BRIVITY
PLATFORM

Brivity Database Standards

These standards are best practices to ensure that your database is being worked in the most efficient manner possible. By holding yourself and your teams accountable to these standards, you are more likely to capitalize on the most number of opportunities inside the database.

NEW

New Leads
New leads should be processed as soon as possible but definitely in the first 24 hours. Processing a new lead involves making the first phone call and then changing the status of the lead so it's no longer in a 'new' status.

Reminders and Tasks
Priority 1 reminders: when a promise is made for a specific day to a contact in the database. "You're going to speak with your lender on Thursday? That's awesome! I'll call you next Friday".

Priority 2 reminders: when a promise is made for a timeframe to a contact in the database. "I'll follow up with you next month"

Priority 3 reminders: Everything else where there is no promise to the contact.

Every Hot, Watch, Nurture and Past Client contact in the database should have a **next due task** established.

Recent Website Visitors
Recent website visitors should have a last interaction within the last 7 days or a next due task in the future. Unqualified recent website visitors should be called/texted daily.

Recent Market Report Viewers
Recent Market Report viewers should have a last interaction within the previous 7 days or a next due task in the future. Unqualified recent market report viewers should be called/texted daily.

HOT

Hot Status Contacts (0-90 days out)
Contacts with a hot status should be contacted once per week at a minimum.

NURTURE

Nurture Status Contacts (3-12 months out)
Contacts with a nurture status should be contacted once per month at a minimum.

WATCH

Watch Status Contacts (1 year or more out)
Contacts with a watch status should be contacted once per quarter at a minimum.

PAST CLIENT

Past Client Status Contacts
Past clients should have a 'last interaction' logged within the last 30 days, or a future task/reminder of the next intentional interaction we plan to have with our past clients.

Listing Alerts
Every buyer prospect in the database should be set up to receive listing alerts. Every. Single. One. If we have an idea of a property or properties that the contact has looked at or inquired about in the past, we use that property as the baseline for our listing alert. If we are unsure of what properties to send them, we use a generic listing alert for your market (often the largest city or cities in a price range around the average priced home in that market, ie, Seattle, $600,000 - $900,000). At least 50% of the database should have an active listing alert.

Market Reports
Every contact in the database with an email address and a home address should be set up on a market report. This will include your past clients, sphere of influence and seller prospects in the database.

Every buyer lead should also have a market report that shows them the market for the area in which they are interested. Often this market report will mirror or match the listing alert we are sending them.

Dashboard

The dashboard should be reviewed daily as high value activities occurring on the website are displayed on the dashboard. Home valuation requests, requested showings and questions being asked by website visitors about specific properties from the website will show up in the dashboard.

Message Center

The message center should be reviewed daily. Make sure every single text message from a prospect in the database has received a reply. Replies should take the form of 'statement, question'.