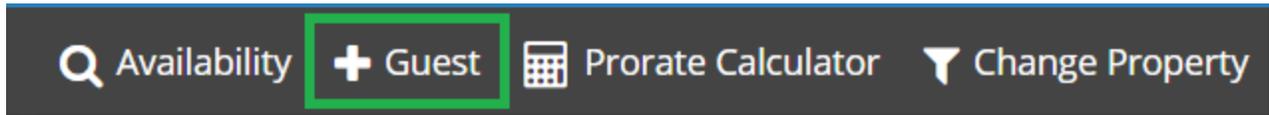
I.	Adding a Guest.....	2
II.	Viewing and Sending Emails	4
III.	Viewing and Sending SMS (Text) Messages.....	7
IV.	Creating an Appointment	9
V.	Creating a Follow-Up	11
VI.	Adding a Show/Tour	14
VII.	Updating Guest Status (Warm/Cold and Taking Deposit)	16
VIII.	Dashboard Unreviewed Queue	18
IX.	Dashboard My Queue/Community Queue.....	21
X.	CRM Calendar	24
XI.	Dashboard Pipeline	25
XII.	Detailed Guest Search.....	26
XIII.	Appendix (Workflow Diagram, Auto Response & Drip Email Messages and Text Messages)	28



I. Adding a Guest

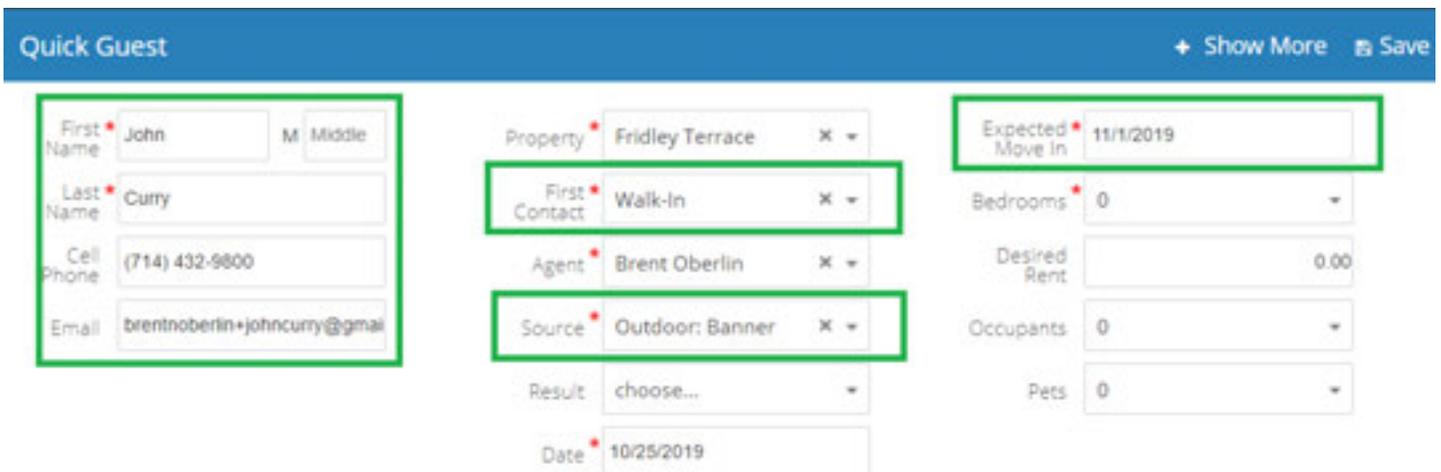
If a new guest walks in or contacts you directly without using a special CRM marketing email or phone number, you will create the guest manually using these instructions. If the guest called or emailed using one of the special marketing numbers, they will show up in the Unreviewed Queue detailed in section VIII – Dashboard Unreviewed Queue.

1. From the home page, click on the “+ Guest” button in the upper right of the page:



2. On the Quick Guest screen, enter the following information:

- First Name
- Last Name
- Cell Phone
- Email – While not a required field on this page, it is very important to get the guest’s email address so that automated correspondence can begin
- First Contact – How the person first contacted you (walk-in*, phone call, etc)
- Source – How they heard of your property. This list will be custom configured for each property based on the active marketing campaigns.
- Expected Move In – Note that this is just a guideline and can be easily changed later

A screenshot of the 'Quick Guest' form. The form has a blue header with 'Quick Guest' on the left and '+ Show More' and 'Save' on the right. The form fields are arranged in three columns. The first column contains: 'First Name' (John), 'Middle' (M), 'Last Name' (Curry), 'Cell Phone' ((714) 432-9800), and 'Email' (brentnoberlin+johncurry@gmail). The second column contains: 'Property' (Fridley Terrace), 'First Contact' (Walk-In), 'Agent' (Brent Oberlin), 'Source' (Outdoor: Banner), 'Result' (choose...), and 'Date' (10/25/2019). The third column contains: 'Expected Move In' (11/1/2019), 'Bedrooms' (0), 'Desired Rent' (0.00), 'Occupants' (0), and 'Pets' (0). Several fields are highlighted with green boxes: the entire first column, 'First Contact', 'Source', and 'Expected Move In'.

*If a person walked-in and took a tour you will need to select “Walk In” under First Contact and then mark it as a showing. Adding a Showing is covered in section VI, page 15

- Review the “Matched Guests” section at the bottom of the page, which will list out any other active guests at this property that have a similar name, phone number, or email address. It’s possible that this guest has already contacted the property before and there are previous records emails and appointments for this person.
 - If someone in the “Matched Guests” list is the person you spoke with, or is the spouse/roommate of the person you spoke with, toggle on the “Select” button and then click the “Merge Guests” button.
 - If the person you spoke with has no relation to any of the “Matched Guests”, then click the “Save” button in the upper right of the page.

Quick Guest + Show More Save

First Name: John M Middle
 Last Name: Camy
 Cell Phone: (714) 432-9800
 Email: brennoberlin-johncurry@gmail.com

Property: Fridley Terrace X
 First Contact: Walk-In X
 Agent: Brent Oberlin X
 Source: Outdoor: Banner X
 Result: choose...
 Date: 10/25/2019

Expected Move In: 11/1/2019
 Bedrooms: 0
 Desired Rent: 0.00
 Occupants: 0
 Pets: 0

Matched Guests

Merge Guests Use the checkboxes below to select guests for merge or click Save to add a new guest.

Q

Select	Property	Unit	Rank %	Name	View	Phone	Email	Address	Status
<input checked="" type="checkbox"/>	Fridley Terrace		7	John Doe	View		brennoberlin-test090919@gmail.com		Canceled Guest
<input type="checkbox"/>	Fridley Terrace		7	John Doe	View	(714) 422-5997	brennoberlin-test0909195@gmail.com		Canceled Guest

- Once on the Profile page, you can change details and view an overview of upcoming follow-ups and recent activity. The **left-side menu will have changed** to a separate menu that focuses on this guest. The only other items in the left menu used for the lead/sales process are Profile and Activities. Actions in the Activities tab are covered in the next few chapters of this manual.

Guest | Fridley Terrace Cancel Guest Screening Move to RentCalc Jump

John Curry (Prospect) Share

Primary Guest

Wagon Code: 2017101
 Source: Outdoor: Banner
 Email: brennoberlin-johncurry@gmail.com
 Phone: (714) 432-9800
 Preferred Contact Method: Home
 Title:

Guest Card

Was Contacted: 10/25/2019
 Last Contacted: 10/25/2019
 Move In Date: 11/1/2019
 Agent: Brent Oberlin

Apartment # Not Selected

Unit Type:
 Details:
 Rent: \$0.00
 Fridley Terrace
 1400 Taylor St #10
 Fridley, WA 98102

Profile Application Guest Card Save

Profile Status

First Name: John Middle
 Last Name: Camy
 Address:
 City:
 State: WA

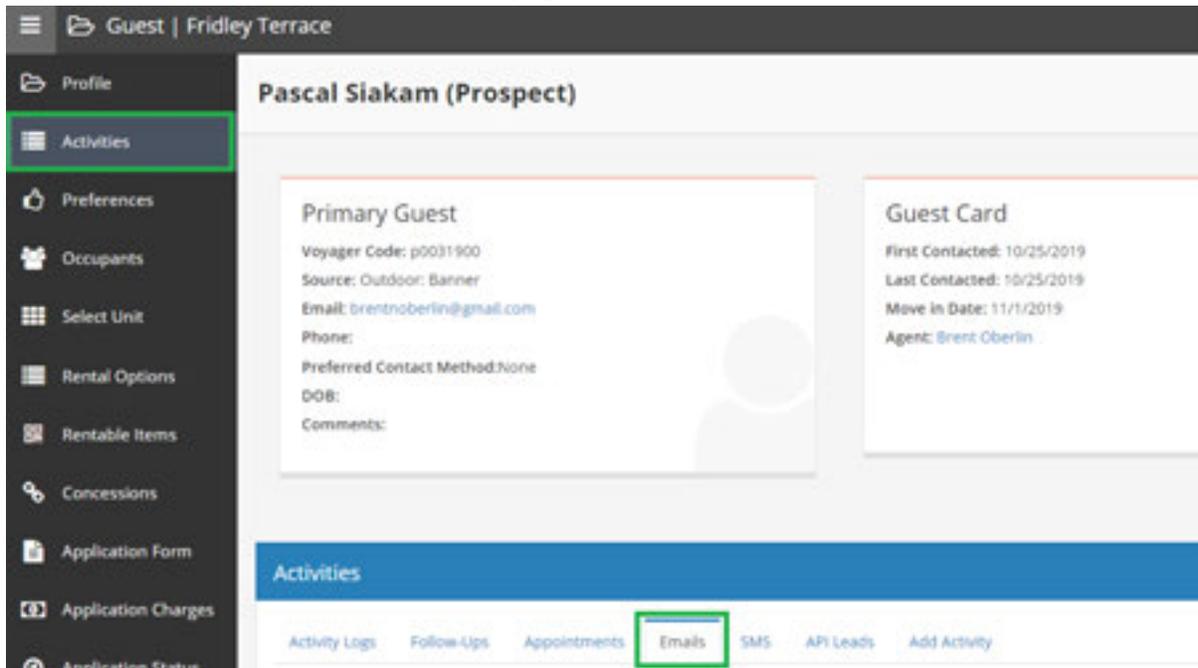
Cell Phone: (714) 432-9800
 Work Phone:
 Fax:
 Email: brennoberlin-johncurry@gmail.com

M Date:
 Reference:
 Notes:

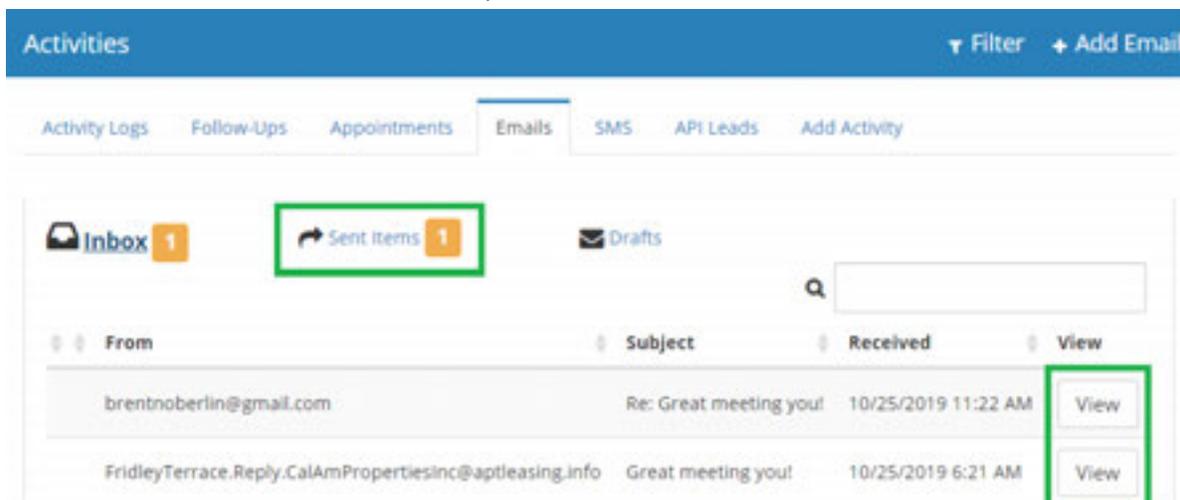
II. Viewing and Sending Emails

Rather than using Outlook, **all email communication with guests will now be done through CRM.** This allows us to set up automatic emails at certain times, organize emails by guest instead of having a long list in your inbox coming from many different sources, and review previous communication with leads that were done by other sales agents.

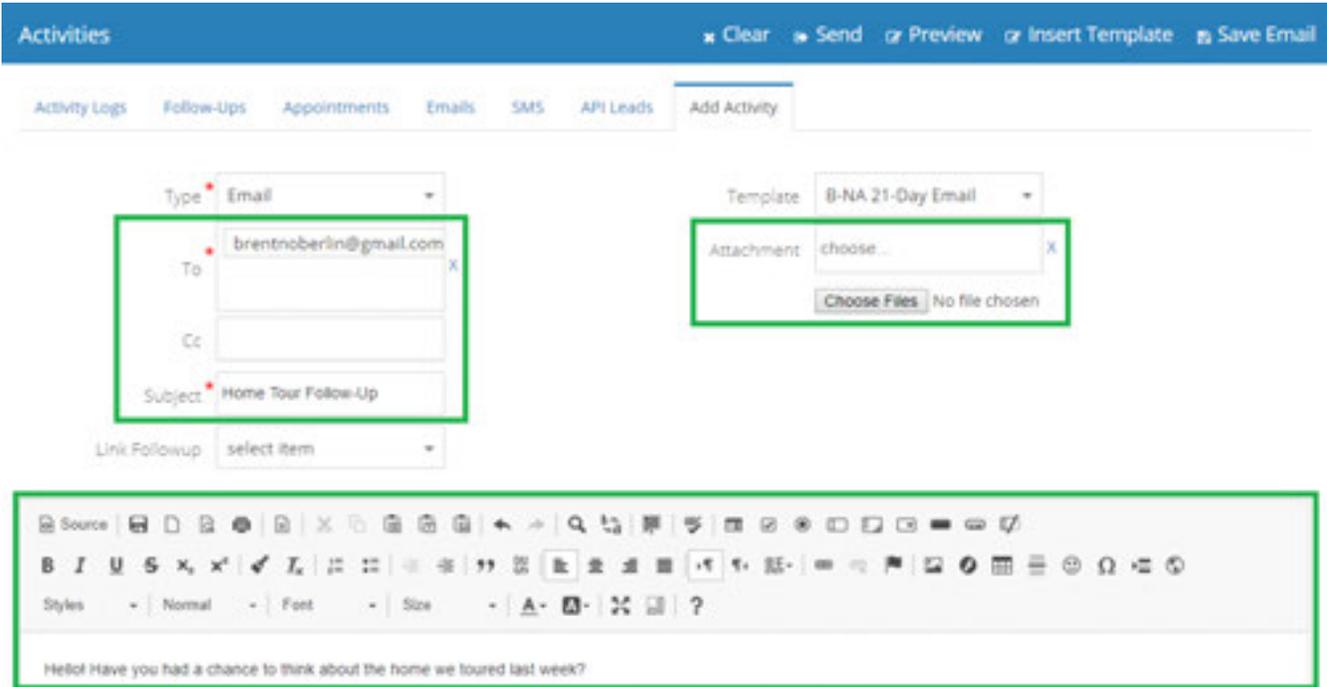
1. Navigate to the guest page, click on “Activities” on the left-side menu, then click on the “Emails” tab in the middle of the page:



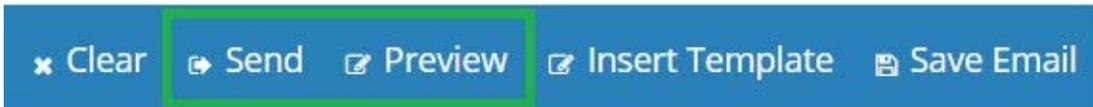
2. Within the Emails tab, you are defaulted to the “Inbox” view, which shows all emails that have been received by the guest or sent directly from an agent.
 - To view the contents of an email, click on the “View” button and the details of the email will appear below the inbox list.
 - To view all sent emails, including auto-sent emails from scheduled follow-ups (more on these in the next section), click on the “Sent Items” button.



- Clicking “Reply” or “Reply All” from step 3, or “+ Add Email” from step 4 will take you to the “Add Activity” tab, with a type of “Email” selected. Complete the following fields:
 - To – This will default to the guest’s main email, but you can add more.
 - Cc – (Optional) Add anyone else you want to include in the Cc line of the email.
 - Subject – Email subject line
 - Attachment – (Optional) Upload any attachments from your computer.
 - Body – Your complete email message with formatting options.



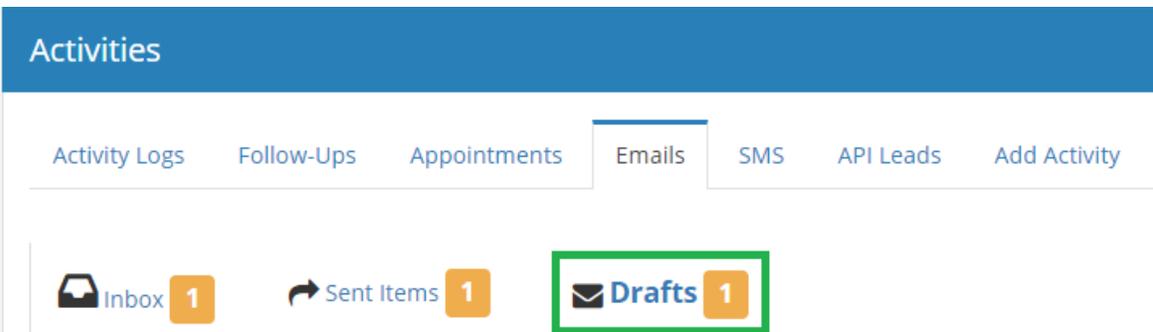
- Once you are ready to send your email, click the “Preview” button to see how the body of the email will show up to the guest, then click the “Send” button.



- If you are not ready to send the email yet, you can click on the “Save Email” button, which will save the email to be completed later in the “Drafts” section.



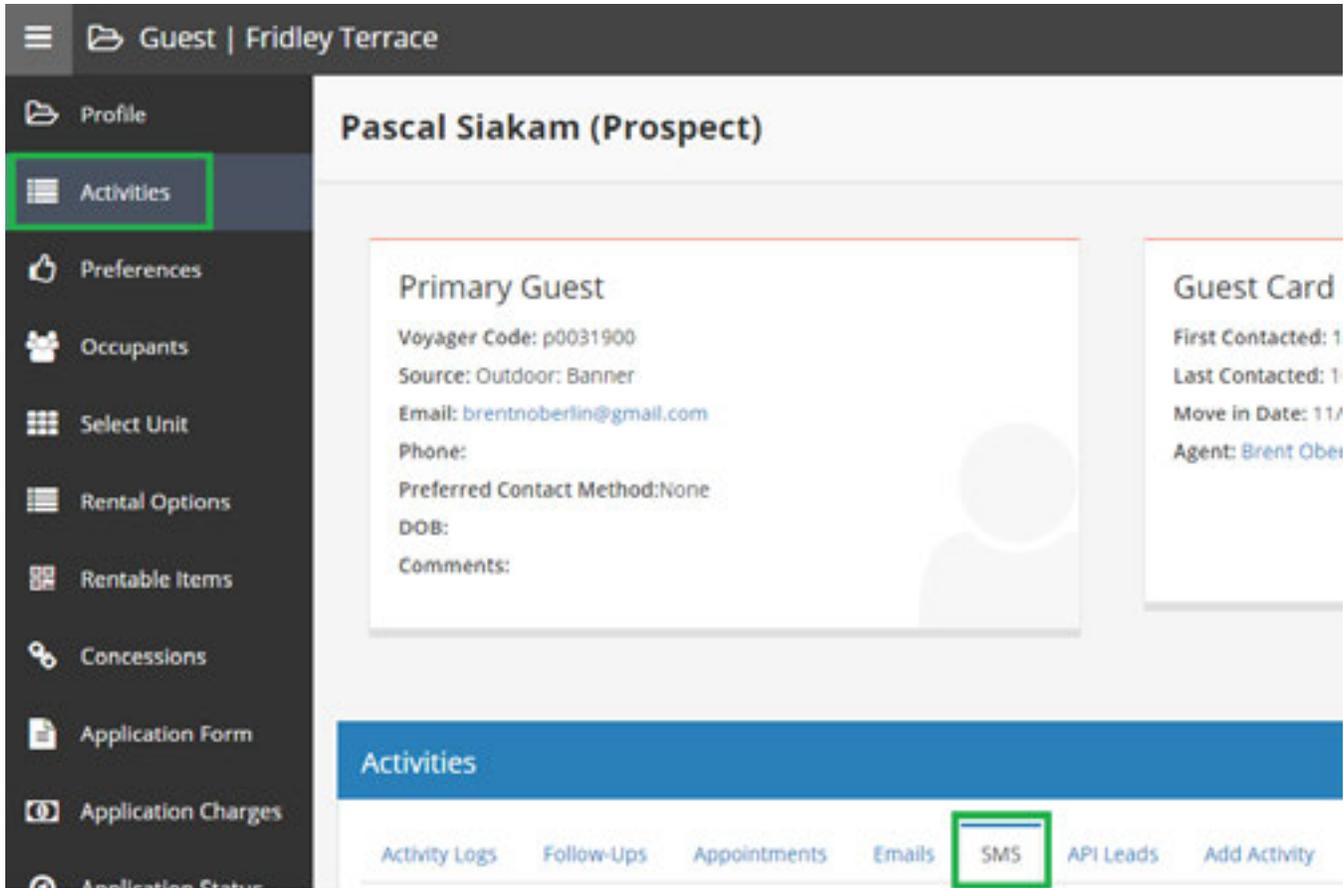
- To review any unsent emails that have been saved (by you or another agent), return to the Email tab and click on the “Drafts” button



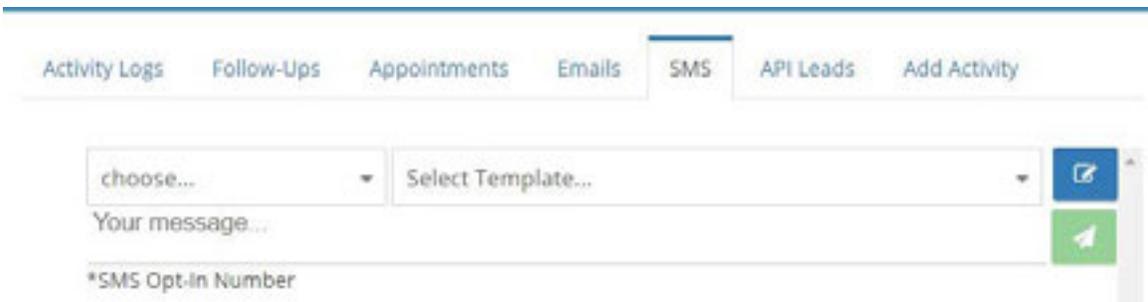
III. Viewing and Sending SMS (Text) Messages

Rather than using your phone, all text communication with guests will now be done through CRM. This allows better organization of text messages with the other forms of communication with a guest, and makes it easier to review previous communication with leads done by other agents.

1. Navigate to the guest page, click on “Activities” on the left-side menu, then click on the “SMS” tab in the middle of the page:



2. On the SMS pane, you will see a list of previous communication (if any), and at the bottom you can type a new message over the “Your message...” field. To send, click on the green button with a paper airplane on the right side:



choose... Select Template...
Hi Pascal! It was great meeting you today! Reply to this text if you have any questions before our appointment on Tuesday.
*SMS Opt-In Number

3. The first time the guest receives a text message from your property they will receive the following text message. Once they respond with “Yes”, they will receive your text message and any others going forward.

SYSTEM (833) 377-7236 ▶ (714) 422-5997
Opt-In Request Sent: Reply YES if Fridley Terrace may contact you via text msg, STOP to quit. No purchase necessary to receive msgs. Msgs may be automated. Msg&Data rates may apply

SYSTEM (714) 422-5997 ▶ (833) 377-7236
Opt-In Response Received: YES

(833) 377-7236 ▶ (714) 422-5997 10/25/2019 1:35:51 PM ✓
Hi Pascal! It was great meeting you today! Reply to this text if you have any questions before our appointment on Tuesday.

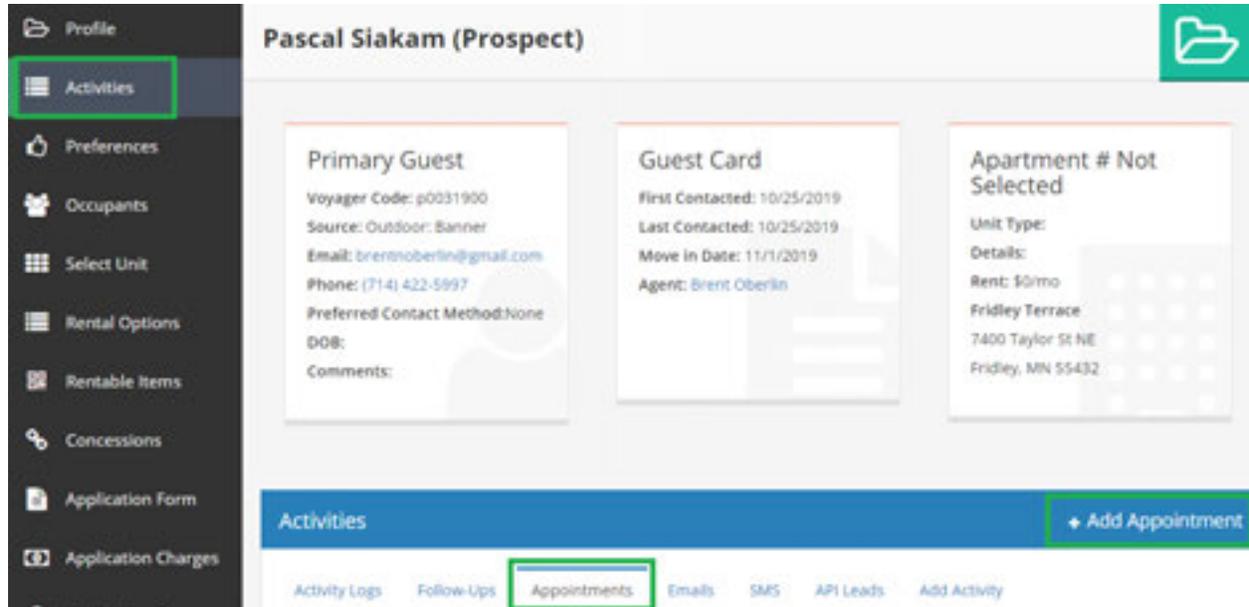
(714) 422-5997 ▶ (833) 377-7236 10/25/2019 1:40:11 PM
Great meeting you too! Looking forward to it

4. Final Note: This page will not auto-refresh for an ongoing conversation, so you will need to return to the SMS pane using the instructions in step 1 of this section.

IV. Creating an Appointment

Once you have scheduled an appointment with a guest, you should add it to CRM so that it shows up on the CRM Calendar.

1. Navigate to the guest page, click on “Activities” on the left-side menu, then click on the “Appointments” tab in the middle of the page, and finally click on “+ Add Appointment” in the upper-right of the Activities pane.



2. On the “Add Activity” tab, complete the following fields:
 - Agent – The person who will perform the show/tour
 - Unit – (optional) Select the unit the guest will be shown
 - Notes – (optional) Add any notes the agent should review before the tour
 - Start Date / Start Time – The exact date and time of the appointment
 - Reminder Date / Reminder Time – (optional) Sets a specific time to send the guest a reminder email that they have an upcoming appointment. This defaults to one hour before the appointment, but you may choose to do it earlier in the morning or even the day before. If you want to send multiple reminders, please set one here and create custom follow-ups for any others (see section V. Creating a Follow-Up)
 - Duration Hours / Minutes – Sets the amount of time the block off on the CRM Calendar for this appointment. Defaults to 30 minutes.

Activity Logs Follow-Ups Appointments Emails SMS API Leads **Add Activity**

Type Appointment

Agent Brent Oberlin

Unit A001 - Fridley Terr...

Notes Really interested in seeing the property amenities as well

Start Date 10/25/2019

Start Time 1:53 PM CST

Reminder Date 10/25/2019

Reminder Time 12:53 PM CST

Duration Hours 0

Minutes 30

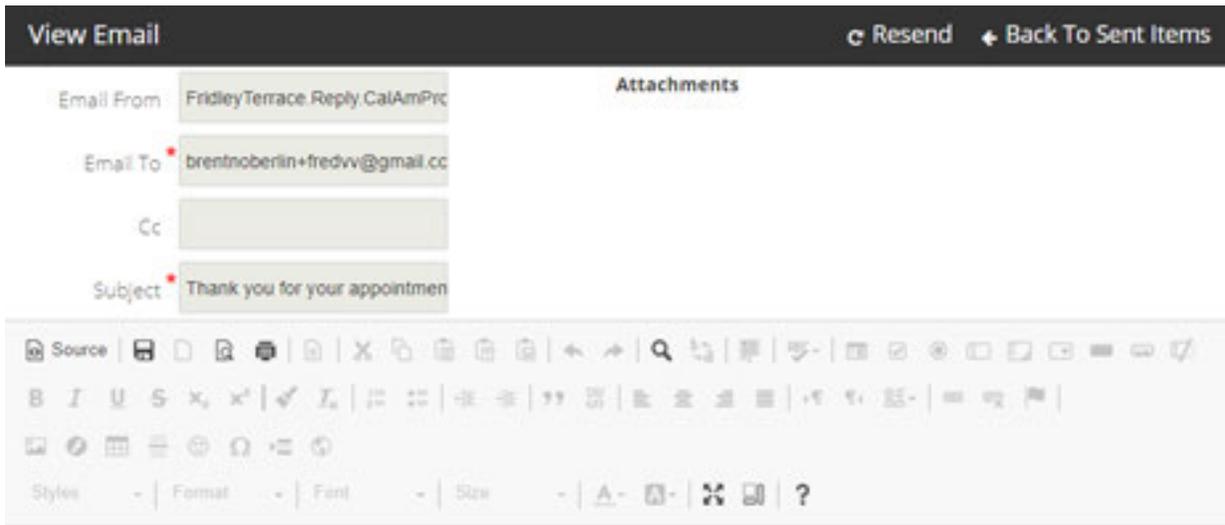
- Once all fields are complete, click on the “Save” button in the upper right of the “Activities” pane.

Activities Clear **Save**

Activity Logs Follow-Ups Appointments Emails SMS API Leads **Add Activity**

Type Appointment Start Date 10/25/2019

- Immediately after creating an appointment, the guest will get a “Thank You” email with date/time, phone number, and address information. This email can be found in the “Sent Items” section of the “Email” tab (see section I, step 2).



Hello Fred,

Thank you for scheduling time to see our homes for sale. Our on-site team is excited to meet you and learn more about your housing needs. Your scheduled time is:

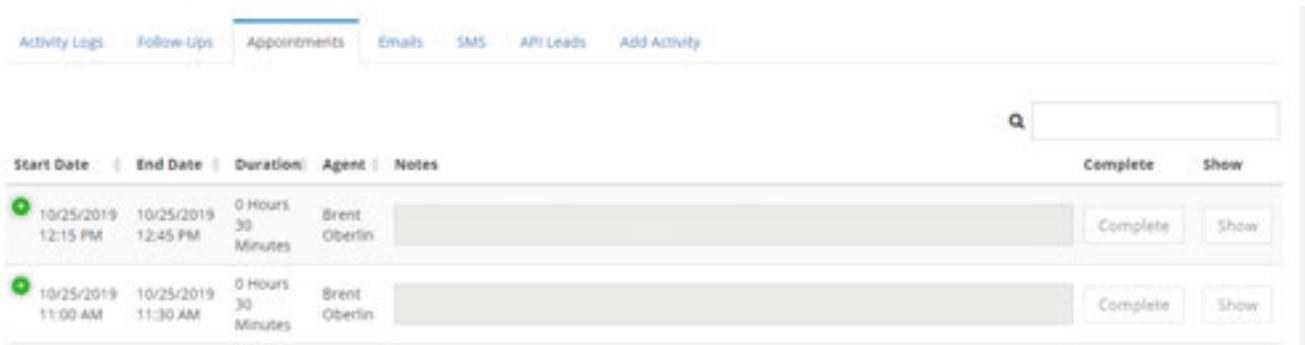
10/25/2019 12:15:00 PM

We are eager to give you a tour of our community and the homes we currently have for sale. Once you see our amenities and learn more about today's manufactured home, we're sure you'll be pleased you came by.

If you have any questions prior to your appointment, please call us at (763) 784-2431.

Sincerely,
 Brent Oberlin
 Fridley Terrace
 7400 Taylor St NE

- The "Appointments" tab will now also include all appointments that have been scheduled for this guest in the past or future:



V. Creating a Follow-Up

Follow-Ups are possibly the most important feature of CRM. These help make sure that guests are receiving communications from Cal-Am on a regular basis, building rapport and increasing their likelihood of buying a home.

There are two primary types of follow-ups:

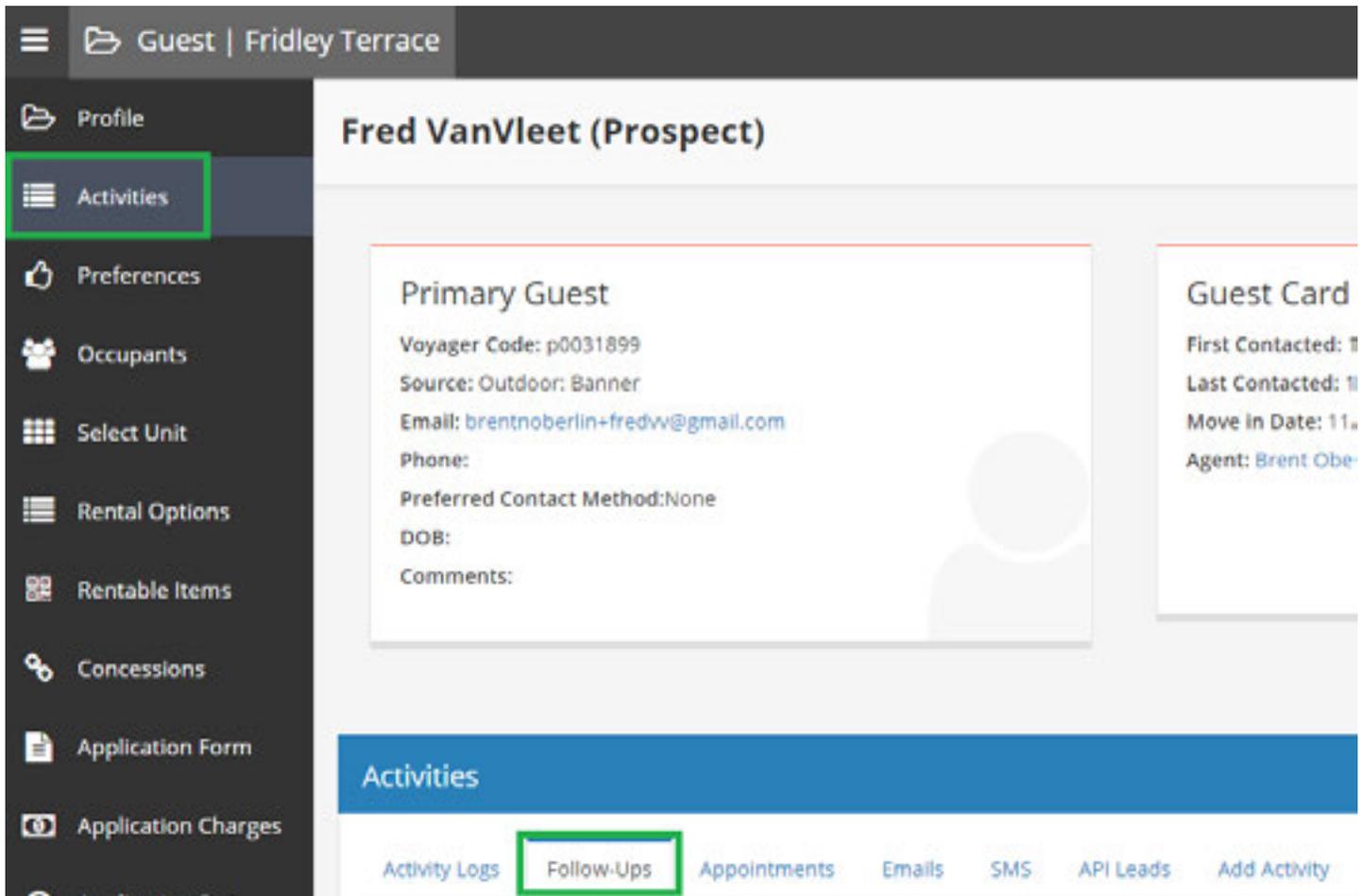
- Reminders to leasing agents to email, text, or call a guest
- Emails that will auto-send at the designated date and time

The Cal-Am Marketing team has put together a "default" system of scheduled calls, texts, and automated emails based on whether a lead is warm or cold, has made an appointment, missed an

appointment, our already had a home showing/tour. CRM will automatically update the active follow ups based on the Marketing team’s plan as you schedule appointments, perform showings, and update statuses in CRM.

This section of the guide will go over how to view upcoming follow-ups for a guest and how to create one-off follow-ups.

1. Navigate to the guest page, click on “Activities” on the left-side menu, then click on the “Follow-Ups” tab in the middle of the page:



2. Within the Follow-Ups tab, you can see all future active follow-ups. Note that on the right side there is an “auto-send” toggle, which when on means that that follow-up email will be sent out automatically. All others are actions that an agent will need to perform.

Activities Filter + Add Followup

Activity Logs Follow-Ups Appointments Emails SMS API Leads Add Activity

Search:

Due Date	Complete Date	Event	Type	Description	Notes	Active	Auto Send
12/27/2019 12:15 PM		First Contact	Email	Follow-Up Email 4 - Promos		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
11/15/2019 12:15 PM		First Contact	Email	Follow-Up Email 3 - Benefits +		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
10/28/2019 12:15 PM		First Contact	Email	Follow-Up Email 2 - Promos + F		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
10/28/2019 12:15 PM		First Contact	Call	Follow-Up Call 2 - Schedule Ap		<input checked="" type="checkbox"/>	<input type="checkbox"/>
10/27/2019 12:15 PM		First Contact	SMS	Follow-Up Text 1		<input checked="" type="checkbox"/>	<input type="checkbox"/>
10/26/2019 12:15 PM		First Contact	Call	Call Center Follow Up - Schedu		<input checked="" type="checkbox"/>	<input type="checkbox"/>

3. To create a new custom follow-up for the guest, click on the “+ Add Followup” button on the upper right part of the Follow-Ups tab.



4. On the “Add Activity” tab for the “Followup” type, complete the following fields:
- Agent – The agent responsible for performing this follow-up
 - Contact Type – Call, Email, or SMS. This can also be left as “Any”, so that the agent can decide at time of follow-up what the best method of contact is.
 - Notes – Any notes that should be reviewed before contacting the guest for this follow-up
 - Due Date / Time – The date and time that the follow-up should be performed.

Activity Logs Follow-Ups Appointments Emails SMS API Leads Add Activity

Type: Followup

Agent: Brent Oberlin

Unit: select item

Contact Type: Call

Follow-up Type:

Notes: Give Fred a call and ask if he's had a chance to discuss the home purchase with his wife Janet

Due Date: 10/25/2019

Due Time: 3:30 PM CST

Complete:

- Once all fields are complete, click on the “Save” button in the upper right of the Activities pane.



- The custom follow-up will now be added to the Follow-Up tab from step 2. Reviewing follow-ups as the date arrives will be covered in section IX. Dashboard My Queue/Community Queue.

Activity Logs **Follow-Ups** Appointments Emails SMS API Leads Add Activity

Q

Due Date	Complete Date	Event	Type	Description	Notes	Active	Auto Send
12/27/2019 12:15 PM		First Contact	Email	Follow-Up Email 4 - Promos		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
11/15/2019 12:15 PM		First Contact	Email	Follow-Up Email 3 - Benefits +		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
10/29/2019 12:15 PM		First Contact	Email	Follow-Up Email 2 - Promos + F		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
10/28/2019 12:15 PM		First Contact	Call	Follow-Up Call 2 - Schedule Ap		<input checked="" type="checkbox"/>	<input type="checkbox"/>
10/27/2019 12:15 PM		First Contact	SMS	Follow-Up Text 1		<input checked="" type="checkbox"/>	<input type="checkbox"/>
10/26/2019 12:15 PM		First Contact	Call	Call Center Follow Up - Schedu		<input checked="" type="checkbox"/>	<input type="checkbox"/>
10/25/2019 3:30 PM			Any		Give Fred a call and ask if he's had a chance to discuss the home purchase with his w	<input checked="" type="checkbox"/>	<input type="checkbox"/>

VI. Adding a Show/Tour

After a show or tour has been performed and the guest has either placed a deposit or gone home to consider it, a record of this show must be recorded in CRM.

1. Navigate to the guest page, click on “Activities” on the left-side menu, then click on the “Add Activity” tab. Select “Show” in the “Activity” dropdown.

The screenshot shows the CRM interface for a prospect named Fred VanVleet. The left sidebar contains a menu with 'Activities' highlighted. The main content area is divided into three cards: 'Primary Guest' (Voyager Code: p0031899, Source: Outdoor: Banner, Email: brentnoberlin@fredvw@gmail.com, Phone: , Preferred Contact Method: None, DOB: , Comments:), 'Guest Card' (First Contacted: 10/25/2019, Last Contacted: 10/25/2019, Move in Date: 11/1/2019, Agent: Brent Oberlin), and 'Apartment # Not Selected' (Unit Type: , Details: Rent: \$0/mo, Fridley Terrace, 7400 Taylor St NE, Fridley, MN 55432). Below these cards is the 'Activities' section with a blue header and 'Add Activity' button highlighted. The 'Add Activity' form shows a dropdown menu with 'Activity' selected and 'Show' highlighted in the dropdown list. Other fields include 'Type' (Activity), 'Agent' (choose...), and 'Clear' and 'Save' buttons.

2. In the “Add Activity” tab, complete the following fields:

- Unit – The primary unit they viewed. If they viewed multiple, include the one they were most interested in and include the rest in the Notes field.
- Date / Time – The date and time the showing began.
- Notes – Any notes you’ll want to review from the showing, including any additional units they were shown.
- Agent – The Agent that performed the showing.
- Result – Three options based on the guest’s decision and the agent’s evaluation of the lead:
 - Deposit – The guest placed a deposit on the spot
 - No Deposit - Warm – The guest did not place a deposit, but is very actively looking to buy
 - No Deposit - Cold – The guest did not place a deposit and is not very actively looking to buy

Type

Activity

Unit

Date

Time CST

Notes

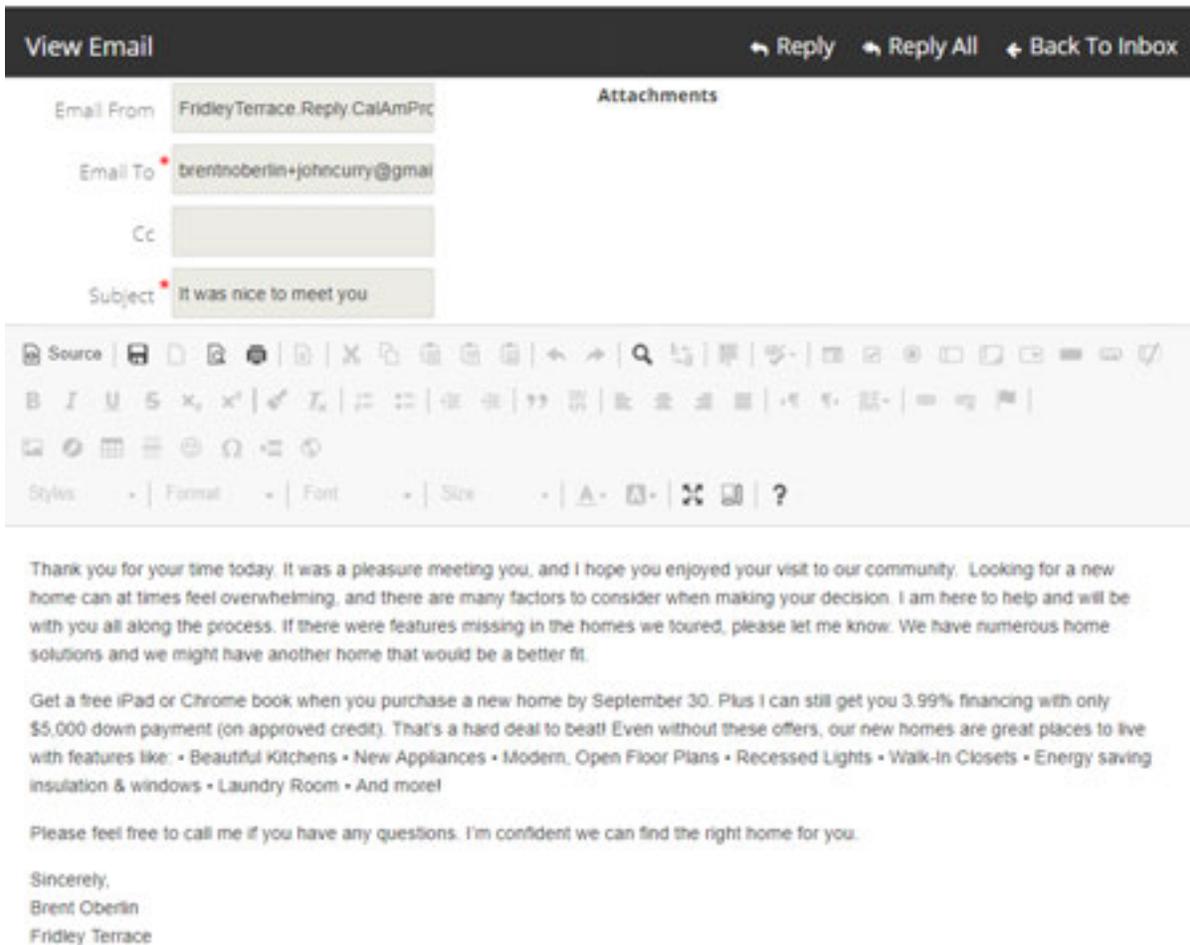
Agent

Result

- Once all fields are complete, click the "Save" button in the upper right. This will trigger an automatic thank you email and other follow-ups depending on the "Result" chosen.



Sample Email:



VII. Updating Guest Status (Warm/Cold and Taking Deposit)

If you need to update a guest status or take a deposit at a time other than after a showing, such as after a phone call, follow the below steps.

1. Navigate to the guest page, then click on the “Status” tab on the main “Profile” page.

Profile

John Curry (Prospect)

Primary Guest

Voyager Code: p0031901
Source: Outdoor: Banner
Email: brentnoberlin+johncurry@gmail.com
Phone: (714) 432-9800
Preferred Contact Method: None
DOB:
Comments:

Profile

Profile **Status**

2. Make changes to the “Deposit Made” and/or “Warm/Cold Lead” fields based on your interaction with the guest, and then update the “Date Updated” to the current date. Finally, click the “Save” button in the upper right.

Profile Save

Profile **Status**

Deposit Made No Deposit

Warm/Cold Lead Cold

Date Updated 10/25/2019

- This will automatically update the scheduled Follow-Ups for the guest in accordance with the options selected (Warm leads will get more Follow-Ups, cold leads will get fewer, and making a deposit will send a thank you email and prompt the agent to mail a Thank You card).

Activity Logs | **Follow-Ups** | Appointments | Emails | SMS | API Leads | Add Activity

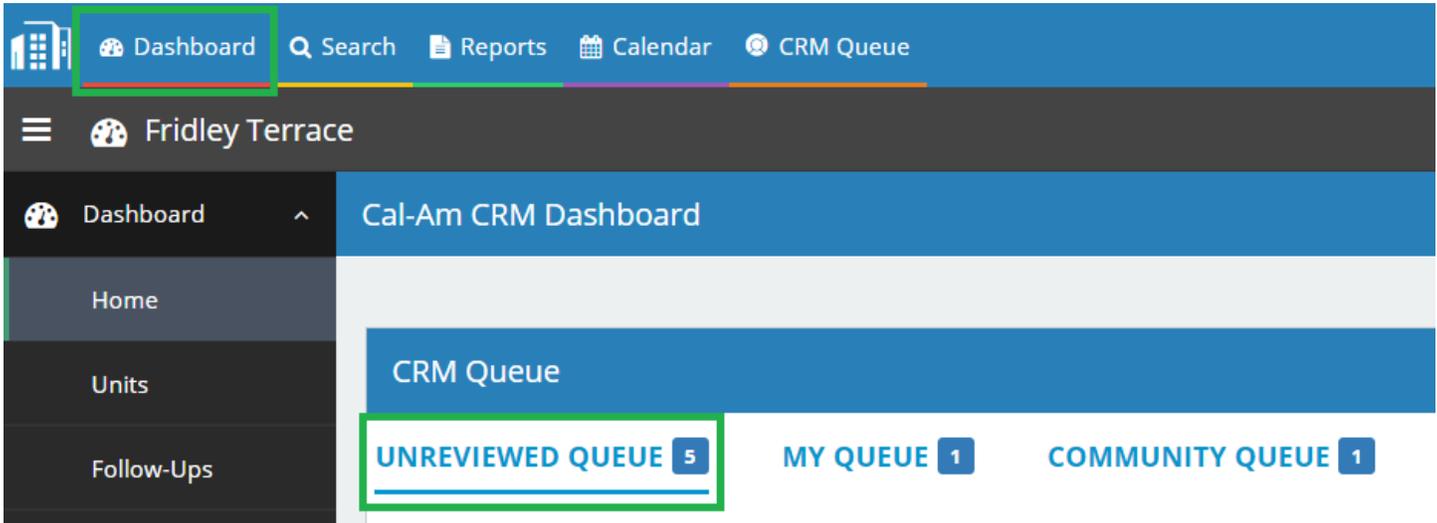
Q

Due Date	Complete Date	Event	Type	Description	Notes	Active	Auto Send
12/6/2019 2:42 PM		First Showing	Email	SWEmail - Promo		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
11/18/2019 2:42 PM		First Showing	Call	SWCall		<input checked="" type="checkbox"/>	<input type="checkbox"/>
11/17/2019 2:42 PM		First Showing	Email	SWEmail - Benefits, Promo		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
10/29/2019 2:42 PM		First Showing	SMS	SWText - Promo		<input checked="" type="checkbox"/>	<input type="checkbox"/>
10/28/2019 2:42 PM		First Showing	Email	UWEmail - Promo, Features		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
10/27/2019 2:42 PM		First Showing	Call	SWCall - Update Status		<input checked="" type="checkbox"/>	<input type="checkbox"/>

VIII. Dashboard Unreviewed Queue

This is where agents will be spending a majority of their time reviewing incoming communication from new and existing leads.

1. This is the default view when logging in. To return to the Unreviewed Queue, click on “Dashboard” in the top menu then click on “Unreviewed Queue” in the upper left of the screen.



2. The Unreviewed Queue shows all communications coming in via sms, email, and phone call/voicemail that have not yet been reviewed by any agent. The icons on the left side are color coded:
 - Blue items are from a guest that is currently in the system with that contact information. If the guest is responding to an email originally sent by a specific agent, that agent’s name will populate in the “Agent Name” column.
 - Orange items are from phone numbers or email addresses that are not currently linked to any guest.

Activity Type	Date	Contact Information	Agent Name	Name	Type	Marketing Source	Property
 SMS	10/25/2019 3:15 PM	(714) 422-5997		Kawhi Leonard	Prospect	Digital: Cal-Am Website	Fridley Terrace 
 Call	10/25/2019 2:11 PM	(901) 650-4879			Prospect	Newsprint: Local Newspaper	Fridley Terrace 
 Email	10/25/2019 11:22 AM	brentnoberlin@gmail.com	Brent Oberlin	Pascal Siakam	Prospect	Reply	Fridley Terrace 
 Call	10/25/2019 10:49 AM	(901) 409-2004			Prospect	Newsprint: Local Newspaper	Fridley Terrace 
 Call	10/25/2019 10:28 AM	(714) 432-9800			Prospect	Outdoor: Banner	Fridley Terrace 

3. To review an item in the queue, click on the blue arrow on the right side of the screen.

Activity Type	Date	Contact Information	Agent Name	Name	Type	Marketing Source	Property
 SMS	10/25/2019 3:15 PM	(714) 422-5997		Kawhi Leonard	Prospect	Digital: Cal-Am Website	Fridley Terrace
 Call	10/25/2019 2:11 PM	(901) 650-4879			Prospect	Newsprint: Local Newspaper	Fridley Terrace
 Email	10/25/2019 11:22 AM	brentnoberlin@gmail.com	Brent Oberlin	Pascal Siakam	Prospect	Reply	Fridley Terrace
 Call	10/25/2019 10:49 AM	(901) 409-2004			Prospect	Newsprint: Local Newspaper	Fridley Terrace
 Call	10/25/2019 10:28 AM	(714) 432-9800			Prospect	Outdoor: Banner	Fridley Terrace

4. For blue items, depending on the activity type it will open one of three tabs on the guest page.

- Email – Opens “Emails” tab, allows you to read and reply to the email (see section II)
- SMS – Opens “SMS” tab, allows you to read and reply to the message (see section III)
- Call – Opens the “Activity Logs” tab. From here, you can click on the “Calls” link on the right side to listen to the call, or click the “Edit” button to add additional notes to the call.

Type	Date	Complete Date	Agent	Description	Source	Record	Edit
Call	10/25/2019 2:11 PM	10/25/2019 5:04 PM	Brent Oberlin	Auto-linked call.	Newsprint: Local Newspaper	Calls	Edit

After reviewing and responding to the guest’s communication, you may also want to set up an appointment (section IV) or create another follow-up for yourself to contact them again later (section V).

5. For orange items, a simple “Create Guest” screen will open. On the left side of this screen is information on the communication; for a call clicking the “Call” button will play a recording of the call or voicemail, and for email/sms the text will be in this panel.

Back To Queue
Call
POPPED DATE
0/25/2019 10:49:13 AM
MARKETING SOURCE
Newsprint: Local Newspaper

Home Phone (901) 409-2004
Cell Phone
Office Phone
Email

First Name
Last Name
Property Fridley Terrace
Unit select item

Address
City MEMPHIS
State TN
Zip Code

Review Matches
No results.

6. CRM will complete as much information as possible from the communication, such as entering the City/State based on the zip code of the phone number. Use the communication to fill out as much additional information as possible.
7. Review the “Review Matches” section at the bottom of the page, which will list out any other active guests at this property that have a similar name, phone number, or email address. It’s possible that this guest has already contacted the property before and there are previous records from any emails or appointments.
 - If someone in the “Review Matches” list is the communication sender, or is the spouse/roommate of that person, turn on the toggle and then click the “Select” button.
 - If the person you spoke with has no relation to any of the “Matched Guests”, then click the “+ Create Guest” button in the upper right of the page.

Find Person
Remove Queue Item + Create Guest

Back To Queue
Call
POPPED DATE
10/25/2019 10:49:13 AM
MARKETING SOURCE
Newsprint: Local Newspaper

Home Phone (901) 409-2004
Cell Phone
Office Phone
Email

First Name Janet
Last Name Curry
Property Fridley Terrace
Unit select item

Address
City MEMPHIS
State TN
Zip Code

Review Matches
Merge Guests Use the checkboxes below to select guests for merge

11% **John Curry (Prospect)**
Fridley Terrace,
cell phone: (714) 432-9800 home phone: office phone: fax #: email:
brentnoberlin-johncurry@gmail.com **Select**

8. If you selected “+ Create Guest” in step 7, then you will be taken to the standard “Create Guest” screen. Review Section I, steps 2-4 for information on how to complete this screen.

+ Create Guest
+ Show More Remove Queue Item Save

Back to Find Person
Call
POPPED DATE
10/25/2019 10:49:13 AM
MARKETING SOURCE
Newsprint: Local Newspaper

First Name Janet M Middle
Last Name Curry
Cell Phone
Email

Property Fridley Terrace
First Contact Call
Agent Brent Oberlin
Source Newsprint: Local N...
Result choose...
Date 10/25/2019

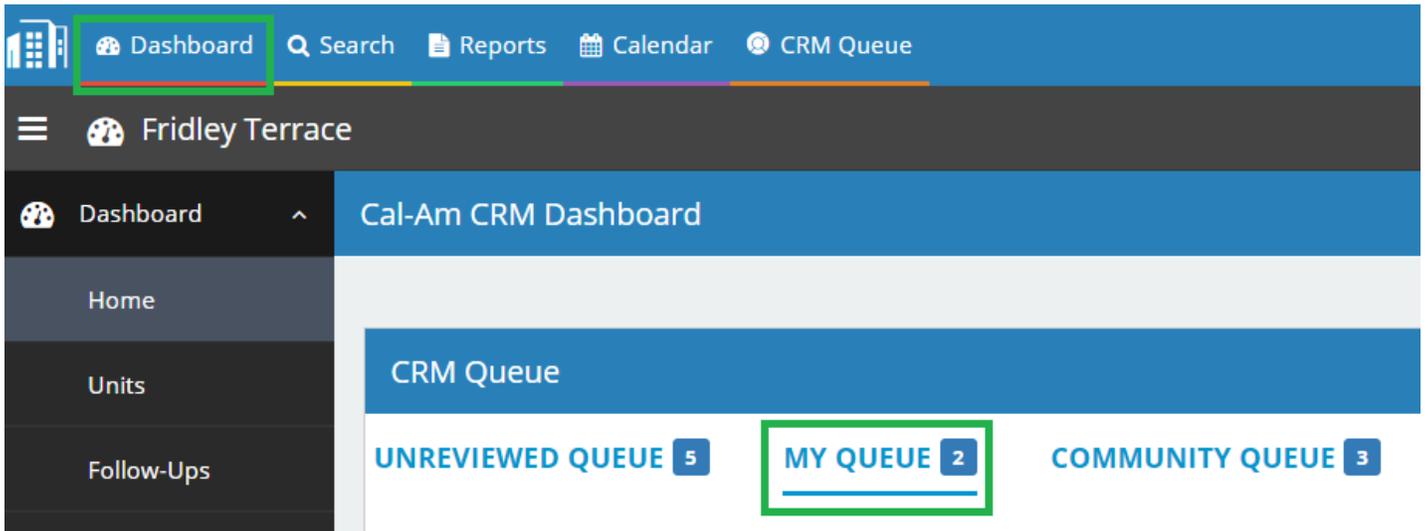
Expected Move In
Bedrooms 0
Desired Rent 0.00
Occupants 0
Pets 0

- Matched Guests

IX. Dashboard My Queue/Community Queue

This second part of the dashboard is where you can review your Follow-Ups scheduled for the current day, and also see all Follow-Ups scheduled for all agents on a particular day.

1. Click on “Dashboard” in the top menu then click on “My Queue” in the upper left of the screen.



2. Review the Follow-Ups for the current day, and to begin working on one click on the blue arrow at the right of the screen.

The screenshot shows a table of follow-up activities. The table has columns for Activity Type, Date, Contact Information, Agent Name, Name, Type, Marketing Source, and Property. Two rows are visible, both with blue arrows on the right side, one of which is highlighted in a green box.

Activity Type	Date	Contact Information	Agent Name	Name	Type	Marketing Source	Property	
Followup - SMS	10/25/2019 6:00 PM	(901) 650-4879	Brent Oberlin	Pascal Siakam	Prospect	Outdoor: Banner	Fridley Terrace	
Followup - Call	10/25/2019 5:45 PM		Brent Oberlin	Fred VanVleet	Prospect	Outdoor: Banner	Fridley Terrace	

3. This will take you directly to the “Follow-Ups” tab on the guest page, and highlight in yellow the particular Follow Up you selected.

Activity Logs | **Follow-Ups** | Appointments | Emails | SMS | API Leads | Add Activity

Q

Due Date	Complete Date	Event	Type	Description	Notes	Agent	Active	Deactivated By	Auto Send	Complete & Go To Queue	Link Emails
12/27/2019 12:15 PM		First Contact	Email	Follow-Up Email 4 - Promos		Brent Oberlin					
11/15/2019 12:15 PM		First Contact	Email	Follow-Up Email 3 - Benefits +		Brent Oberlin					
10/29/2019 12:15 PM		First Contact	Email	Follow-Up Email 2 - Promos + F		Brent Oberlin					
10/28/2019 12:15 PM		First Contact	Call	Follow-Up Call 2 - Schedule Ap		Brent Oberlin					
10/27/2019 12:15 PM		First Contact	SMS	Follow-Up Text 1		Brent Oberlin					
10/26/2019 12:15 PM		First Contact	Call	Call Center Follow Up - Schedu		Brent Oberlin					
10/25/2019 5:45 PM		Call		Fred mentioned he'll be discussing the home purchase with his wife today. Call to ask		Brent Oberlin					

4. Review the notes for the Follow-Up and then do the following depending on how you are going to contact the guest:

- Call – Pick up your phone and call the guest. Make any new appointments you need to, then return to the Follow-Ups tab and click the Checkbox with arrow around it to mark this Follow-Up complete and return to the queue.

Activity Logs | **Follow-Ups** | Appointments | Emails | SMS | API Leads | Add Activity

Q

Due Date	Complete Date	Event	Type	Description	Notes	Agent	Active	Deactivated By	Auto Send	Complete & Go To Queue	Link Emails
12/27/2019 12:15 PM		First Contact	Email	Follow-Up Email 4 - Promos		Brent Oberlin					
11/15/2019 12:15 PM		First Contact	Email	Follow-Up Email 3 - Benefits +		Brent Oberlin					
10/29/2019 12:15 PM		First Contact	Email	Follow-Up Email 2 - Promos + F		Brent Oberlin					
10/28/2019 12:15 PM		First Contact	Call	Follow-Up Call 2 - Schedule Ap		Brent Oberlin					
10/27/2019 12:15 PM		First Contact	SMS	Follow-Up Text 1		Brent Oberlin					
10/26/2019 12:15 PM		First Contact	Call	Call Center Follow Up - Schedu		Brent Oberlin					
10/25/2019 5:45 PM		Call		Fred mentioned he'll be discussing the home purchase with his wife today. Call to ask		Brent Oberlin					

- SMS – Go to the SMS tab, send your SMS message, then return to the Follow-Ups tab and click the checkbox with arrow mark next to this Follow-Up (see previous screen shot).
- Email – Go to the Emails tab and click “+ Add Email”. When creating your email message (see section II), also complete the “Link Followup” box with the date/time of the follow up you’re completing. After sending, you must return to the Dashboard manually.

Activities ✕ Clear ➔ Send 🗒 Preview 🗒 Insert Template 🗒 Save Email

Activity Logs Follow-Ups Appointments Emails SMS API Leads **Add Activity**

Type

To X

Cc

Subject X

Template

Attachment X

No file chosen

Link Followup X

- You can also click on the “Community Queue” in step 1, which will show a list of ALL Follow-Ups for all guests at the property, regardless of agent. This can be used to cover for someone that is out of the office.

CRM Queue

UNREVIEWED QUEUE 5 **MY QUEUE** 2 **COMMUNITY QUEUE** 3

ALL Prospects Applicants Residents

All 3 Appointments 0 Follow-Ups 3 Prospects without Active Follow-Ups 0

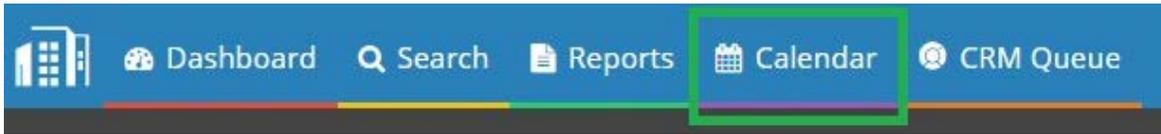
🔍

Activity Type	Date	Contact Information	Agent Name	Name	Type	Marketing Source	Property	
Followup - SMS	10/25/2019 6:00 PM	(901) 650-4879	Brent Oberlin	Pascal Siakam	Prospect	Outdoor: Banner	Fridley Terrace	
Followup - Any	10/25/2019 6:00 PM	(714) 422-5997	Jessica Bowers	Kawhi Leonard	Prospect	Digital: Cal-Am Website	Fridley Terrace	
Followup - Call	10/25/2019 5:45 PM		Brent Oberlin	Fred VanVleet	Prospect	Outdoor: Banner	Fridley Terrace	

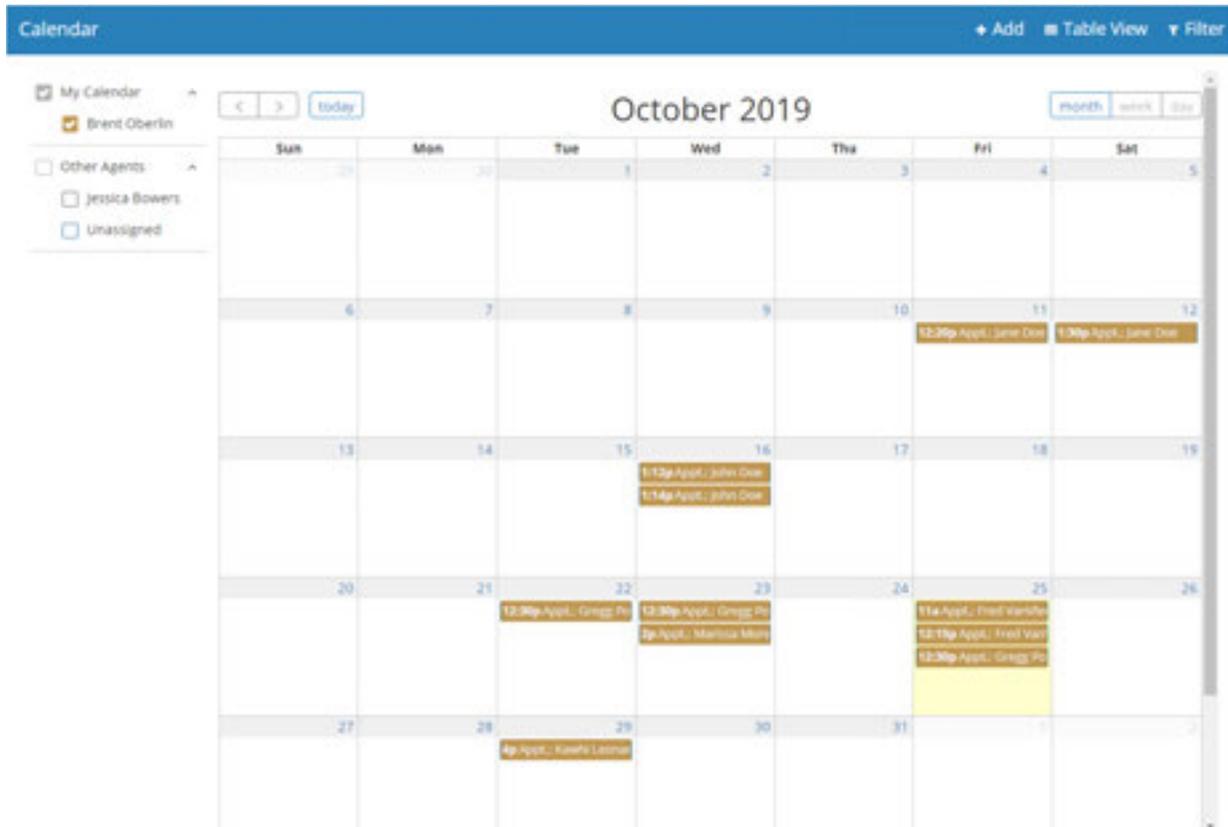
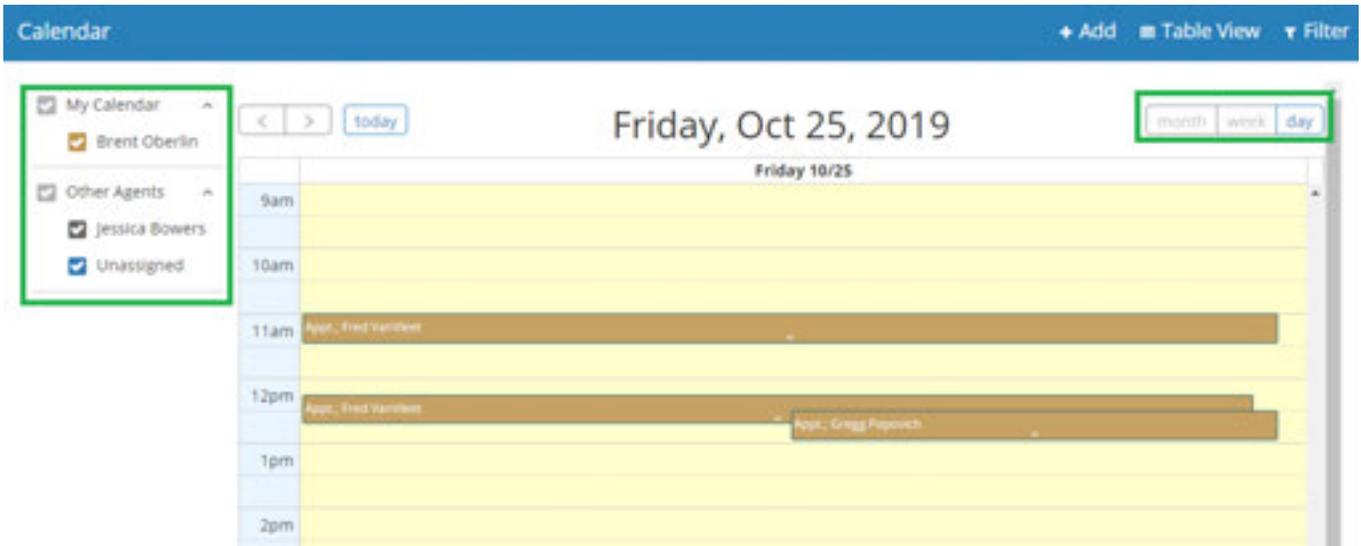
CRM Calendar

The Calendar is where you will see all scheduled appointments and past showings.

6. Click on “Calendar” in the top menu.



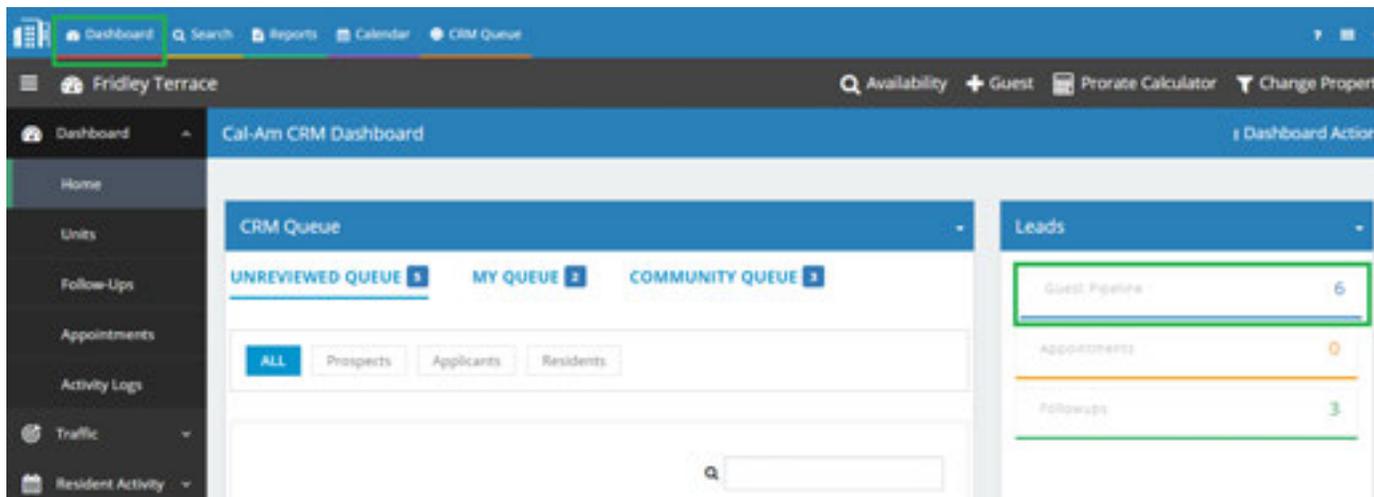
7. By default, the Calendar will show all appointments for all agents for the current day. This can be adjusted by checking/unchecking boxes on the left side to filter by agent and selecting different date ranges in the upper right.



X. Dashboard Pipeline

When you need to find a specific guest to review, contact, or add follow-ups to, you can find them using the Pipeline.

1. Click on “Dashboard” in the top menu, then click on “Guest Pipeline” on the right side of the screen.



2. This will display a list of all active guests at the property, along with information on when the last contact or last scheduled follow up with them is, some basic information, and the notes from the last time they were contacted.

A few notes:

- You can click on their name to go directly to their guest page.
- You can part of a name in the search bar in the upper right to filter the list by name

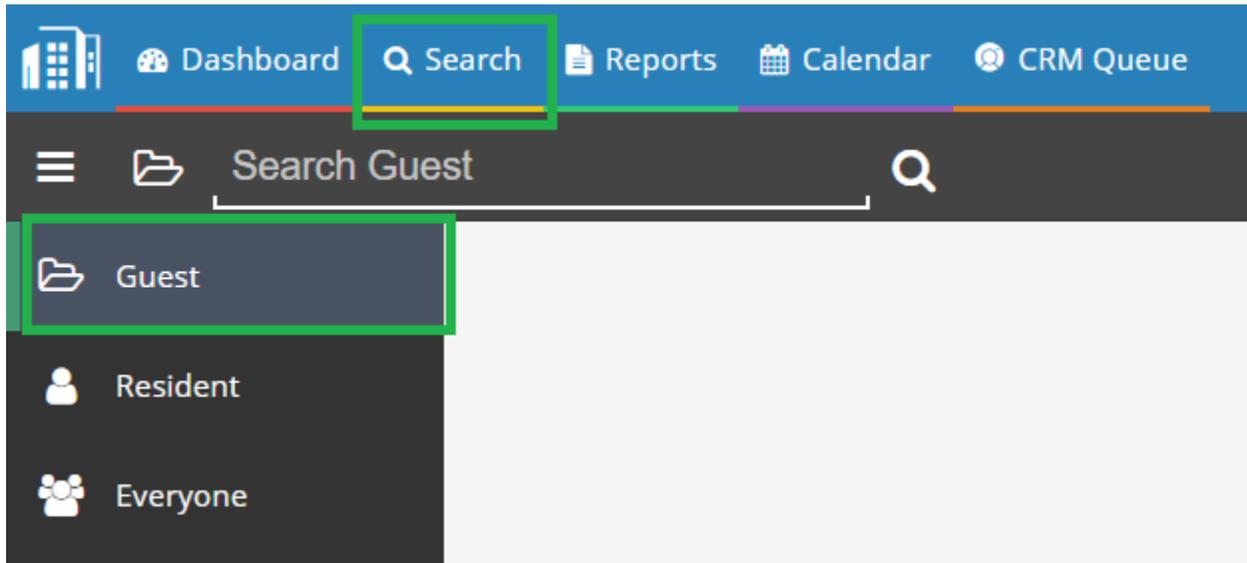
The screenshot shows the 'Guest Pipeline' table. A search bar in the top right is highlighted with a green box. The table has columns for Agent, Guest, Last Contact Date/Scheduled Date, Contact Type, Unit Type, Unit, Expected Move In, Make Appt, and Notes. The 'Guest' column is highlighted with a green box.

Agent	Guest	Last Contact Date/Scheduled Date	Contact Type	Unit Type	Unit	Expected Move In	Make Appt	Notes
Jessica Bowers	Valentin Flores	10/17/2019	Walk-in			11/1/2019	Make Appt	First Contact
Brent Oberlin	Kawhi Leonard	12/31/2019	Follow Up			11/1/2019	Make Appt	Send Kawhi information he requested about some amenities.
Brent Oberlin	Fred VanVleet	12/27/2019	Follow Up			11/1/2019	Make Appt	Fred mentioned he'll be discussing the home purchase with his wife today. Call to ask what their feelings are and if they have any questions.
Brent Oberlin	Pascal Siakam	12/27/2019	Follow Up			11/1/2019	Make Appt	Send a text to Pascal asking if he has any additional questions after our tour from today.
Brent Oberlin	John Curry	1/18/2020	Email			11/1/2019	Make Appt	Requested info on Fridley Terrace
Jessica Bowers	Joseline Barrea Ruiz	10/21/2019	Walk-in	1x101	J307	11/1/2019	Make Appt	First Contact

XI. Detailed Guest Search

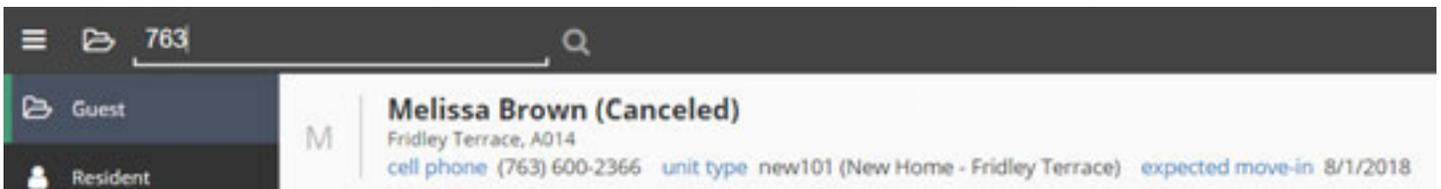
To search for guests using any piece of contact information, such as email address and phone number, you can use the detailed Search function.

1. Click on "Search" in the upper top menu, then click on "Guest" in the left menu.



2. In the "Search Guest" box, you can type any piece of information you have to bring up all guests that have that criteria in part of their profile. Even canceled guests will be included in this list. Clicking on the resident name will bring you to their guest page.

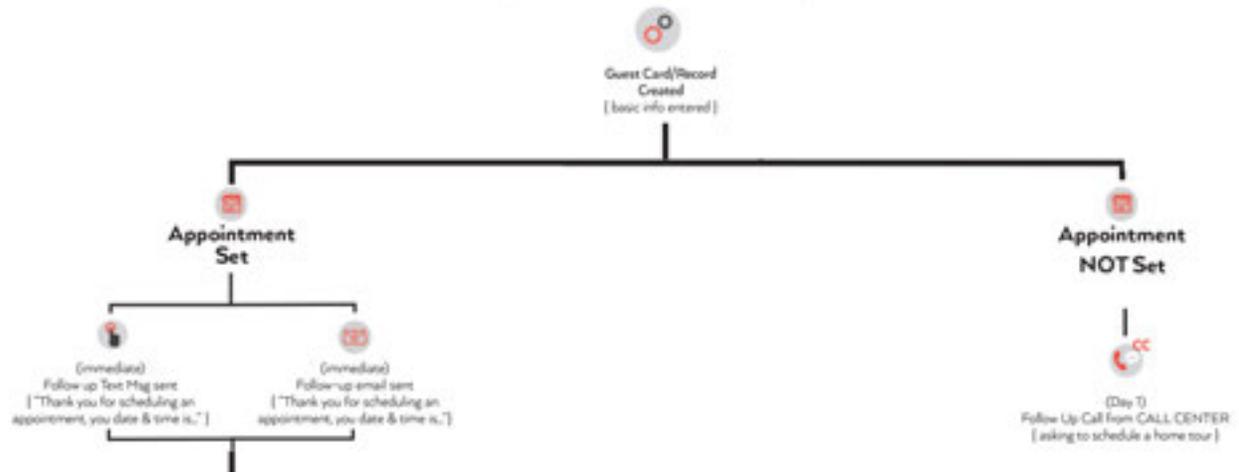
In the below example, the search is for 763, an area code, and pulls up a resident that matches.



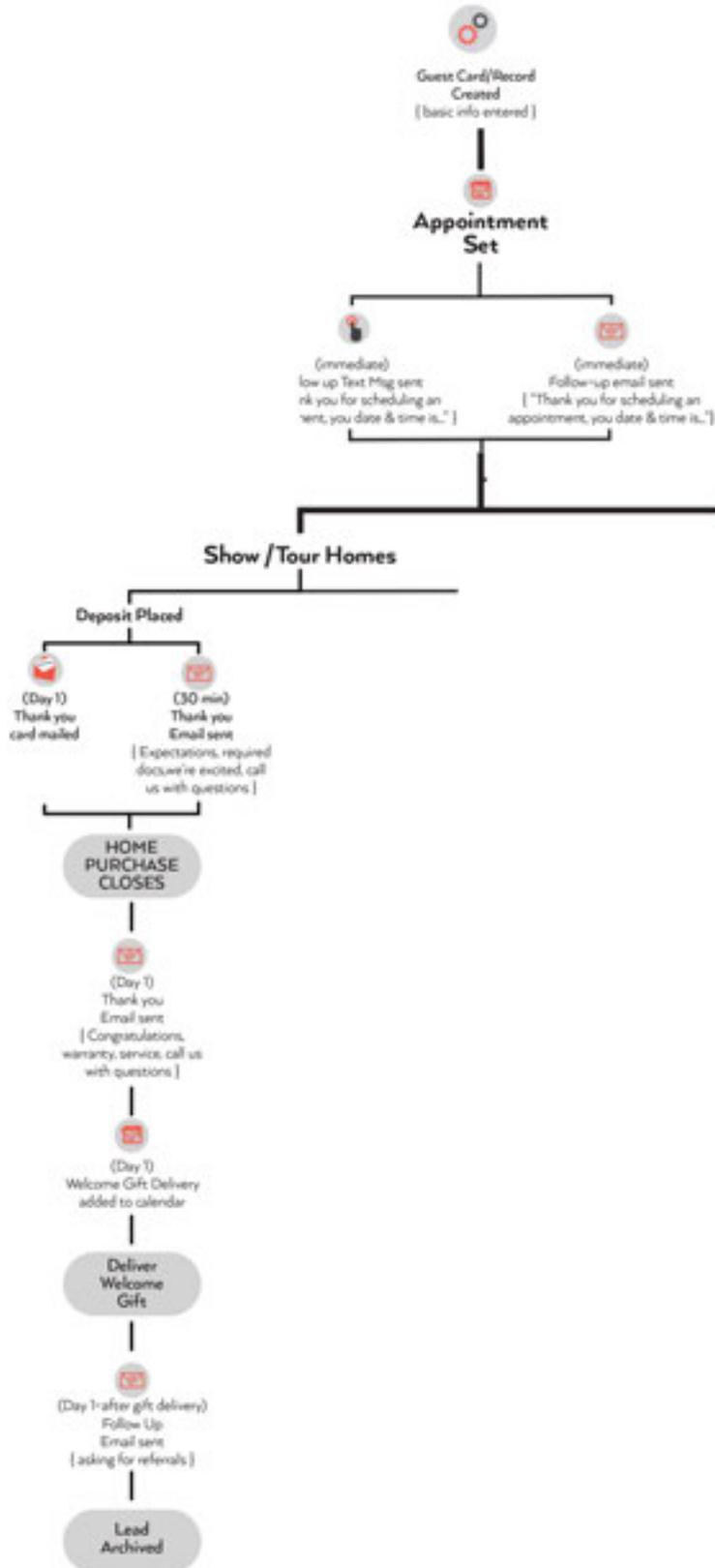
APPENDIX

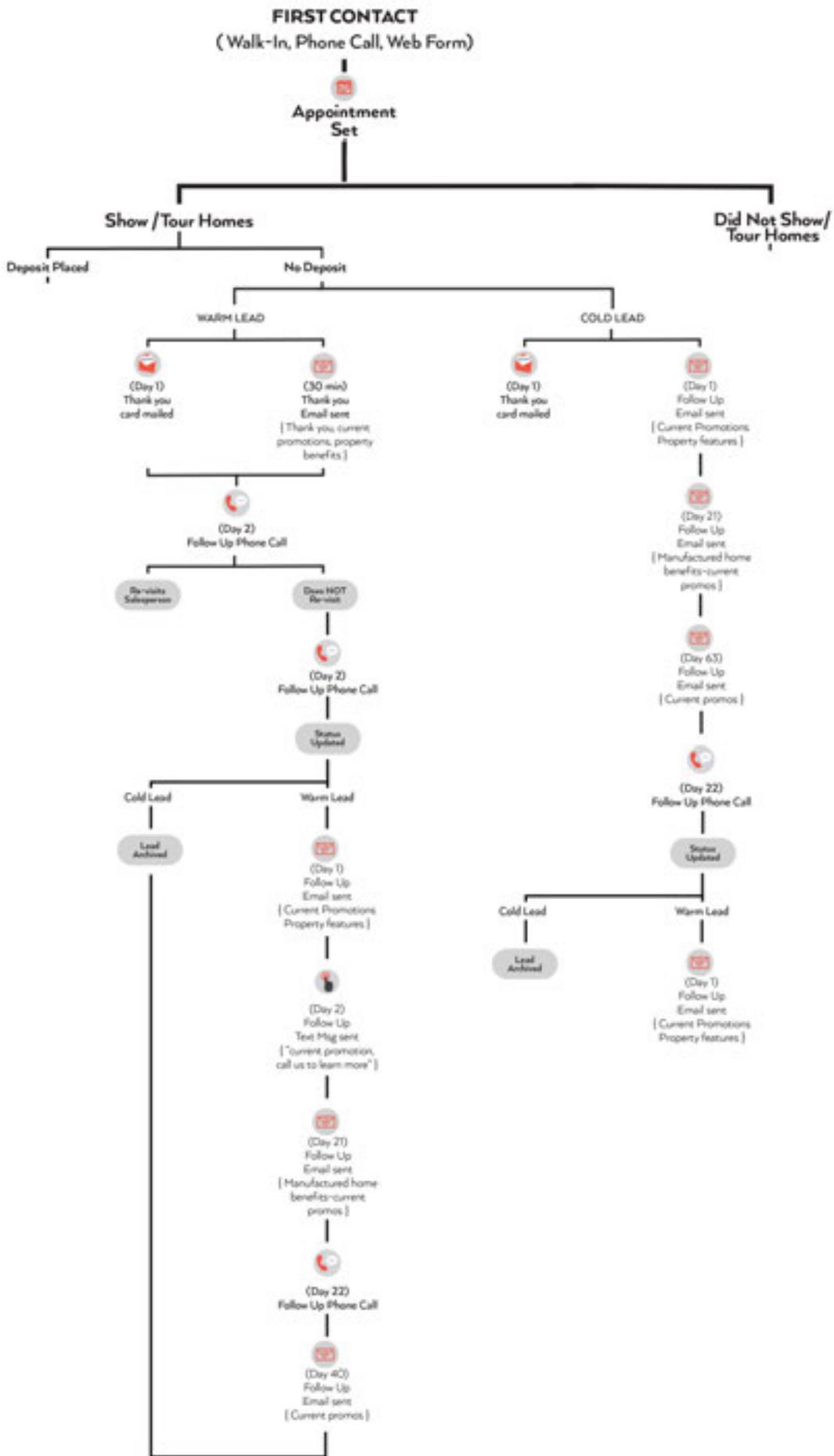
Workflow diagrams
Email auto response messages
SMS Text messages

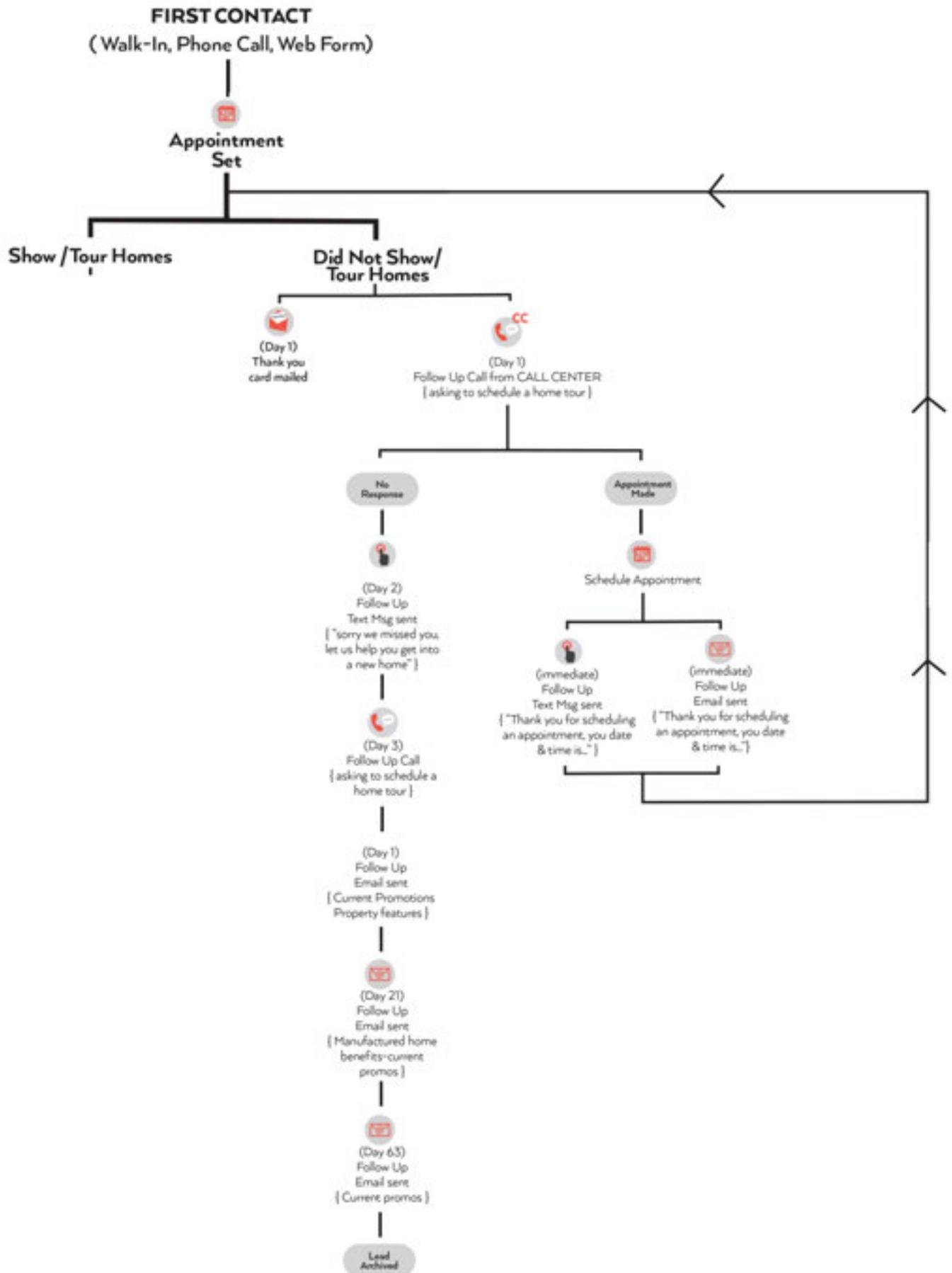
FIRST CONTACT
(Walk-In, Phone Call, Web Form)



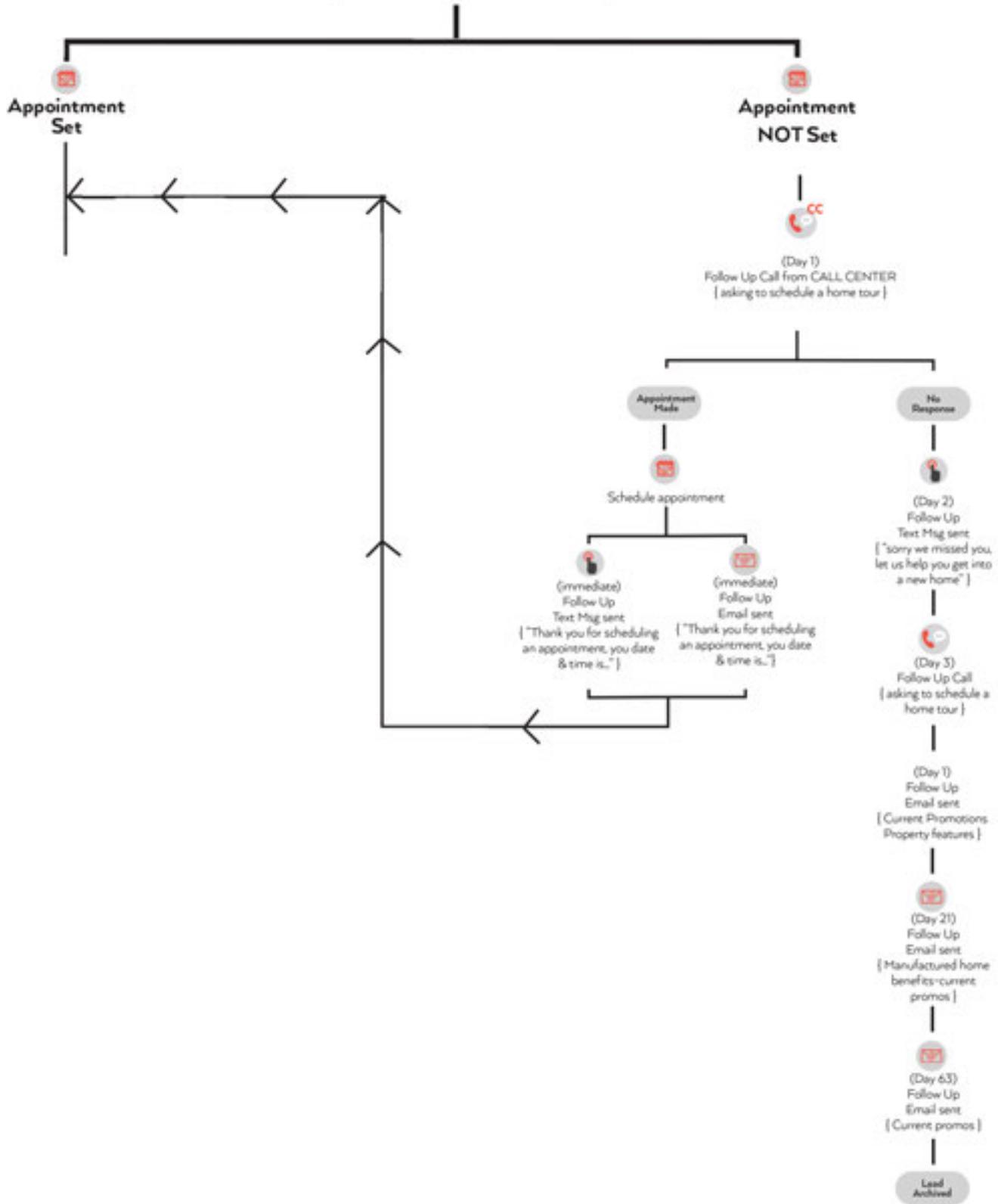
FIRST CONTACT (Walk-In, Phone Call, Web Form)







FIRST CONTACT (Walk-In, Phone Call, Web Form)



Email Auto Response Messages
**Appointment Set/
Home Showed**

APPOINTMENT SET - Follow Up

SUBJECT: We're excited to give you a tour of our community & homes

Hello [first name],

Thank you for scheduling time to see our homes for sale. Our on-site team is excited to meet you and learn more about your housing needs. You scheduled time is:

[Day, Date]

[Time]

We are eager to give you a tour of our community and the homes we currently have for sale. Once you see our amenities and learn more about today's manufactured home, we're sure you'll be pleased you came by.

If you have any questions prior to your appointment, please call us at [salesperson's phone].

Sincerely,

[Salesperson's full name]

[Community Name]

.....
SHOW HOME - Deposit Placed - Thank You

SUBJECT: Thank you for choosing us

Hello [first name],

From all of us at [property name] and Cal-Am Homes, thank you for placing your housing decision with us. We are excited to have you as part of our family and will be with you every step of the way as we close this home purchase.

Our sales representative discussed all of the documents that will be required to close. Here's the steps you can expect:

<<<Sales Steps>>>

If you have any questions, please feel free to contact us at [salesperson's phone].

Welcome Home!

Sincerely,

[Salesperson's full name]

[Community Name]

SHOW HOME - Deposit Placed - Purchase Close - Thank You

SUBJECT: Welcome to the family

Welcome [first name]!

Congratulations and welcome to the family! All of us at [property name] are so happy you chose our community to call home. Our front office staff is available to answer your questions and fill you in on the amenities, events and activities available as part of living here.

Your home sales representative is also available to answer questions about your house. For questions about your home warranty, please call your home warranty company

Thank you again for putting your trust in [property name] and Cal-Am Homes. We're here every day to welcome you home.

Sincerely,

[Community Manager's full name]

[Community Name]

.....

SHOW HOME-Deposit Placed - Purchase Close - after gift delivery

SUBJECT: I hope you enjoyed our Welcome gift

I hope you enjoyed the Welcome Gift we delivered. Have you had an opportunity to use some of our amenities or participate in our activities? Our goal is to provide a pleasant community to live with plenty of ways to stay active and make new friends.

If you are happy with your home purchase experience, please feel free to share your experience on YELP or Google. And as always, we welcome feedback to learn if there's anything we can do to improve our process.

Also, if you know of any friends or family who would benefit from buying a home like yours, please let me know. For every referral you bring who buys a new home at [property name], we'll give you 2 month's credit toward your lifestyle fee. That's a savings of over \$1,500 just for spreading the word. To learn more, call me at [salesperson's phone].

Welcome Home!

Sincerely,

[Salesperson's full name]

[Community Name]

SHOW HOME-NO Deposit Placed - Warm Lead – Thank You Email

SUBJECT: It was nice to meet you [FIRST NAME]

Thank you for your time today. It was a pleasure meeting you, and I hope you enjoyed your visit to our community. Looking for a new home can at times feel overwhelming, and there are many factors to consider when making your decision. I am here to help and will be with you all along the process. If there were features missing in the homes we toured, please let me know. We have numerous home solutions and we might have another home that would be a better fit.

<<<Sample promo text>>>

We also have the exciting promotion going for new home purchases. If you purchase a new home by September 30, 2019, you can take advantage of 3.99% financing and put only \$5,000 down payment (On Approved Credit). We'll also give you a free iPad or Chromebook when you close. **<<<end sample promo text>>>**

And don't forget all the amenities and activities we talked about. Those are all included in your monthly Lifestyle Fee.

Please feel free to call me if you have any questions. I'm confident we can find the right home for you.

Sincerely,

[Salesperson's full name]

[Community Name]

.....

SHOW HOME-NO Deposit Placed - Warm Lead – Follow Up after Status update to Warm Lead (Day2)

SUBJECT: Hi [LEAD'S FIRST NAME], how is your home search coming along?

Hello [first name]

I wanted to follow up and see how your search for a new home was going. We still have options available at [property name] and would like to reconnect to talk about them

<<<Sample promo text>>>

We also still have the great 3.99%, 5,000 down payment promotion going for new home purchases (on approved credit). But that program ends September 30, 2019. And if you close by the end of September we'll give you a free iPad or Chromebook. **<<<end sample promo text>>>**

Please contact me if you would like to re-visit our community to see the homes again or if you have any questions I can answer.

Sincerely,

[Salesperson's full name]

[Community Name]

SHOW HOME-NO Deposit Placed - Warm Lead – Follow Up after Status update to Warm Lead (Day 21)

SUBJECT: Here's a few more reasons to buy your home at {PROPERTY NAME}

Hello [first name]

It's been a couple weeks since we spoke and I wanted to see if there is a time to catch up about the homes we have at [property name]. We have a great promotion running that I don't want you to miss out on.

<<<Sample promo text>>>

Get a free iPad or Chrome book when you purchase a new home by September 30. Plus I can still get you 3.99% financing with only \$5,000 down payment (on approved credit). That's a hard deal to beat!

Even without these offers, our new homes are great places to live with features like:

- Beautiful Kitchens
- New Appliances
- Modern, Open Floor Plans
- Recessed Lights
- Walk-In Closets
- Energy saving insulation & windows
- Laundry Room
- And more!

<<<end sample promo text>>>

Please contact me if you have any questions I can answer. I'm sure we can find the best home for you!

Sincerely,

[Salesperson's full name]

[Community Name]

.....

SHOW HOME-NO Deposit Placed - Warm Lead – Follow Up after Status update to Warm Lead (Day 40)

SUBJECT: Reaching out one more time about our homes at [PROPERTY NAME]

Hello [first name]

I just wanted to reach out one more time and see if you wanted to take advantage of the amazing deals and great homes we have at [property name]

<<<Sample promo text>>>

I can also give you a free iPad or Chrome book when you purchase a new home by September 30. Plus we can offer 3.99% financing with only \$5,000 down payment (on approved credit). <<<end sample promo text>>>

Please contact me if you have any questions I can answer. A beautiful home is just waiting for you.

Sincerely,

[Salesperson's full name]

[Community Name]

SHOW HOME-NO Deposit Placed - COLD Lead – Follow Up Email (Day 1)

SUBJECT: It was nice meeting you today [FIRST NAME]

Thank you for your time today. It was a pleasure meeting you and I hope you enjoyed your visit to our community. Looking for a new place to live can be hard but just remember that I am here to help any way I can. If there is anything about the homes we toured that you have questions about, please let me know.

<<<Sample promo text>>>

We also have the exciting promotion going for new home purchases. If you purchase a new home by September 30, 2019, you can take advantage of 3.99% financing and put only \$5,000 down payment (On Approved Credit). We'll also give you a free iPad or Chromebook when you close. <<<end sample promo text>>>

And don't forget all the amenities and activities we talked about. Those are all included in your monthly Lifestyle Fee.

Please feel free to call me if you have any questions. I'm confident we can find the right home for you.

Sincerely,

[Salesperson's full name]

[Community Name]



SHOW HOME-NO Deposit Placed - COLD Lead – Follow Up Email (Day 21)

SUBJECT: Hi [LEAD’S FIRST NAME], how is your home search coming along?

Hello [first name]

It’s been a couple weeks since we spoke and I wanted to see if there is a time to catch up about the homes we have at [property name]. We have a great promotion running that I don’t want you to miss out on.

<<<Sample promo text>>>

Get a free iPad or Chrome book when you purchase a new home by September 30. Plus I can still get you 3.99% financing with only \$5,000 down payment (on approved credit). That’s a hard deal to beat!

Even without these offers, our new homes are great places to live with features like:

- Beautiful Kitchens
- New Appliances
- Modern, Open Floor Plans
- Recessed Lights
- Walk-In Closets
- Energy saving insulation & windows
- Laundry Room
- And more!

<<<end sample promo text>>>

Please contact me if you have any questions I can answer. I’m sure we can find the best home for you!

Sincerely,

[Salesperson’s full name]

[Community Name]



SHOW HOME-NO Deposit Placed - COLD Lead – Follow Up Email (Day 63)

SUBJECT: Reaching out about our homes at [PROPERTY NAME]

Hello [first name]

I just wanted to reach out and see if you wanted to take advantage of the amazing deals and great homes we have at [property name]

<<<Sample promo text>>>

I can also give you a free iPad or Chrome book when you purchase a new home by September 30. Plus we can offer 3.99% financing with only \$5,000 down payment (on approved credit). <<<end sample promo text>>>

Please contact me if you have any questions I can answer. A beautiful home is just waiting for you.

Sincerely,

[Salesperson's full name]

[Community Name]

SHOW HOME-NO Deposit Placed - COLD Lead – Follow Up Email after status update to WARM (Day 1)

SUBJECT: It was great catching with you

I'm glad that you are still interested in a home at [property name]. As always, I'm available to help in your home purchase decision. If you would like, we can schedule another time to come and look at the community again. We can even look at those homes you were interested in.

<<<Sample promo text>>>

We still have great promotions for new home purchases. If you purchase a new home by September 30, 2019, you can take advantage of 3.99% financing and put only \$5,000 down payment (On Approved Credit). We'll also give you a free iPad or Chromebook when you close. <<<end sample promo text>>>

And don't forget all the amenities and activities we talked about. Those are all included in your monthly Lifestyle Fee.

Please feel free to call me if you have any questions. I'm confident we can find the right home for you.

Sincerely,

[Salesperson's full name]

[Community Name]



**Email Auto Response Messages
Appointment Set/
Did NOT Show Home**

APPOINTMENT SET – Did not show/No Response / Follow up Email (Day1)

SUBJECT: Can we reschedule a tour of our community & homes?

Hello [first name],

We would like to reschedule a time for a community and home tour at [PROPERTY NAME]. Our on-site team is excited to meet you and learn more about your housing needs. Once you see our amenities and learn more about today's manufactured home, we're sure you'll be pleased you came by.

Please call me at [salesperson's phone] or email [salesperson's email] to book your private tour. We'll pick a time that works best with your schedule.

Sincerely,

[Salesperson's full name]

[Community Name]

.....
APPOINTMENT SET – Did not show/No Response / Follow up Email (Day21)

SUBJECT: Hi [LEAD'S FIRST NAME], how is your home search coming along?

I'm still available to show you the great deals on homes here at [PROPERTY NAME]. We also have a money-saving promotion running that I don't want you to miss out on.

<<<Sample promo text>>>

Get a free iPad or Chrome book when you purchase a new home by September 30. Plus I can still get you 3.99% financing with only \$5,000 down payment (on approved credit). That's a hard deal to beat!

Even without these offers, our new homes are great places to live with features like:

- Beautiful Kitchens
- New Appliances
- Modern, Open Floor Plans
- Recessed Lights
- Walk-In Closets
- Energy saving insulation & windows
- Laundry Room
- And more!

<<<end sample promo text>>>

Please call me so we can find a time to meet. I'm sure we can find the best home for you!

Sincerely,

[Salesperson's full name]

[Community Name]

APPOINTMENT SET – Did not show/No Response / Follow up Email (Day 63)

SUBJECT: Reaching out one more time about our homes at [PROPERTY NAME]

Hello [first name]

I just wanted to reach out one more time and see if we could take advantage of the amazing deals and great homes we have at [property name]

<<<Sample promo text>>>

I can also give you a free iPad or Chrome book when you purchase a new home by September 30. Plus we can offer 3.99% financing with only \$5,000 down payment (on approved credit).

<<<end sample promo text>>>

Please call me so we can find a time to meet. A beautiful home is just waiting for you.

Sincerely,

[Salesperson's full name]

[Community Name]

.....

APPOINTMENT SET - Did not show/Appointment Made

SUBJECT: Thank you for rescheduling your home tour at [PROPERTY NAME]

Hello [first name],

Thank you for re-scheduling a time to see our homes for sale. I'm excited to meet you and learn more about your housing needs. As a reminder, your scheduled time is:

[Day, Date]

[Time]

We are eager to give you a tour of our community and the homes we currently have for sale. Once you see our amenities and learn more about today's manufactured home, we're sure you'll be pleased you came by.

If you have any questions prior to your appointment, please call me at [salesperson's phone].

Sincerely,

[Salesperson's full name]

[Community Name]

**Email Auto Response Messages
Appointment NOT Set**

APPOINTMENT NOT SET - Appointment Made

SUBJECT: Thank you for scheduling your home tour at [PROPERTY NAME]

Hello [first name],

All of us at [PROPERTY NAME] are excited to meet you and learn more about your housing needs. As a reminder, your scheduled time is:

[Day, Date]

[Time]

We are eager to give you a tour of our community and the homes we currently have for sale. Once you see our amenities and learn more about today's manufactured home, we're sure you'll be pleased you came by.

If you have any questions prior to your appointment, please call me at [salesperson's phone].

Sincerely,

[Salesperson's full name]

[Community Name]

.....

APPOINTMENT NOT SET –No Response / Follow up Email (Day1)

SUBJECT: Can we schedule a tour of our community & homes?

Hello [first name],

We would like to schedule a time for a community and home tour at [PROPERTY NAME]. Our on-site team is excited to meet you and learn more about your housing needs. We also have a money-saving promotion running that I don't want you to miss out on.

<<<Sample promo text>>>

Get a free iPad or Chrome book when you purchase a new home by September 30. Plus I can still get you 3.99% financing with only \$5,000 down payment (on approved credit). That's a hard deal to beat!

<<<end sample promo text>>>

Once you see our amenities and learn more about today's manufactured home, we're sure you'll be pleased you came by.

Please call me at [salesperson's phone] or email [salesperson's email] to book your private tour. We'll pick a time that works best with your schedule.

Sincerely,

[Salesperson's full name]

[Community Name]

.....

APPOINTMENT NOT SET –No Response / Follow up Email (Day21)

SUBJECT: Hi [LEAD’S FIRST NAME], how is your home search coming along?

I’m still available to show you the great deals on homes here at [PROPERTY NAME]. We also have a money-saving promotion running that I don’t want you to miss out on.

<<<Sample promo text>>>

Get a free iPad or Chrome book when you purchase a new home by September 30. Plus I can still get you 3.99% financing with only \$5,000 down payment (on approved credit). That’s a hard deal to beat!

Even without these offers, our new homes are great places to live with features like:

- Beautiful Kitchens
- New Appliances
- Modern, Open Floor Plans
- Recessed Lights
- Walk-In Closets
- Energy saving insulation & windows
- Laundry Room
- And more!

<<<end sample promo text>>>

Please call me so we can find a time to meet. I’m sure we can find the best home for you!

Sincerely,

[Salesperson’s full name]

[Community Name]



APPOINTMENT NOT SET –No Response / Follow up Email (Day 63)

SUBJECT: Reaching out one more time about our homes at [PROPERTY NAME]

Hello [first name]

I just wanted to reach out one more time and see if we could take advantage of the amazing deals and great homes we have at [property name]

<<<Sample promo text>>>

I can also give you a free iPad or Chrome book when you purchase a new home by September 30. Plus we can offer 3.99% financing with only \$5,000 down payment (on approved credit).

<<<end sample promo text>>>

Please call me so we can find a time to meet. A beautiful home is just waiting for you.

Sincerely,

[Salesperson's full name]

[Community Name]



SMS Text
Auto Response Messages

APPOINTMENT SET – Show/Tour Homes – No Deposit – Status Updated-Warm Lead (Day 2)

Great offers are still available at [PROPERTY NAME], call [SALESPERSON FIRST NAME] at [SALESPERSON'S PHONE] to see how we can save you money on your home purchase.

.....

APPOINTMENT SET – Did NOT Show/Tour Homes – No Response – Follow Up (Day 2)

Sorry we missed you. Please call [SALESPERSON'S FIRST NAME] at [SALESPERSON'S PHONE] to reschedule your home and community tour at [PROPERTY NAME]. Great money-saving offers are still available.

APPOINTMENT SET – Did NOT Show/Tour Homes – Appointment Made – Follow Up (immediate)

Thank you for rescheduling your appointment. Your home tour at [PROPERTY NAME] is set with [SALESPERSON FIRST NAME] for [APPOINTMENT DATE/TIME]. Please call [SALESPERSON'S PHONE] if you have any questions.

.....

APPOINTMENT NOT SET - Appointment Made

Your home tour at [PROPERTY NAME] is scheduled with [SALESPERSON FIRST NAME] for [APPOINTMENT DATE/TIME]. Please call [SALESPERSON'S PHONE] if you have any questions.

APPOINTMENT NOT SET –No Response / Follow up Email (Day2)

We're sorry we missed you. Please call [SALESPERSON'S FIRST NAME] at [SALESPERSON'S PHONE] to schedule your home and community tour at [PROPERTY NAME]