

DATABASE CHART OF ACCOUNTS

Capture, Code, Communicate

Groups

Mets: Someone who knows you and/or you know them

Connect: A new relationship that we have talked with and is less than 60 days old. Should be on an 8x8

Capture: A new relationship we generated but have not talked to or someone in our database that we have no ongoing relationship.

Status

Past Clients: A Met who has transacted with your team

SOI: A Met who has not transacted with your team

Vendor: A Met who helps or supports the team with goods or services

Relationship Ranking (all Mets)

Allied Resources: Multiple referrals per year

VIP: Met, repeat client, or 2+ referrals

Champion: Met that's given a referral or if a Past Client a review

Fan: Met w/ no review or referral but engages

Spectator: Met who never responds or participates

Pipeline: The place in our database where we are able to separate/identify those who have buyers, seller, or investor intent over the next 12 mos.

Leads: People who we have spoken with who have a real estate need in the next 6 mos.

Tagged as Seller, Buyer, or Investor and Nurture tag.

Motivation (A, B, C, D)

These are only for Leads and are based on when they will become a client.

A: Someone who intends to sign a listing agreement or buyer agreement this month.

B: Someone who intends to sign a listing agreement or buyer agreement next month

C: Someone who intends to sign a listing agreement or buyer agreement in 2 months

D: Someone who intends to sign a listing agreement or buyer agreement in 3+ months

Nurture: People we have spoken with who have a real estate need in the next 6-12 mos.