



Jeremy Forcier's Lead Tracker Protocol



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Lead Tracking Process:

1. Go into Salesforce and make sure lead doesn't exist
2. If not in Salesforce, enter new lead
3. Enter into Lead tracker
4. Call the lead to book appointment
5. Immediately send an email either confirming what was discussed or to book appointment
6. follows 1x every other day for one week. (3x total) Then 1x per week for eight weeks
7. If contact not made – task assigned will continue to follow up 1x per Month until contact has been made or borrower says NO (text follow up)
8. Lead tracker meeting Monday's at 3pm to review all leads (RLRT wed?)

Keys to Success:

- GREAT NOTES
- Task everything
- Meet 1x per week with Lo and LP1
- UPDATE Realtors when appointment made or lead non responsive to get more information
- HAVE FUN – make a game out of it

Legend for Lead tracker:

- **RED = dead**
- **GREEN = live deal in process**
- **Blue = Pre-Approved (no follow up needed as a lead)**
- **Orange= UW pre-approved**
- No color = has not been touched - needs action – not moving forward yet
- **BOLD = has been touched – contact made – in process no decision yet**