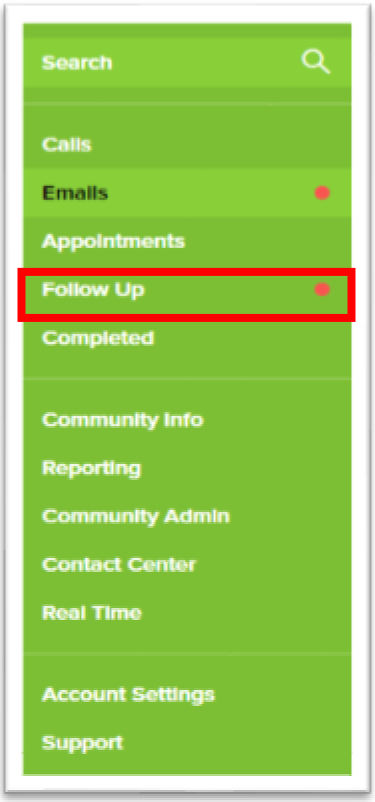
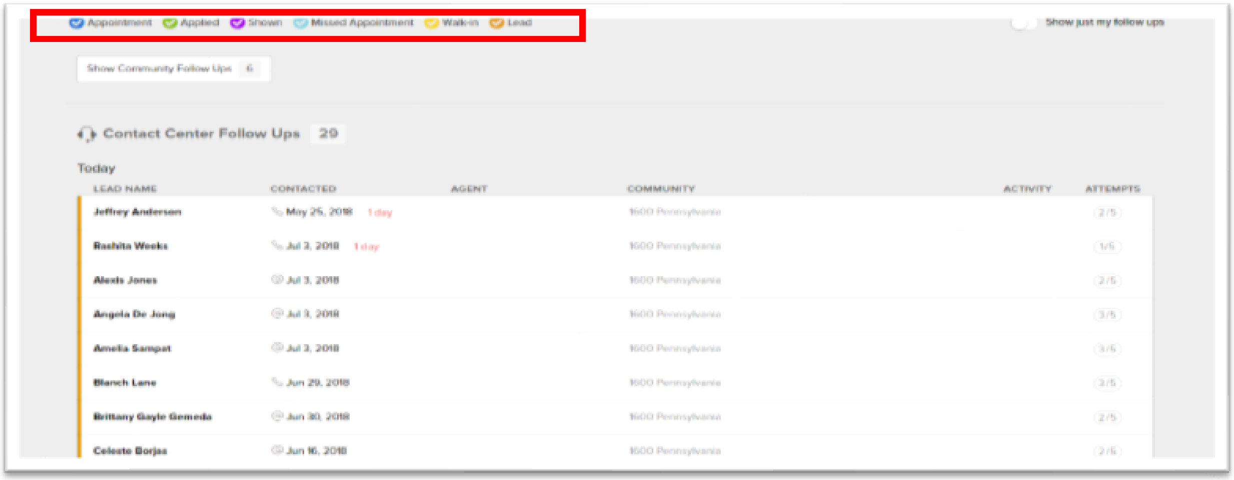
How to Complete and Process Follow Ups

You can access the Follow Up page by clicking on Follow Up located on the left side of the screen.



Once you click on the Follow Up tab you will be redirected to the Follow Up home page. Notice at the top of the page there are multiple colored indicators which represent the following:

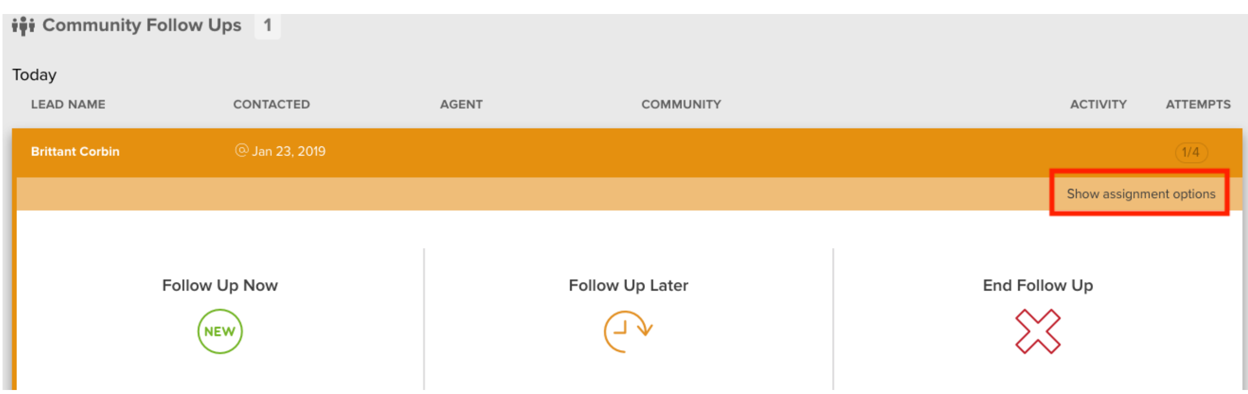
- Appointment (Blue)
- Applied (Green)
- Shown (Purple)
- Missed Appointment (Light Blue)
- Walk-in (Yellow)
- Lead (Orange)



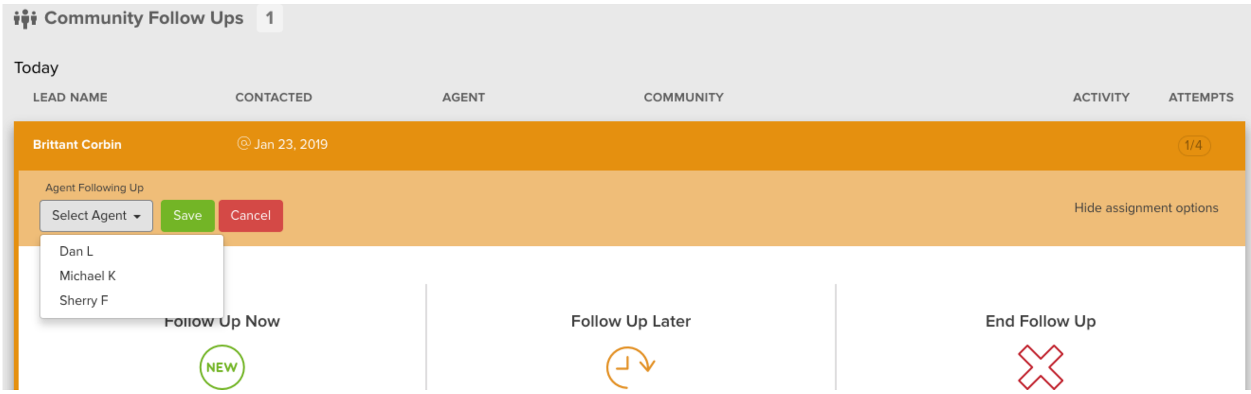
Each Prospect's name is represented by color indicators, located on the left side of each prospect's name. The most recent type of contact (phone call or email) is located on the left side of the date under "Contacted". You can also see the number of attempts that have been made with the lead in your attempts to convert them to a resident.

In the example above, the first lead name (Jeffrey Anderson) listed is currently still a lead and has not been shown an apartment. We can see when the prospect was last contacted, and the type of contact that was made, which was a phone call. We can also see that there have been 2 follow attempts made out of 5.

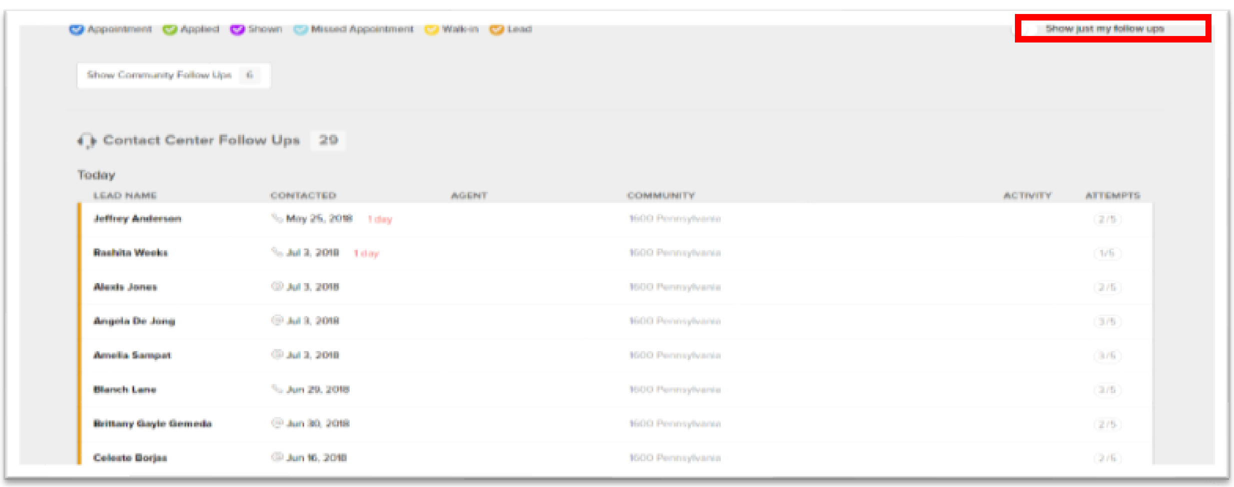
You have the ability to assign follow-ups to yourself or another agent by clicking on each follow up individually. Click on Show assignment options listed under the number of follow up attempts.



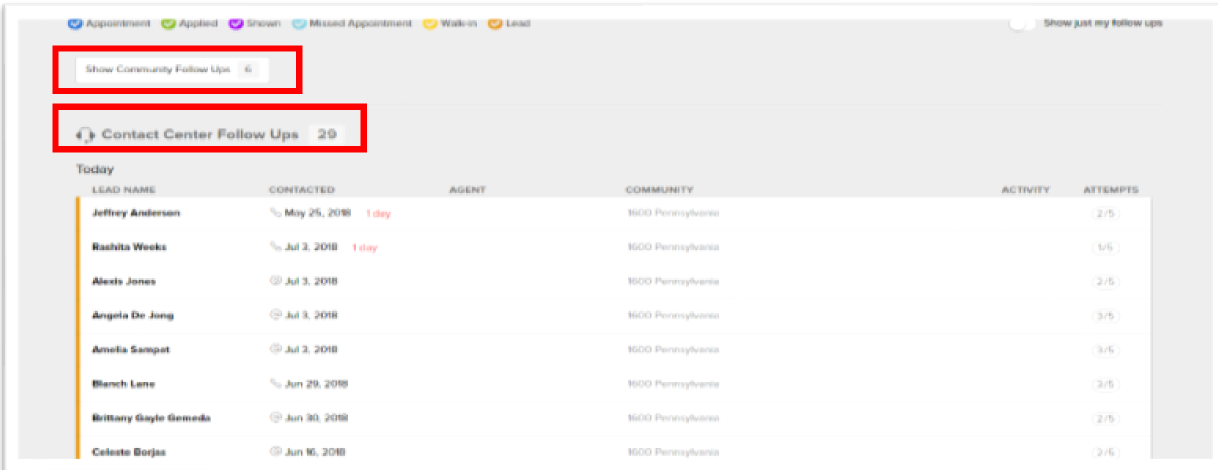
Once you select Show assignment options, you will see a drop down on the left that will list all of the agents in your community. You can then select who you would like to assign the follow up to.



In the top right of the page you will see a Show just my follow ups toggle button. This is a great way to pare down the page to show only your assigned follow ups.

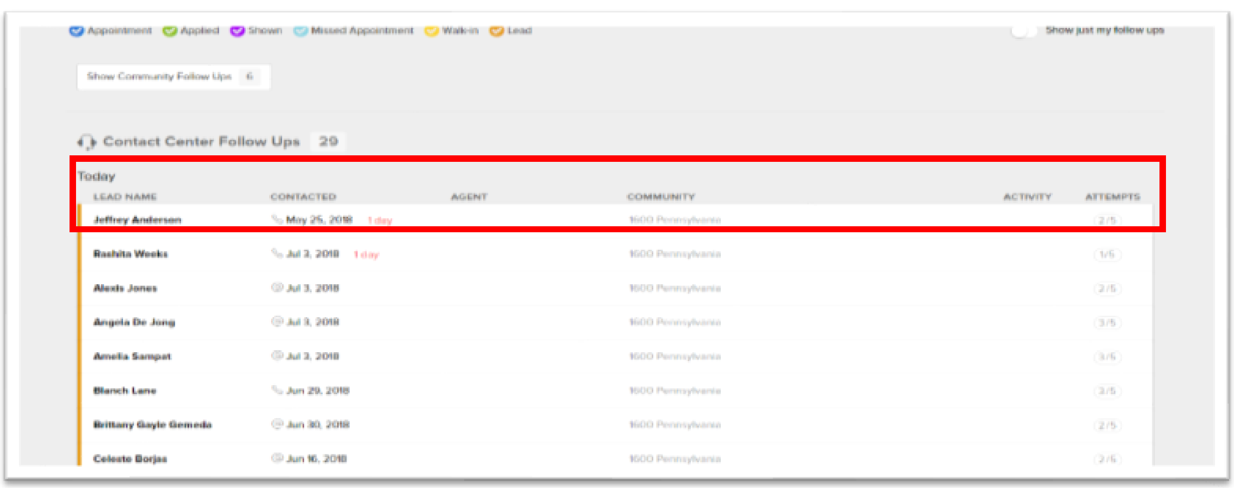


If you utilize the Contact center for Follow ups you will have the option to view both your Community and the Hello Contact Center Follow up queue.

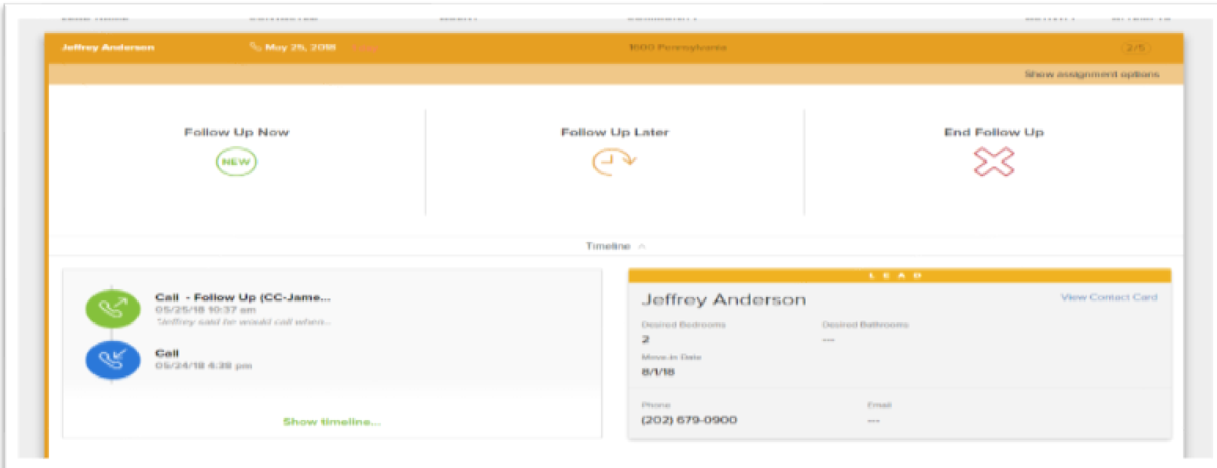


Handling a Follow Up

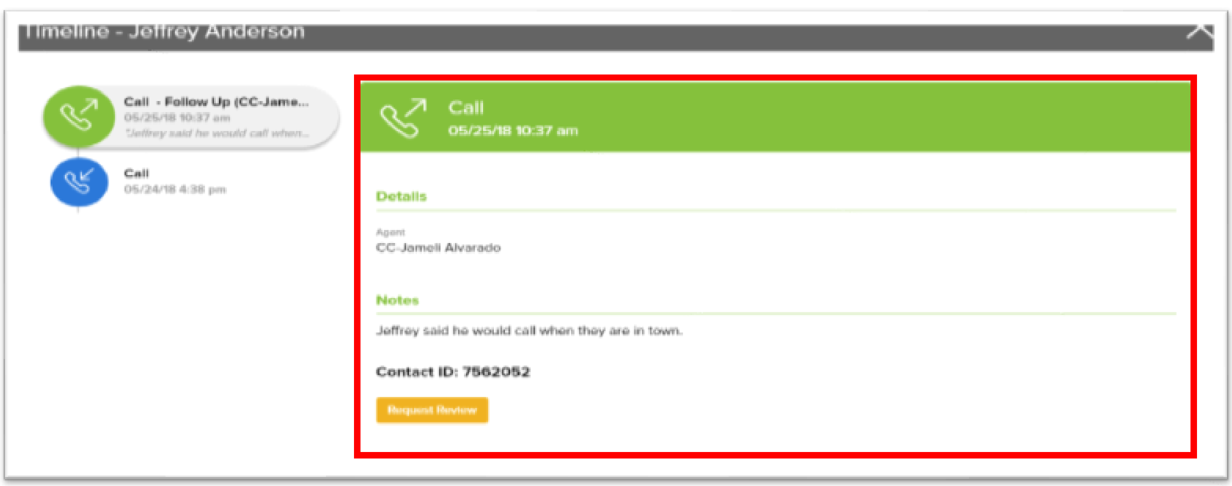
Follow ups are a crucial point for your community to keep in touch with each prospect. With Rent Dynamics, you will be able to track each lead through the follow up page and reach out to them according to the timelines you create (see Follow Up>>Settings for your community's assigned schedule).



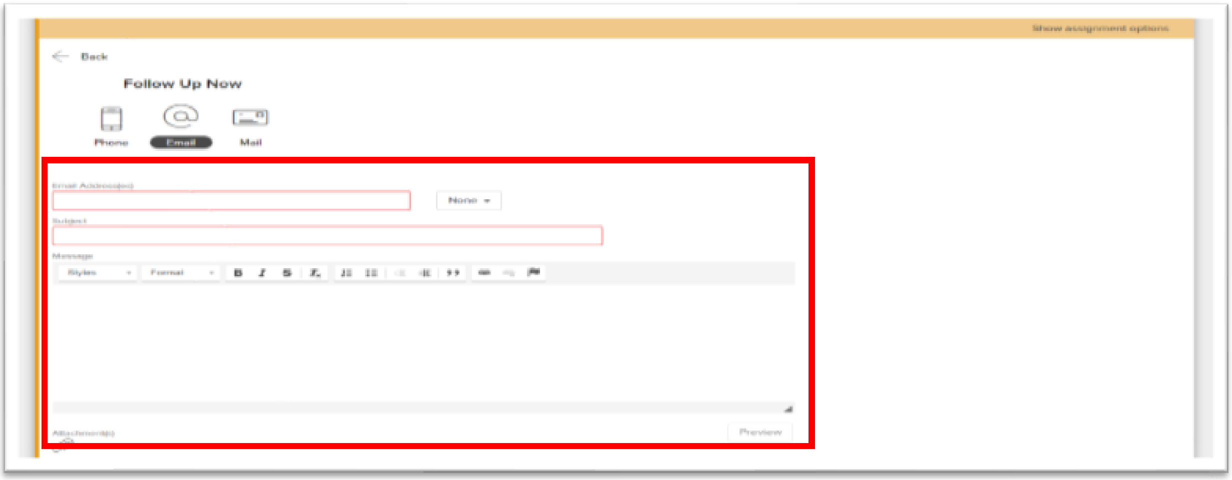
Once you select a prospect's name, the Follow Up will open and you will be able to see more details including easy viewing access to the timeline and the contact card.



Best Practice: You can look at the prospect's timeline before determining what your follow up will be to see how the prospect best responds. You will also be able to see any notes left from the previous contact, providing you with information to best personalize the interaction. Once you click on the Show Timeline you will then be directed to the most recent time the prospect was spoken to or emailed.



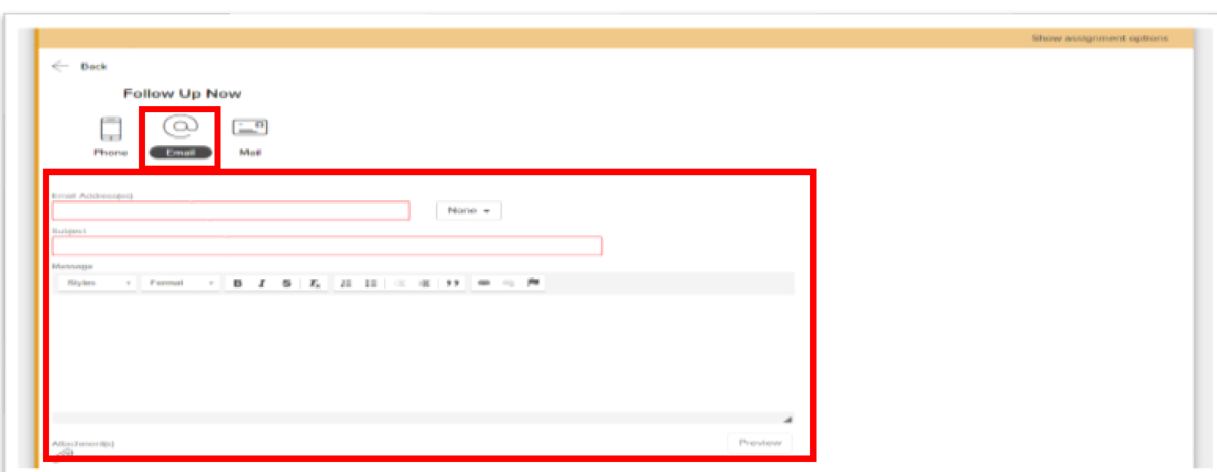
Back on the Follow Up page, you have several different options to follow up with the lead: Follow Up Now, Follow up Later, or End Follow up. When you select the Follow Up Now option, you will be redirected to a new page.

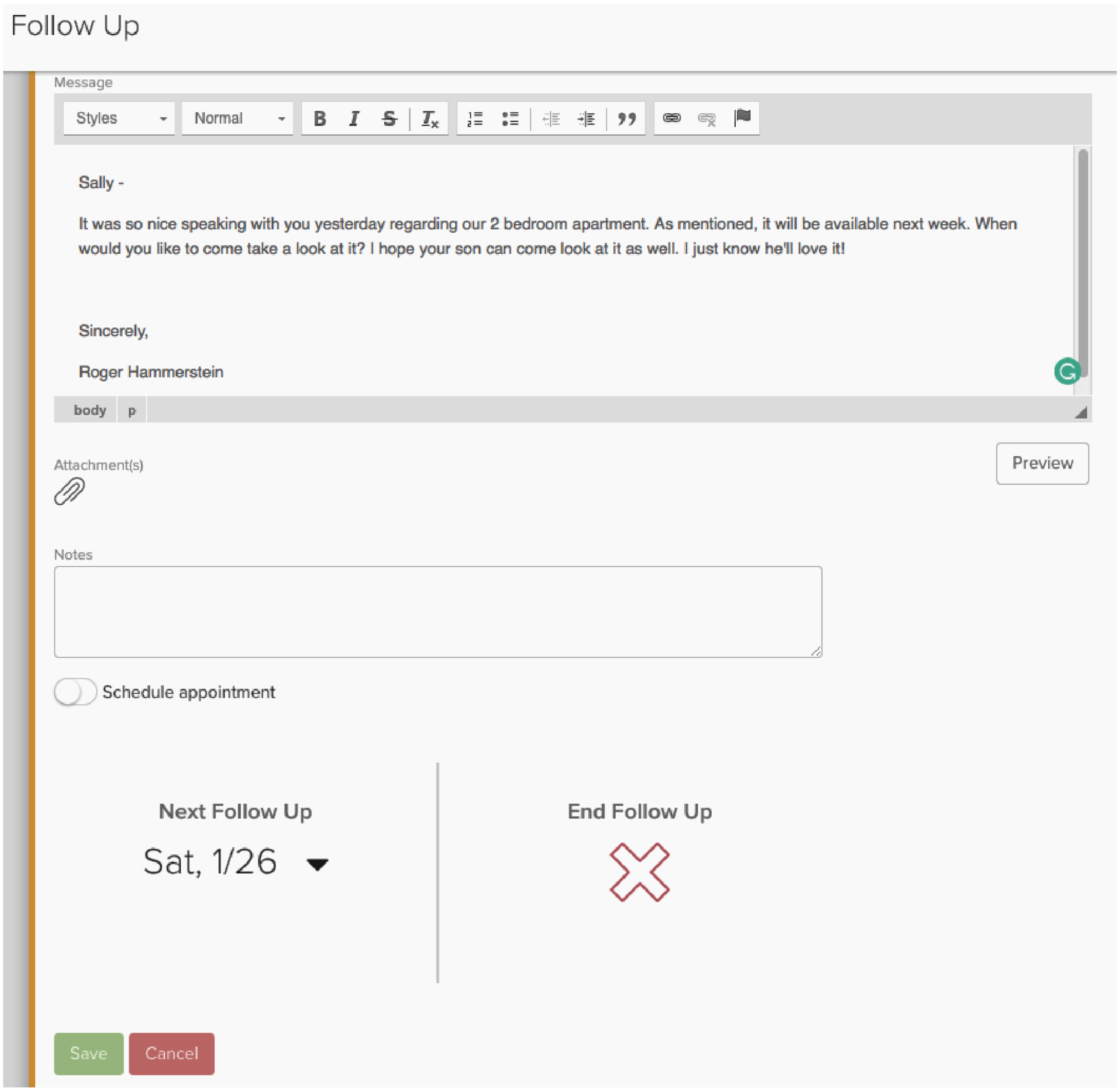


There are 3 options for Follow ups on this page: Phone call, Email, and Mail.

Email

You have the ability to email the prospect from the Follow Up screen within Rent Dynamics. If there is an email address associated with the contact card, it will autofill. However, you can manually enter in an email address if needed. You will need to also include a subject line.
If you have created follow up email templates, you can access those by clicking on the None drop down box next to the email address field.
Once you have written your message in the paragraph box, you can attach a file if needed. You will see that the next follow up will auto schedule for the next day, however, you can change it as needed to meet your community's needs. Once you select the green Save, your message will send and the Follow Up will move to the appropriate date spot in the queue.





Phone

In addition to sending an email, you will also have the option to call the prospect. If you have subscribed to the "Click to Call" feature, you can click on the blue button and it will make an outbound call to the prospect via the phone number listed in the Lead Card. It makes calling the prospect quick and easy. Otherwise, pick up your phone and dial them manually.

Best Practice: If the caller does not answer, include in the notes, details regarding the voicemail and schedule the next follow up. You will also have the ability to End Follow Up if the prospect is no longer interested.

Mail

The last follow up method is Mail. This is a great tool to keep track of contact with the prospect when you have had to physically mail information to them. Notes are the key to making this workflow successful. For example, “Mailed community brochure and application.”

Active & Ended

On the top right of the page, you will see Active & Ended. All of your current follow ups will appear under the Active tab. If you accidentally end a follow up, you have the ability to select Ended, and select the follow up you would like to reactive.