Referral Updates

Agents are asked to update each referral:

- Once a week on Monday for the first two weeks they own the referral
- Every other week thereafter (on Mondays)
- This cadence is based on the week that the referral was given to the agent and the system checks for updates Monday mornings to identify agents who have at least 1 referral needing to be updated that day.

Text Messages prompting for the updates

- If agents have referrals requiring updates in the current week, they will receive a text message on Monday that states the following:

  "Please update your OJO referrals marked as needing review to continue receiving leads. If no new updates, confirm each status is correct & save. https://referrals.ojo.me"

- If by Thursday, the same referrals that flagged the system for sending the text on Monday are still not updated, the same text is sent to the agents as an additional reminder to login and update.

- **Main takeaway:** when you get a text to update your referrals on Monday do so immediately as it means you have at least 1 referral (possibly more) that needs to be updated.

Example Scenarios

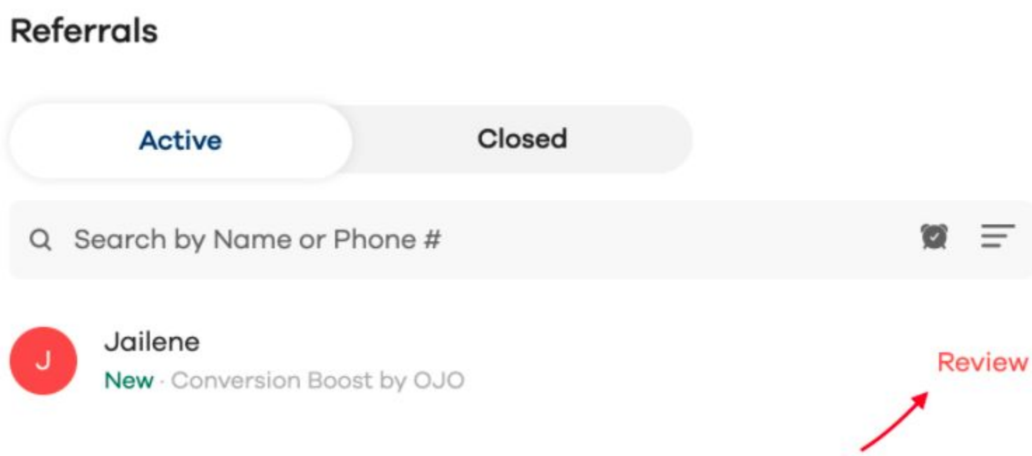
- If you get a new lead on Friday and update it right away, you will be prompted to update it again on Monday since Monday is when our system looks at the referral date.

- If you get a new lead on Tuesday, you will not be prompted to update it until Monday since Monday is when our system looks for the referral date.

- If you happen to get a new lead first thing Monday morning **before** the OJO system starts checking for referral updates (~11am) you will be prompted to update that lead the same day

Identifying which referrals are due for updates

- If you have multiple referrals in your dashboard, you will know which are in need of being updated in the current week by the “Review” tag that will displays next to them:



- When you click into the referral to provide the update, it is important you provide the update on the “**REVIEW”** page of the referral and that all 5 of the data points are accurately populated:
    - Buying Status
    - Selling Status
    - Communication
    - Are they pre-approved?
    - Timeline to buy

- If any of these are left unpopulated, you will not be able to save the record and you will see the button that says “**Enter all fields to save**”

- Just leaving a note on the “Notes” toggle page, will **not** count towards an update.

Profile | Review | Notes

Lead Quality Optional

Buying Status

Connected | Meeting Scheduled | Met | Showing Homes

Offer Made | Offer Accepted | Transaction Completed

Selling Status

Not Selling / Selling with a different agent

Listing Appointment Complete | Listing Agreement Signed

Under Contract | Closed | Unknown

Communication

Responsive | Unresponsive

Are they pre-approved?

Pre-approved | Working Towards | Unable | Unknown

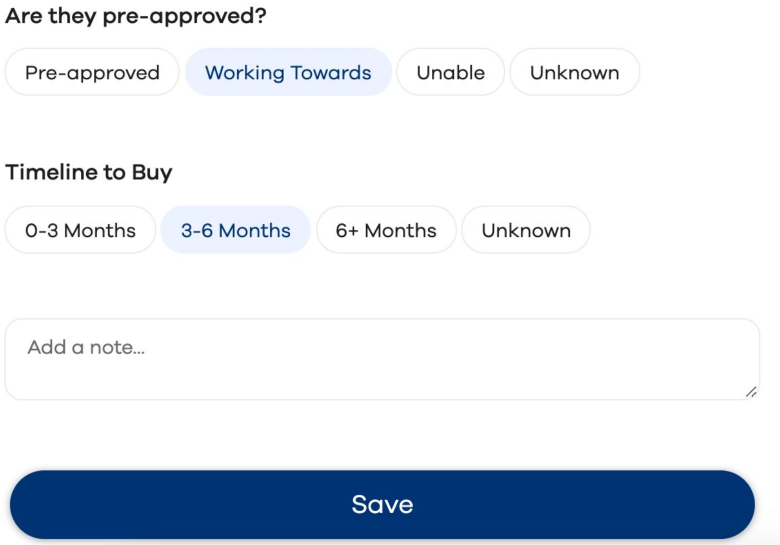
Timeline to Buy

0-3 Months | 3-6 Months | 6+ Months | Unknown

Add a note...

Enter all fields to save

- Once you have filled out and confirmed the accurate status of the fields, you will be able to click “Save” at the bottom of the record



- If there are **multiple** referrals requiring updates from you at the time, you will be able to either click “Save” (which will you bring you back to the home screen of the dashboard), or “Save & Next” which will bring up the **next** record needing to be updated.