

When to update as “No longer working with this referral”

IF	THEN	WHEN
<ul style="list-style-type: none"> The customer is already committed to or is under agreement with an agent. 	<ul style="list-style-type: none"> Release 	<ul style="list-style-type: none"> Anytime
<ul style="list-style-type: none"> The customer has asked to unsubscribe and wants no further contact. 	<ul style="list-style-type: none"> Release 	<ul style="list-style-type: none"> Anytime
<ul style="list-style-type: none"> The customer does not meet the eligibility requirements to purchase. 	<ul style="list-style-type: none"> Release 	<ul style="list-style-type: none"> Anytime
<ul style="list-style-type: none"> The customer’s timeline to buy has changed. They need education on the buying process or have not spoken to a mortgage specialist. 	<ul style="list-style-type: none"> Update to “Nurturing” status in your dashboard and continue to reach out. 	<ul style="list-style-type: none"> If it is likely they will purchase in the future then DO <u>NOT</u> release.
<ul style="list-style-type: none"> You’ve been trying to reach them for 2 or 3 days, but they aren’t answering. 	<ul style="list-style-type: none"> Use the “Help with this Referral” button on the customer profile in your dashboard to get assistance from Houseful's concierge. 	<ul style="list-style-type: none"> Don’t give up on Day 2 - it usually takes between 7-10 touches before reconnecting with an online lead. Continue to follow up!
<ul style="list-style-type: none"> It is day 6 after winning the referral and the customer is still unresponsive. 	<ul style="list-style-type: none"> Option 1 – Keep the referral and continue to try and connect with them. It can be weeks or months before a referral responds to outreach. Option 2 – Update “No Longer Working with This Referral” and release them back to Houseful. 	<ul style="list-style-type: none"> You have 7 days to decide if you will continue to work with the referral. You should make every attempt to connect before releasing.
<ul style="list-style-type: none"> Things were going well initially, but the customer has stopped responding to your calls. 	<ul style="list-style-type: none"> After the 7th day since winning the referral, it is best to continue nurturing the lead and following up unless you are 100% certain the lead will not transact in the future. 	<ul style="list-style-type: none"> You can release the referral at any time by updating as “No Longer Working with This Referral.” Keep in mind that this makes the lead eligible for reassignment to another agent.