

Cheatsheet

Leads VS People

Contacts in active conversion.

Not actively buying or selling.

THINK Internet Leads, Open Houses, Prospective Clients

THINK Sphere, Collaborators, Other Agents, Your Team

Tags

Tags are completely custom. Tag clients to help you easily find those contacts. Good example tags are Sphere, Investor, Cash Buyer, Closed 2018, Pie Giveaway, or any other short word or phrase.

Intent

Brivity marks the Intent of leads as they come through from online sources. You can manually add/change intent.



Status

Set a status to identify when a contact wants to move.

New	Status unknown: A lead who has not yet been contacted
Unqual	Attempted contact, no response
Hot	Moving in 1-3 months
Watch	Moving in 3-6 months
Nurture	Moving in 6-12 months, or contacts you're nurturing
Pending	Client currently under contract
Past	Previous clients
Inactive	Not actively responsive
Trash	Bad/Fake contact information
Archive	Stop all contact (DNC)

NOTE Inactive, Archived, and Trash statuses will hide people from your list views unless you've filtered to find them