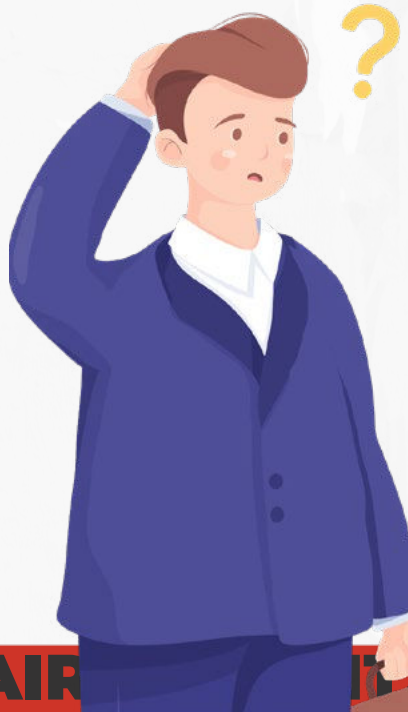
SALES & AUTOMATION WORKFLOW GUIDE

New Lead

Did They Schedule An Appointment?

- **NO** → Did They Respond To Any Of The Automated Messages?
  - **NO** → Call the lead immediately (3x within 24 hours) while letting our system follow up automatically
  - **YES** → How Did The Lead Respond?
    - Lead Responded via Call → Follow Our Phone Framework Schedule An Appointment
    - Lead Responded via SMS → Respond Using Our Text Framework. Get Them On the Phone
    - Lead Responded via Email → Respond Using Our Email Framework. Get Them to Schedule An Appointment
- **YES** → Scheduled Appointment







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Scheduled Appointment

Did You Connect With The Lead?

NO

Move To "No Show" To Reschedule

YES

Follow Our Phone Script Framework

- Small Talk
- Build Rapport
- Understand Their Situation
- Educate And Build Trust
- Qualify The Prospect

Are They Looking To Buy Soon?



NO

Move To "Not Yet Ready" for Long Term Nurture

YES

Do They Need Help Improving Credit?

YES

Move To "Credit Repair" To Help improve Credit

NO

Do They Have Access To Downpayment?

NO

Move To "Not Yet Ready" for Long Term Nurture

YES



Take Application Over The Phone

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Take Application Over The Phone

Gain Commitment To Send Their Documents



Did They Send Their Documents?

NO

Run “Docs Requested” Follow Up Campaign

YES



Schedule Secondary Appointment

- Small Talk
- Build Rapport
- Understand Their Situation
- Educate And Build Trust
- Qualify The Prospect

Move To “Pre-Approved” Stage



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