

MARCH 2021 | ISSUE 2

REC CONNECTOR

The Real Estate Connection Newsletter

REC DIRECT LEAD GENERATION

REC Direct Lead Generation provides a clear path for mortgage lender and Real Estate agents to get the most from the Lead Generation Process.

- REC Direct offers fully managed service with best practices buyer engagement and conversion
- REC Partners with the best in Lead Aggregators to get the highest quality buyer leads to our mortgage lending and real estate partners (i.e. Zillow, LendingTree, Bankrate, Google, Self-Generated).
- REC will integrate with your Loan Origination system, point of sale or CRM to ensure leads are engaged with and updated in real time.
- REC Connect transaction Management and call center support will ensure all leads are worked with consistency and Industry best practices.
- REC uses best practices in lead conversion strategies to maintain the buyers relationship and convert the buyers.
- REC assigns all buyer leads to hyper local qualified agents who will help the buyer begin the Home purchasing process.
- REC Partners with the best lenders in each market to facilitate the pre approval and funding of the purchase.

THIS WEEK'S FEATURED ARTICLES

-REC Direct
Lead Generation
-Portal and Updates

Benefits of REC Direct Lead Generation:

- Establish new "protected" Real Estate Agent Connections.
- Close more aged buyer leads- 4 months to 1+ years old.
- Performance Dashboard -Track ROI and engagement.
- Use REC's insights and analytics to improve performance.
- Stay up-to-date on each buyer lead's status with their Agent.
- REC's nationwide support team works your buyer leads.
- REC improves buyer lead quality with our proprietary data resources.
- REC works with lead aggregators to identify new lead opportunities on our behalf.

Let's keep in Mind to:

1. Acknowledge you received the lead
2. You were able to get in touch with buyer within 24-48 hour
3. Calling the lead
4. Update the lead through the portal from new lead to Called, Made Contact, Meeting or Working with Client or Sent to Lender.

Real Estate Connection Portal Update

The screenshot displays the Real Estate Connection Client Portal interface. The top navigation bar includes the 'REAL ESTATE CONNECTION' logo, 'CLIENT PORTAL', a 'Refer REC Deal' button, and a user welcome message 'Welcome, Dan Love'. The left sidebar contains a 'Dashboard' menu with options for 'Pipeline', 'Reporting / Analytics', and 'Resource Center'. The 'Pipeline' section is highlighted, showing 'REC Managed Leads (30)' and 'REC Managed Deals (1)'. The main content area features a 'Leads Pipeline' section with four status boxes: 'Active Pipeline (0)', 'Under Contract (0)', 'Deal Received (1)', and 'Lead Received (00)'. Below these are two performance tables: 'REC Lead Performance' and 'REC Deal Performance'. The 'REC Lead Performance' table shows stages 'New Lead' (18 leads, 58%) and 'Called' (7 leads, 23%). The 'REC Deal Performance' table shows 'On HOLD' (1 deal, 100%). A text box explains: 'Deals Pipeline consists of any lead that has a credit decision, for instance pre-qualified, looking at homes or under contract. Will also consist of any deal on hold for credit repair or any other reason.' At the bottom, a 'Most Recent Pipeline Updates' table lists details for a lead with REC Number REC3152, Buyer Name Test QA, State, Amount \$10, Stage On HOLD, Sub Stage Timeframe 90 Days or More, Follow-up Date 01/05/2021 01:23 AM, Lender Name TO BE DETERMINED, and an Update File button.

Stages	No. of Leads	Percentage
New Lead	18	58%
Called	7	23%

Stages	No. of Deals	Percentage
On HOLD	1	100%

REC Number	Buyer Name	State	Amount	Stage	Sub Stage	Follow-up Date	Lender Name	Action
REC3152	Test QA		\$10	On HOLD	Timeframe 90 Days or More	01/05/2021 01:23 AM	TO BE DETERMINED	Update File

1 Remember to check the Leads to the Portal.

REAL ESTATE CONNECTION CLIENT PORTAL

Dashboard

Pipeline

- REC Managed Leads (90)
- REC Managed Deals (1)

Reporting / Analytics

- Scorecard
- REC Performance Deal Dashboard
- Rec Deals by Loan-Officer/Rec Estate Agent
- HOT Leads Dashboard - ACTIONABLE

Resource CENTER

- View FAQ
- Create Ticket

Leads by Stage

REC Managed Leads

New Lead (06) **Called (07)** Made Contact (02) Meeting or Working with Client (01) Sent to Lender (00) Lost - has an agent (00) **REC Managed Deals**

Show 50 entries

Search:

Lead	Buyer	Area	Stage	Sub Stage	Created On	Lender	Action
HL282	Sergio Sanchez		Called	Opening Emails, Left Voicemail, Email Exchange	06/26/2020 13:12 PM	TO BE DETERMINED	Update File
HL257			Called	Opening Emails	06/22/2020 19:01	TO BE DETERMINED	Update File
HL244	Brian DiMaggio		Called	Left Voicemail	PM	TO BE DETERMINED	Update File
HL223	Marian Keysmith		Called	Left Voicemail	06/16/2020 22:05 PM	TO BE DETERMINED	Update File
					06/08/2020 14:45 PM	TO BE DETERMINED	Update File
					06/03/2020 14:01		Update File

2

You may be able to check the lead stage of the Hot Leads through the REC Management Lead bar. You can update and change the Lead stages from New Lead to Called, Made Contact, Meeting or Working with Client and Sent to Lender.

Update Stage Sub Stage Add Follow

Lead Name HL282

Stage: Called

Sub Stage: Favoriting Properties Online, Texting, Schedule d Appointment, Left Voicemail, Email Exchange

Follow-up Date: mm/dd/yyyy

Add Notes: **Quickly add Notes**

Notify All ☐

View Prior Notes

Notify REC, the Agent or LO of the new update

File Updated by Dan Love
Portal User(2020-11-06T20:49:47+05:00)
sccsfds
Modified By: Portal User 2020-11-06T20:49:47+05:00

File Updated by Dan Love
Portal User(2020-11-06T18:54:59+05:00)
test
Modified By: Portal User 2020-11-06T18:54:59+05:00

Update

3

By clicking the UPDATE FILE tab on the right side of your screen you may be able to add notes and update the Lead Stages. You may also see old notes from the Loan Officer or the REC Team.

REMEMBER: We encourage you to hit the **Notify All** button!

4

Please do not change the lead Stage if the lead is already on the Sent to Lender Stage for us to be able to check those files that need an update from the Loan Officer assigned on the lead.

REAL ESTATE CONNECTION CLIENT PORTAL

Dashboard

Pipeline

- REC Direct (234)
- REC Connect (6)

Resource CENTER

- View FAQ
- Create Ticket
- Check Status

New Lead

Show 50 entries

Lead	Name	Area	Stage	Sub Stage	Created On
HL5919	Trey Senn	Smyrna, GA 30080	New Lead, Made Contact	Email Exchange	11/03/2020 19:48 PM
					11/01/2020 03:48 AM
					10/27/2020

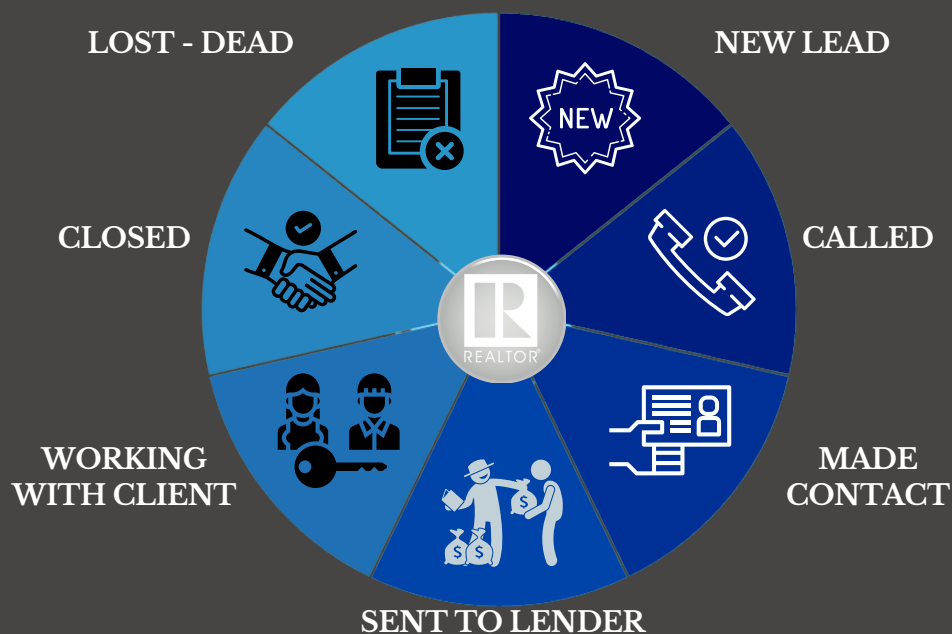
Click on Lead Name to view contact info

First Name: Trey
Last Name: Senn
Cell: 7045334122
State: GA
Address:
Email: treysenn@gmail.com

5

You may be able to check out buyer info if needed on the portal as well!

STAGES OF LEAD MANAGEMENT



REC PRO TIP: You must know the stage of your leads to be able to efficiently work a pipeline, the above stages represent major lead grouping.

HOME FINDER



\$ 4.3 M • FURNISHED

THE DREAM BUNGALOW BEVERLY HILLS, CALIFORNIA

According to Wikipedia, a newsletter is a regularly distributed publication that is generally about one main topic of interest to its subscribers. Newspapers and leaflets are types of newsletters. For example, newsletters are distributed at schools to inform parents about things that happen in that school. According to Wikipedia, a newsletter is a regularly distributed publication that is generally about one main topic of interest to its subscribers. Newspapers and leaflets are types of newsletters. For example, newsletters are distributed at schools to inform parents about things that happen in that school.

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HOME FINDER

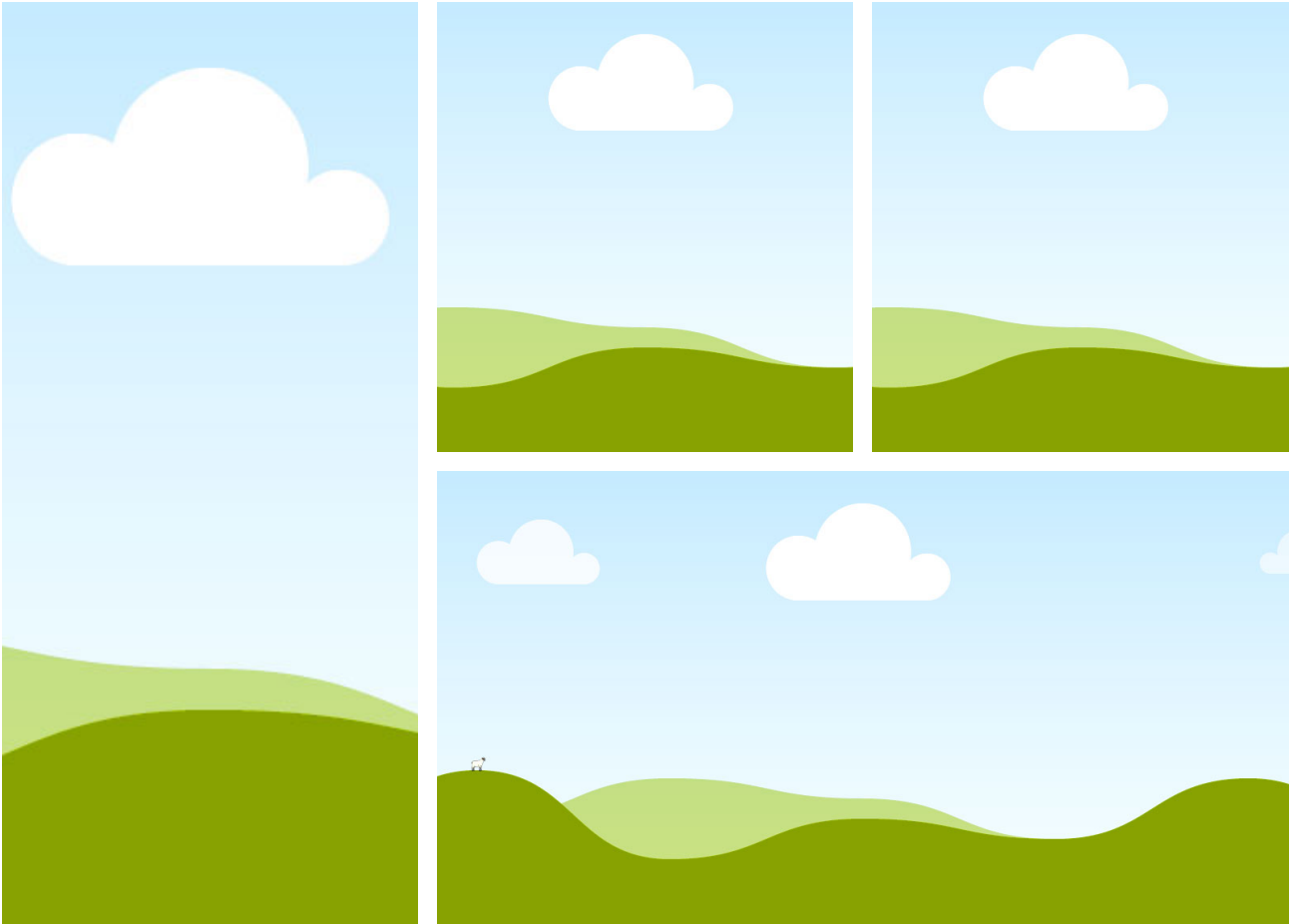


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GLAMOROUS MANSION BEVERLY HILLS, CALIFORNIA

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SENSE N' STYLE

Monthly Email Newsletter curated by our top Editors



SHOP THIS LOOK

A newsletter is a regularly distributed publication that is generally about one main topic of interest to its subscribers. Newspapers and leaflets are types of newsletters. For example, newsletters

SUMMER BLUES

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TOO TRENDY!

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