Notebook LM with study guides, custom podcast, etc  
  
Flowchart Visualization: file:///Users/mukundchopra/Downloads/BPO%20Flowchart.svg  
Public Link: <https://tinyurl.com/3jjdv374>  
  
Updated  
  
​​Below is the updated Sales Playbook SOP and SLA document with a new "Trust & Accountability" section added at the top. This section sets the tone for all interactions, emphasizing that trust is built by doing what we say—consistently and punctually—ensuring that every commitment we make is followed through.

# **Sales Playbook SOP and Service Level Agreement (SLA)**

## **Trust & Accountability**

Trust is the foundation of our business. It is built by consistently doing what we say we will do—no matter how small or large the commitment. Our guiding principle is: **"Say it. Do it."**

* **Follow Through on Commitments:**
  + If we promise to call a customer at 8:00 AM, we call at 8:00 AM.
  + If we say we will respond within 10 minutes, we do so (or even sooner).
* **Proactive Communication:**
  + In cases of delays or capacity constraints, it is our responsibility—not the renter’s—to inform the customer with a clear, logical explanation.
  + We communicate any changes immediately and outline the next steps before ending every interaction.
* **Structured Interactions:**
  + Every major interaction must conclude with a clear action plan. For example, “I will send you the list of available units in 10 minutes, and I expect your feedback within 5 minutes.”
  + This structure ensures that both the customer and our team remain accountable.
* **Accountability Breeds Accountability:**
  + Our internal accountability—ensuring our team follows through—sets the standard for customer accountability.
  + Failure to meet our own commitments is considered an SLA breach and will incur penalties.

By being relentlessly accountable and structured in our processes, we build trust with our customers, encouraging them to reciprocate with prompt and professional behavior.

## **General Governing Principles & Idioms**

Our approach is built on Socratic selling and logical progression. We never make assertions; instead, we extract statements in successive logical building blocks that lead to the sale. We proactively anticipate breakdowns and work to mitigate them. Key idioms that guide our mindset include:

* **Time is the enemy:** Move swiftly—every minute counts.
* **Only the paranoid survive:** Remain vigilant and proactive with follow-ups and anticipating issues.
* **The end is at the beginning:** Establish the closing goal at the outset of every conversation.
* **The reasoning sale:** Use logical, fact-based arguments to guide the client.
* **Externalize the pressure:** Attribute urgency to external market forces rather than to yourself.
* **Speak in terms of the other person's interest:** Frame every conversation around the client’s benefit.
* **Extract statements; don’t make them:** Encourage the lead to articulate their needs and motivations rather than imposing assertions.
* **Do not increase the burden of proof:** Avoid setting unrealistic expectations (e.g., promising to "find your dream home") without first verifying that qualifying, matching inventory exists. Ensure all claims are substantiated by current market data and aligned with available inventory.

## **Step 1: Lead Qualification and Initial Engagement**

### **Objective:**

Screen inbound leads, cultivate intent, and create a high-velocity action plan. Engage every positively responsive lead within **2-5 minutes** to maximize conversion potential. **Getting on the phone is the priority.**

### **Process Overview:**

1. **Immediate Response:**
   * **Action:** Contact the lead within 2-5 minutes of response.
   * **Context:** Even if AI agents via SMS have already gathered initial requirements and sent inventory details, **we always push to get on the phone.**
   * **Alternate Plan:** If the client cannot talk (e.g., due to work), schedule a callback for the next available time.
   * **Goal:** Quickly screen for intent and drive toward a live conversation.
2. **On the Phone: Three-Part Call Structure:** **A. Understanding Motivation & Pain (Pull Sale Technique & Socratic Selling):**
   * **Tone:** Neutral, landlord-like, non-salesy.
   * **Approach:**
     + Use **Socratic selling** by asking probing, logical questions (e.g., “Why not just stay where you are?” or “Why don’t you just extend the lease?”) to extract the lead’s statements.
     + **Goal:** Have the lead articulate their urgency and pain points, validating their need to move.
     + **Reminder:** Extract statements; don’t make them.
3. **B. Qualification – Direct vs. Indirect Approval Path:**
   * **Direct Approval (600+ credit & 3x income):**
     + Confirm qualifications and proceed with available options.
   * **Indirect Approval (Majority):**
     + Express concerns (e.g., “This could complicate things. Can you pay a higher deposit?” or “Do you have a co-signer?”) to build urgency.
     + **Goal:** Identify obstacles and craft a high-velocity action plan using logical, fact-based reasoning.
4. **C. Creating a Plan of Action:**
   * **Agent Task:** “I will check with properties to see if they’ll take you.”
   * **Lead Task:** “Send me your income and credit score via email while we’re on the call.”
   * **Multi-Channel Engagement:** Ensure you **exchange emails or secure a calendar invite acceptance** before ending the call.
   * **Goal:** Build urgency, secure mental investment, and cement the next step in writing.
5. **Post-Call Actions:**
   * **Documentation:** Log a detailed Follow-Up Boss note capturing the call summary, qualification path, and agreed action plan.
   * **Client Follow-Up:** Send a recap text/email with the action plan and secure confirmation (via thumbs up or calendar invite acceptance).
6. **Anticipate and Mitigate Breakdowns:**
   * Confirm that the client will attend scheduled calls.
   * Verify that all parties will meet at any scheduled showing.
   * Follow up after showings to confirm outcomes.
   * Maintain externalized pressure on signing by securing buy-in to the plan before it begins and reconfirming that buy-in in writing.

### **SLA Requirements (Step 1):**

* **Response Time:** Lead contacted within **2-5 minutes** (95% adherence).
* **Engagement Rate:** At least **80% of leads** engaged on the first call.
* **Task Completion:** **70% of leads** complete assigned tasks promptly.
* **Multi-Channel Commitment:** Every call must conclude with an email exchange or calendar invite acceptance.

## **Step 2: Tailoring Tone & Approach Based on Lead Qualification**

### **Objective:**

Adapt your communication tone to objectively educate renters using fact-based reasoning. Drive leads quickly through the funnel while aligning them with market realities.

### **Approach:**

1. **Direct Approval (High Income, High Credit):**
   * **Tone:** Concierge, consultative, non-pushy.
   * **Approach:**
     + Present multiple options with a focus on premium service and convenience.
   * **Handling Unrealistic Expectations:**
     + For leads with unrealistic expectations or leaning toward lower commission-paying options, begin with exploratory questions:
       - “I understand you're looking for a $1k 1-bed in River North. Out of curiosity, have you lived in Chicago before? When is the last time you rented? When did you last scan the market? Have you had success finding units at that price point? How long have you been looking?”
     + Follow with fact-based statements:
       - “Based on what I'm seeing, the average 1-bed in that area is $2400.”
       - Constructively add: “But I am keen to find something for you! Have we considered studios? Perhaps we can do without a washer/dryer in a slightly older building? The South Loop is nearby, and I have something at $1700.”
     + **Key Point:** Aggressively address requirements—explore if the budget can be increased or if the unit type can be adjusted (from 3-bed to 2-bed, 2-bed to 1-bed, or 1-bed to studio) objectively after priming with exploratory questions.
2. **Indirect Approval (Low Income, Low Credit):**
   * **Tone:** High-pressure, urgency-driven, and fact-based.
   * **Approach:**
     + Emphasize scarcity and limited market options.
     + **Externalize the pressure:** “These are market constraints, not our limitations.”
     + **Goal:** Prompt rapid decision-making using logical, market-based arguments.
3. **Anticipate and Mitigate Breakdowns:**
   * Always verify client commitment before making fact-based statements.
   * Secure written buy-in to the proposed plan before progressing.

### **SLA Requirements (Step 2):**

* **Tone Adaptation:** 95% compliance in adjusting tone based on the lead’s profile.
* **Negotiation Conversion:** Achieve a 70% conversion rate for low-income, low-credit leads using fact-based negotiation.
* **Addressing Unrealistic Expectations:** Use exploratory questions followed by fact-based recommendations for direct approval leads with unrealistic demands.

## **Step 3: Inventory Prioritization, Showing Procedures, & Conversion Strategy**

### **Objective:**

Maximize revenue by strategically prioritizing inventory that offers the highest commissions, minimal resistance, and the fastest cycle. This step governs detailed coordination of property showings and closing procedures.

### **Inventory Prioritization Hierarchy:**

1. **Highest Priority:**
   * Inventory that pays the most (100%, 150%+, etc.) and can be closed quickly with minimal effort (e.g., guest card applications in Texas and select Chicago properties).
2. **Second Priority:**
   * Inventory where the Home Easy onshore agent holds the keys—allowing for short or no-notice scheduling.
     + **Process:**
       - Schedule a showing, verify capacity, and book the unit.
       - **Ensure that the onshore agent has the necessary availability and staffing** to handle the appointment.
       - Handoff between the onshore agent and the client is conducted via a two-way text thread and a templated itinerary email outlining the selection rationale and closing strategy.
3. **Lowest Priority:**
   * Inventory requiring advance scheduled showings (2–4 days notice) with onshore Home Easy representation and coordination with a counterparty agent.
     + **Context:**
       - Applies to very high-end luxury apartments (Chicago, downtown Dallas/Austin, etc.).
       - **Note:** These appointments are sensitive due to leasing agents’ selectivity and potential turf issues.
4. **When Matching Inventory Is Not Found:**
   * **Independent Web Research:**
     + Use Google, Apartments.com, and Zillow to identify additional inventory that meets the client’s criteria.
   * **Database Expansion:**
     + Add the newly found inventory to internal databases.
     + Prioritize properties from management/ownership groups that pay commissions, especially in competitive markets. Cross-reference these groups using internal spreadsheets.
   * **Outbound Calls to Management/Ownership Groups:**
     + If no matching inventory exists, call these groups.
     + **Negotiation Tactics:**
       - If they resist paying fees, cite the number of empty units on their website and mention that competitors in other locations are paying similar fees.
       - Request escalation to management/ownership and inform them of the number of renters we have for them.

### **Showing Procedures & Coordination:**

* **Google Meet for Fast-Track Closings:**
  + Use Google Meet whenever possible for rapid closings, ensuring proper sale attribution.
* **No Appointment Required / Self-Show (Primarily in Texas):**
  + Send guest card info.
  + Remain on a Bluetooth call to “pillow talk” the client all the way to the building.
  + Coordinate with the building’s leasing agent to confirm the client’s arrival.
* **Onshore Agent with Keys:**
  + Schedule quickly with minimal notice.
  + **Verify the onshore agent’s availability and staffing** before scheduling.
  + Ensure a smooth handoff between the onshore agent and the client.
  + Use a templated itinerary email and maintain a two-way text thread for coordination and follow-up.
* **Agent Accompaniment with Counterparty Agent (High-End/Luxury):**
  + Requires 2-4 days advance notice for scheduling and documentation.
  + Coordinate with both Home Easy onshore and the counterparty agent.
  + Be sensitive to leasing agents’ preferences and any prior turf issues.

### **Closing Procedures on Google Meet:**

* **Always Initiate by Phone:**
  + Call the client and remain on the phone until they join the Google Meet call.
  + **Do not disconnect** until payment is processed and all required proofs are obtained.
* **Proof of Payment & Building Verification:**
  + Ensure that payment is completed and documented before ending the call.
  + Collect proof from the building (e.g., photo, digital confirmation, or leasing agent verification).
* **Agent Presentation:**
  + Agents must be in a well-lit area with their camera on during the Google Meet call.
  + Begin with a warm greeting—sign and wave, smile, and make eye contact—to reassure the client that they are speaking with a real human, addressing concerns about AI systems.
* **Anticipate and Mitigate Breakdowns:**
  + Confirm full client commitment before progressing.
  + Secure written buy-in (via chat or email) before initiating payment.

### **SLA Requirements (Step 3):**

* **Inventory Prioritization:** 100% adherence to the established hierarchy.
* **Follow-Up Cadence:** Make **4-5 attempts** (via phone, text, and email) before closing a ticket.
* **Showing & Closing Execution:**
  + Every self-show, onshore key handoff, coordinated appointment, and Google Meet closing must follow the detailed procedures.
  + Continuous client contact (e.g., Bluetooth calls during self-show) and robust coordination with all parties are mandatory.
  + Strictly follow Google Meet closing guidelines until payment and all required proofs are secured.

## **Step 4: Reporting and Daily Operating Cadence**

### **Objective:**

Ensure daily accountability, monitor adherence to action plans, and adjust lead prioritization in real time.

### **Daily Cadence:**

1. **11:00 AM Meeting:**
   * **Focus:**
     + Report outcomes of all qualifying calls.
     + Review and analyze call summaries.
     + Prioritize leads and assign custom action plans based on current data.
   * **Goal:** Align the team’s focus for the day, ensuring that leads are grouped by urgency with tailored action plans.
2. **4:00 PM Meeting:**
   * **Focus:**
     + Recap the day’s progress.
     + Evaluate leads against the action plans set at 11:00 AM.
     + Confirm adherence to established action plans and adjust strategies for any deviations.
   * **Goal:** Ensure continuous improvement and accountability while refining the strategy for the next day.

### **SLA Requirements (Step 4):**

* **Daily Reporting:** Mandatory 11:00 AM and 4:00 PM meetings with documented reports and action plan updates.
* **Team Accountability:** Each meeting must produce a report on lead outcomes and adjustments to the prioritization strategy.

## **Step 5: Post-Application Follow-Up & Move-In Coordination**

### **Objective:**

Ensure that after the application is submitted, every necessary step is completed until the client fully moves in and collects the keys. This phase is governed by our idiom, **"Only the paranoid survive,"** requiring relentless follow-up.

### **Process Overview:**

1. **Application Confirmation:**
   * Congratulate the client on submitting the application.
   * Emphasize that while the application is in, further steps remain.
2. **Payment Verification & Unit Confirmation:**
   * Confirm that the client has paid by obtaining a payment receipt or other proof of payment.
   * Verify via the building’s system (or through direct contact) that the unit is marked as taken.
3. **Building Communication:**
   * Recognize that many buildings—especially lower-income ones—may be slow or non-responsive.
   * Continuously follow up with the building; if necessary, contact sister buildings under the same management or ownership.
   * Provide constant updates to the client, assuring them that you are actively progressing the process.
4. **Deficiency Mitigation & Supporting Evidence:**
   * If the client has deficiencies (e.g., low income/credit), proactively send templated emails to the building explaining the client’s willingness to pay a higher deposit or utilize a cosigner.
   * Use standard templates to communicate the client’s strengths and any mitigation measures.
5. **Lease Generation & Additional Documentation:**
   * Follow up to ensure the building sends the lease.
   * If additional documentation is requested (e.g., pay stubs, move-in forms, pet details, parking information), coordinate with the client to provide these promptly.
   * Understand that if these documents are not provided, a lease may never be generated.
6. **Final Move-In Coordination:**
   * Even after a lease is generated, confirm that the client receives keys.
   * Address any issues immediately (e.g., changes in unit number, delays in key issuance).
   * Continue coordinating between the client and building until the move-in is complete.
   * Note: The final payment event is triggered only once the client has fully moved in and collected the keys.

### **SLA Requirements (Step 5):**

* **Proactive Follow-Up:** Maintain daily communication with both the client and the building until move-in is confirmed.
* **Documentation:** Record all interactions and confirmations (payment proof, lease receipt, key collection) in Follow-Up Boss.
* **Escalation:** If necessary, escalate issues to sister buildings or management/ownership groups using documented evidence.
* **Approval Rate Goal:** With proactive follow-up, aim for an 80%-90% approval rate even in complex cases.

## **Core Operating Principle: High-Velocity, Fact-Based Conversion**

1. **Aggressive Action:**
   * You do not wait for responses; you screen, cultivate, and push leads swiftly through the funnel.
2. **Socratic Selling & Fact-Based Reasoning:**
   * Use logical, objective, data-driven arguments to educate the renter and create urgency.
   * **Extract statements rather than make them.** Let the client articulate their needs.
   * **Externalize pressure:** Attribute urgency to market conditions, not personal pressure.
   * **Do not increase the burden of proof:** Avoid misguiding statements or setting unrealistic expectations without verifying that qualifying inventory exists.
3. **Minimize Cycle Time:**
   * Every step is designed to be fast, cost-effective, and high in expected value.
   * Aggressively address client requirements by exploring if their budget can be increased or if the unit type can be adjusted (from 3-bed to 2-bed, 2-bed to 1-bed, or 1-bed to studio) in an objective, fact-based manner after priming with exploratory questions.

## **Compliance and Reporting**

* **SLA Adherence:**
  + Strict compliance is required from all call center partners and internal teams.
  + Non-compliance will trigger performance reviews and potential contract termination.
* **Documentation and Audits:**
  + All calls and actions must be logged in Follow-Up Boss and centralized spreadsheets.
  + Daily reviews at 11:00 AM and 4:00 PM ensure accountability and process optimization.
  + Quarterly audits will be conducted to maintain best practices and refine the process as needed.

## **Final Notes:**

This document is immediately enforceable and is intended to continuously evolve with best practices. By following this high-velocity, fact-based approach—and leveraging Socratic selling along with our core governing principles—we maximize conversion rates while ensuring a customer-centric, market-driven process that achieves the highest value outcomes in the shortest possible cycle.

Feel free to print and display this document in your workspace as a reference and guide for all team members and call center partners worldwide.