Weichert Lead Network

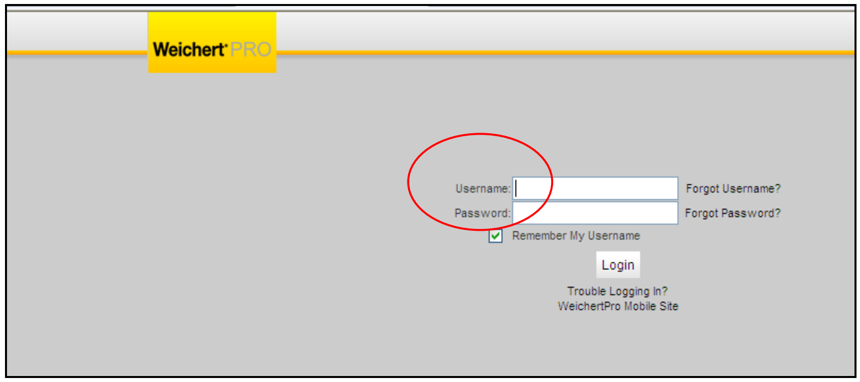
Participating in Call Sessions using WeichertPRO

Introduction

This easy to use guide provides information on how to participate in a Call Session using your WeichertPRO Account

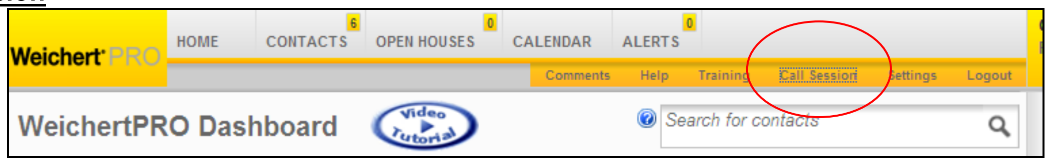
Getting started

Log into WeichertPRO



Joining a scheduled Call Session

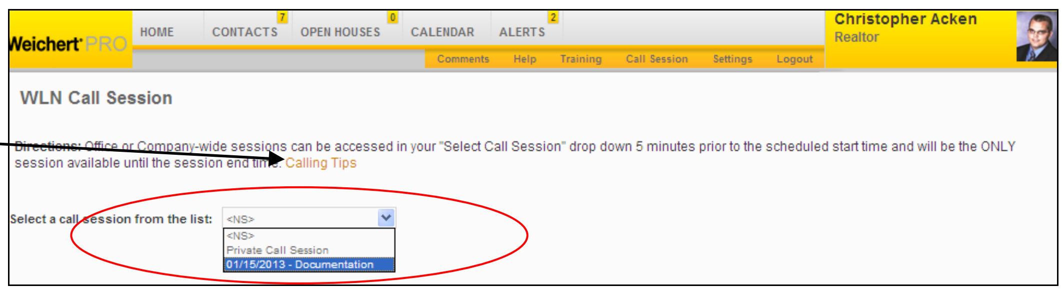
1. Click on the Call Session link at the top of the page



2. Select the appropriate Call Session from the dropdown.

Note: there is a link for calling tips on this page!

Note: If there is another Call Session in progress, it will also appear in the dropdown.



Note: Do Not Use Private Call Session when participating in office or Companywide Sessions.

Note: Call Sessions do not appear in the dropdown until 5 minutes prior to the starting time of the scheduled Call Session.

Note: The Call Sessions you are scheduled to participate in will appear about the “Select Call Session” drop down.

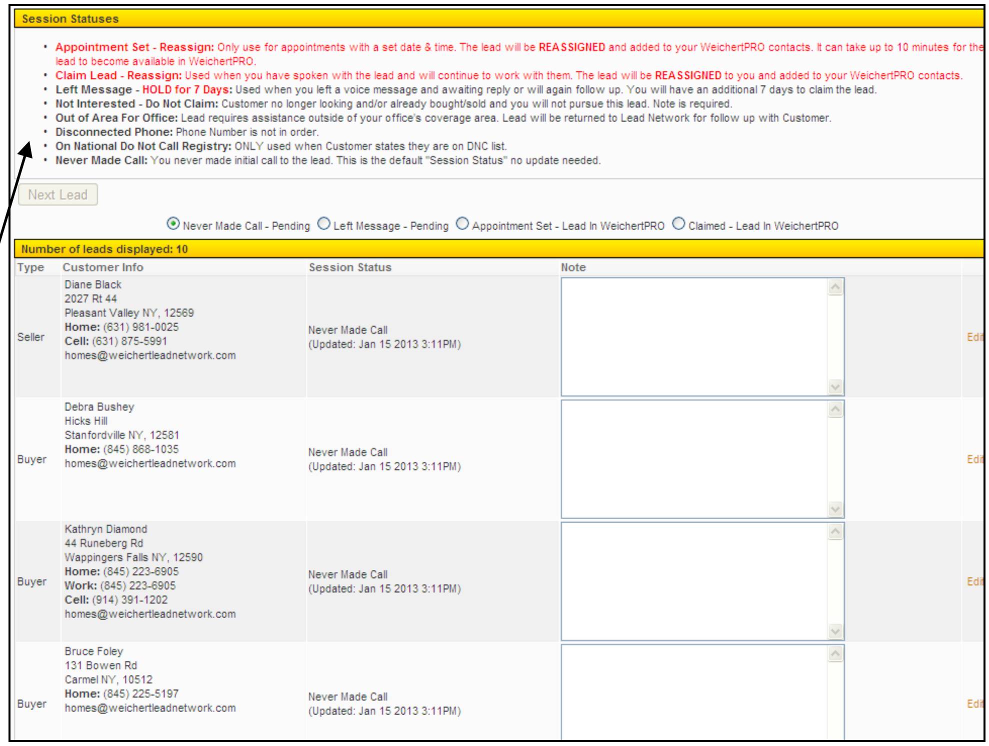
Accessing your leads

1. Once you select a Call Session a list of leads will appear

Note: If participating in a Call Session using a print out, return your edited printout to the Moderator so they can update accordingly

Note: Do not make calls from another attendees list. They will be moved into their WeichertPRO account not yours

Note: A legend explaining each "Session Status" will be available to you when editing leads.

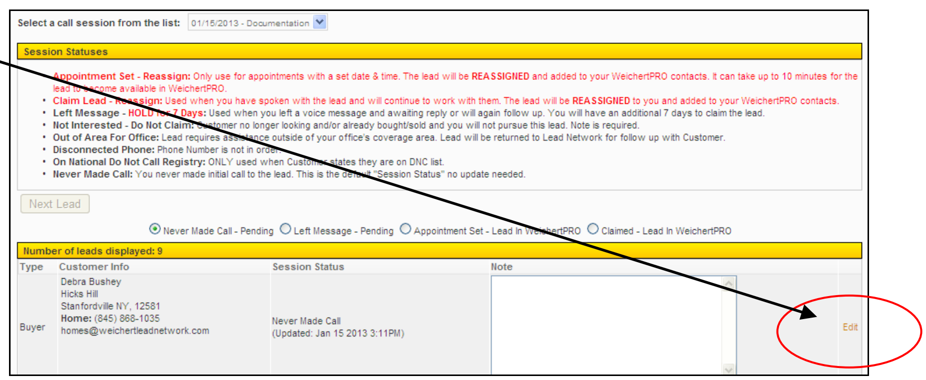


Managing your leads

1. Click " Edit" to update the status of your leads

Note: The "Session Status" for your lead is defaulted to "Never Made Call – Pending"

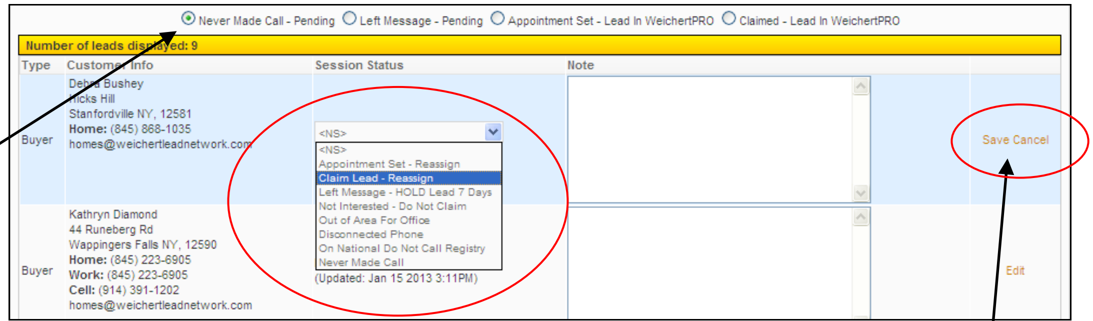
Note: a note will not be able to be entered until the edit button is clicked



Updating your leads

1. Update the "Session Status" of your lead and save or cancel the changes made to the lead

Note: Use the radio buttons to see the leads you have left a message for, set an appointment with and claimed



Note: Leads marked "Appointment Set" or "Claim Lead" are reassigned and added to your WeichertPRO contacts

Note: Leads marked "Left Message" will have a 7 day follow-up window. These leads can be accessed by call session and selecting "Private Call Session" from the dropdown and clicking on the "Left Message-Pending" radio button

Note: If for any reason you do not wish to save the changes you've made to the lead's "Session Status" click "Cancel"

Note: You must click "Save" to keep the new "Session Status" you have selected

Wrap up your leads

By changing the "Session Status", adding notes, and clicking "Save" for each lead you will be wrapping up your leads.

Session Status Options

- **Appointment Set - Reassign:** Only use for appointments with a set date & time. The lead will be REASSIGNED and added to your WeichertPRO contacts. It can take up to 10 minutes for the lead to become available in WeichertPRO
- **Claim Lead - Reassign:** Used when you have spoken with the lead and will continue to work with them. The lead will be **REASSIGNED** to you and added into your WeichertPRO contacts.
- **Left Message - HOLD for 7 Days:** Used when you left a voice message and awaiting reply or will again follow up. You will have an additional 7 days to claim the lead.
- **Not Interested - Do Not Claim:** Customer no longer looking and/or already bought/sold and you will not pursue this lead. Note is required.
- **Out of Area for Office:** Lead requires assistance outside of your office's coverage area. Lead will be returned to Lead Network for follow up with Customer.
- **Disconnected Phone:** Phone Number is not in order.
- **On National Do Not Call Registry:** ONLY used when Customer states they are on DNC list.
- **Never Made Call:** You never made initial call to the lead. This is the default "Session Status" no update needed.

Note: If you do not claim the lead by selecting "Appointment Set", "Left Message"-Hold for 7 days, or "Claim Lead" the lead will be distributed to another individual.

Note: Be sure to update all of your leads prior to the duration of the Call Session. Otherwise the results will not be included in the office totals and the unclaimed leads will be redistributed to other individuals.

Note: Leads marked “Appointment Set” or “Claim Lead” are reassigned and added to your WeichertPRO contacts

Note Leads marked “Left Message-Pending” will have a 7 day follow-up window

<u>Accessing “Left Message-Pending” Leads</u>

1. Log-in
2. Click the “Call Session” link on your home page
3. Select the appropriate Call Session from the dropdown
4. Click the “Left Message-Pending” radio button.
5. The leads will be displayed and are ready to be updated!