

FiveStreet Project Requirements:

RE/MAX Lead Routing Rules - Draft

Inputs

1. All leads from RE/MAX required the following
 - 1.1. Source
 - 1.2. ListingID
 - 1.3. MLSAgentID
 - 1.4. OfficeID
 - 1.5. Zip Code/ Postal Code (First 3)
 - 1.6. Unique Lead Identifier (email/phone)
 2. A unique @fivestreet.me address will be created for every recipient of leads. A recipient is defined as a receiver of leads and can be any of the following
 - 2.1. An Office
 - 2.2. A Team Leader
 - 2.3. Individual Agent
 3. FiveStreet accounts will be created at the Office level (officename.remax@fivestreet.me)
 4. FiveStreet account creation should be standardized by using each users @remax or @integra email address. This will make the account management and support more manageable
 5. The FiveStreet profile needs to be extended to include 'OfficeID'
 6. All leads (REMAX listing agent and non REMAX leads) will route through the connector
 7. REMAX Integra will provide on a quarterly (or some agreed upon) interval a list outlining the following
 - 7.1. Full List of Zip/Postal Codes
 - 7.1.1. Office Name/OfficeID assigned to those zip/postal codes
 - 7.1.2. Agent Name/Agent ID assigned to each zip/postal codes
- NOTE: The above will be used to determine weighting and routing of non REMAX listing leads

Open Questions

1. Zip/Postal Code coverage: Is every zip or postal code assigned to at least one office?
2. It is our understanding that the Listing Agent rule will trump any 'connected agent' logic?
3. ~~Does RE/MAX support the notion of Co-Listing Agents? Do we need to worry about the notion of a primary and secondary listing agent (ie Team leader and Listing agent)~~
4. ~~Is there a time frame for consideration of a 'connected client'? (30/60/90/Longer days?)~~

High Level Requirements

1. FiveStreet Connector

- 1.1. Will maintain a list of OfficeID with associate Zip/Postal Codes and servicing agents for each Zip/Postal Code.
 - 1.1.1. The source of this information will be provided on a quarterly (or some other agreed upon interval) basis by Integra
- 1.2. Will store all submitted inquiries with the following details
 - 1.2.1. LeadEmail
 - 1.2.2. OfficeID matching the office account the lead was submitted to
 - 1.2.3. LeadPhoneNumber
 - 1.2.4. Zip/Postal Code
- 1.3. Delivery to FiveStreet
 - 1.3.1. The connector transforms the lead submission to a format supported by FiveStreet
 - 1.3.2. Lead is routed to the appropriate Office account

2. RE/MAX.com Listing Leads

- 2.1. Source = RE/MAX.com
- 2.2. Lead Data
 - 2.2.1. Name
 - 2.2.2. Email
 - 2.2.3. Phone
 - 2.2.4. Source
 - 2.2.5. Notes/Message
 - 2.2.6. Property Address
 - 2.2.7. Custom Data
 - 2.2.7.1. ListingID
 - 2.2.7.2. MLSAgentID (or some agreed upon unique ID that shared between REMAX, the Connector and FiveStreet)
 - 2.2.7.3. OfficeID
 - 2.2.7.4. Other custom fields
- 2.3. Destination: Connector
 - 2.3.1. See FiveStreet Connector for details
- 2.4. Rules
 - 2.4.1. Connector accepts the lead submission
 - 2.4.2. Connector determines the corresponding Office
- 2.5. Delivery to FiveStreet
 - 2.5.1. The connector transforms the lead submission to a format supported by FiveStreet
 - 2.5.2. Lead is routed to the appropriate Office account.

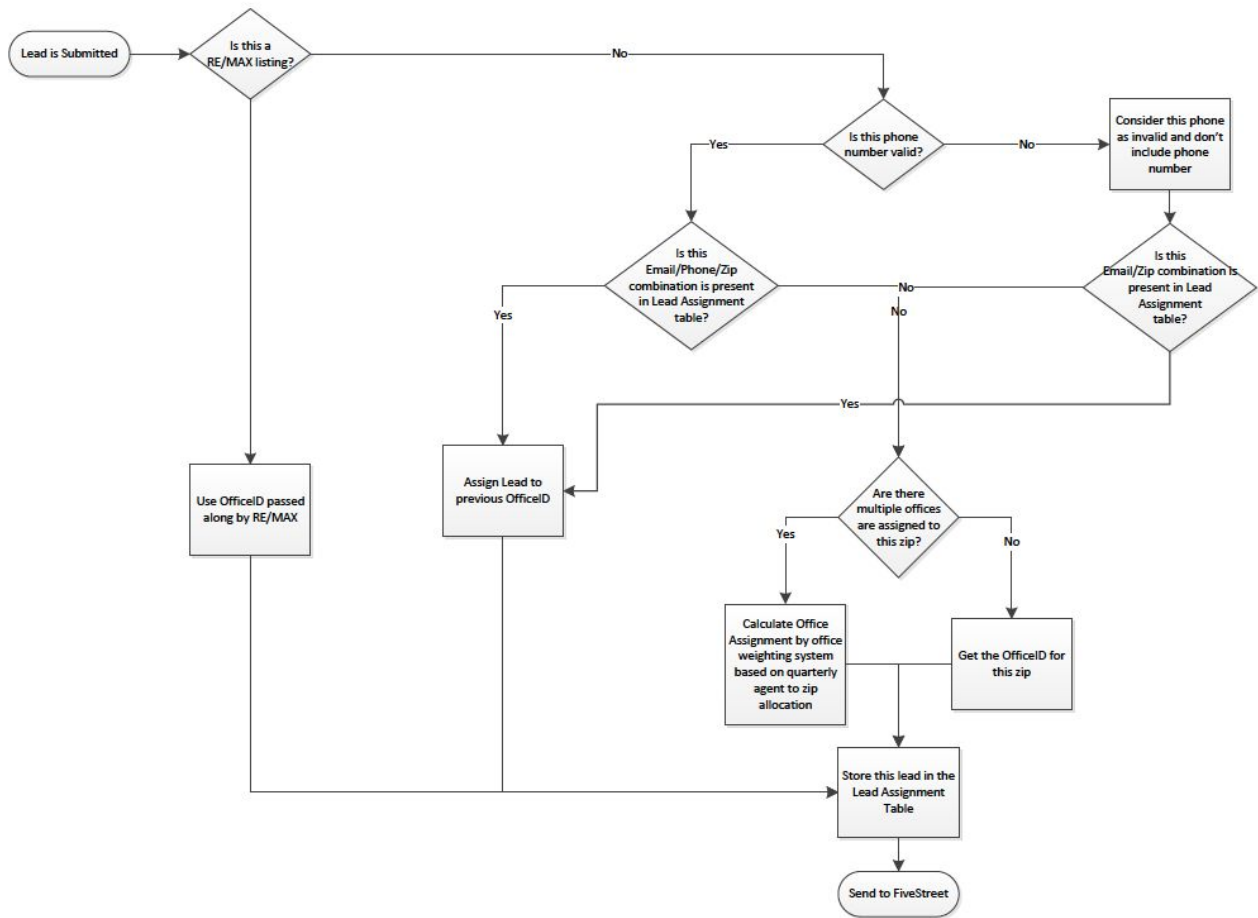
- 2.5.2.1. Once accepted by FiveStreet any Office level routing rules will be applied

NOTE: At this time the lead has been routed to the listing agent, any broadcast rules are managed inside of FiveStreet by the team leader or individual agent. Rebroadcast rules will be managed at the Office Level

3. Non RE/MAX Listing Leads

- 3.1. Source = RE/MAX.com & remax.ca & global.remax.com
- 3.2. Lead Data
 - 3.2.1. Name
 - 3.2.2. Email
 - 3.2.3. Phone
 - 3.2.4. Source
 - 3.2.5. Notes/Message
 - 3.2.6. Custom Data
 - 3.2.6.1. MLSAgentID (or some agreed upon unique ID that shared between REMAX, the Connector and FiveStreet)
 - 3.2.6.2. Property of Interest - Address
 - 3.2.6.3. Property of Interest - URL
 - 3.2.6.4. Other custom fields
- 3.3. Destination: Connector
 - 3.3.1. See FiveStreet Connector for details
- 3.4. Rules for Office assignment
 - 3.4.1. When an inquiry is submitted the **email address and zip/postal code** for the lead are compared within the connector against previously submitted leads
 - 3.4.2. If no match exists for the combination of email address and Zip/Postal Code the connector will determine the servicing office(s).
 - 3.4.2.1. If there is only one servicing office for the zip the connector will submit the lead to the corresponding Office account
 - 3.4.2.2. If there are more than one servicing offices for the zip the connector will select an Office account on a weighting system based on the number of agents per Office associated with the zip
 - 3.4.3. If a match exists the lead will be submitted to the same OfficeID that the previous lead was submitted to
- 3.5. Delivery of lead to FiveStreet
 - 3.5.1. Once an OfficeID has been determined FiveStreet will submit the lead to the corresponding Office account

FiveStreet Connector – Workflow



Other considerations:

- How to handle Spam?
- Can we “log” this activity, ie. each lead, which offices were eligible, their proportionate weighting, and the final chosen office. An activity log would be good.
- Can we get a report on individual office’s lead distribution settings or rules for support reasons? For instance, if agents tell us they are not getting leads it would be good to know what their office settings are, and then ask them to follow-up with their office if they prefer new settings.
- Broadcast / shotgun vs. Round-robin / hunt group.
- What about individuals on vacation, how will they forward or reassign their leads, particularly on their own listing rule? Pros & Cons.
- How to handle global.remax.com leads? It uses a set format, for all regions. Can fivestreet create a custom receiver (ie. transform) this for us? Need to provide global lead api specs to fivestreet.
- What property information is needed for Canada in Fivestreet?

- for distribution, just need the listing agent id to match listing agent, office agent, or postal code to distribute.
- for property information to display in fivestreet, need a feed.
- What about leads that are not a property inquiry?
 - Can we “ensure” there is a geocoding?
 - Craig: Need some sort of “geo” information to direct to the right office. Instead of a property id, each lead MUST have some “zip”. Alternatively, would need a lead incubation (ie. call center).
 - Scenario A: My RE/MAX Sign ups (ie. cold leads today)
 - Scenario B: Region or Office or Agent “contact us” on their profile
 - For the agent profile, same as a listing agent lead except the property is null. It is different than a “listing agent” rule, in that we probably DO NOT want to re-offer it, ever.
 - Other scenarios? [What about real-time/chat?]
- Does fivestreet adjust the penalties and incentives for leads?
 - ie., if they do not login with 21 days, remove from lead pool (current rule)
 - ie., if they do not claim leads after 10 offers, remove from the lead pool or reduce likelihood, or flag them as delinquent. [Craig: today, broker can manage this an optimize by sitting down with them, or checking the claim/unassigned metrics, considering some options].