



FUB LEAD STAGES

Follow Up Boss / Agent quick reference

1 CONNECT & QUALIFY

Lead

Brand-new leads, days 1-10. Reach out every day until you make contact.

CALL Daily

Attempted Contact

Not reached in the first 10 days. No two-way communication yet; continue outreach.

CALL Every other day

Appointment Set

First appointment set with a lead. Do not use for repeat appointments.

No call cadence

Spoke with Customer

Hot leads you have spoken with; still gathering details and identifying their timeline.

CALL Daily / Maximum 1 week in this stage

Met with Customer

Leads you have met. Re-stage shortly after the meeting to the appropriate stage, such as nurture.

Maximum 2 weeks / No call cadence

2 NURTURE

Not actively touring homes with you. Set **Stage: Nurture** plus their buying or selling **Timeframe**.

TIMEFRAME	CALL CADENCE
0-3 Months	Every 7 days
3-6 Months	Every 2 weeks
6-12 Months	Every 30 days
12+ Months	Every 90 days

No Plan: Call every 90 days. Rarely use this timeframe. If the timeline is unknown, use **0-3 Months** until you can clarify it.

3 ACTIVE CLIENTS & BEYOND

Showing Homes

Actively showing homes to the lead.

Submitting Offers

Actively writing offers or have offers out.

Listing Agreement

Signed listing agreement; home is not yet on the market ("Coming Soon").

Active Listing

Listing is active on the market.

Under Contract

Buyer or seller is in escrow.

No call cadence for the five stages above.

Closed

Closed deals. Automatically moves to Past Client after 1 year.

Past Client

Closed clients after 1 year.

CALL Every 90 days

4 EXCEPTIONS & ROUTING

No call cadence unless marked DNC.

Trash / DNC

No follow-up wanted, upset, DNC, or both phone AND email are bad. Automatically moves to Trash - Pond.

Archived

Not interested in follow-up right now, but not upset you called. Automatically moves to Archive - Pond.

Bought w/ Another Agent

Recently bought with another agent. Automatically moves to a different pond.

Bad/No Phone Number

Bad phone number, good email. Moves to an email-only pond.