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BUILT FOR

Sierra Interactive

— LEAD CONNECT · SIERRA INTERACTIVE

The agent's playbook for a working CRM.

The statuses, alerts, filters, and tags — how the system works, and how you work it.

Edition	Platform	Service	Prepared by
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What's inside.

Five sections, nineteen pages, one system for keeping every lead moving.

Section I · The status system

Who owns the lead?

Every contact in your CRM sits in one of three status types, and the type answers one question — who's driving follow-up: you, automation, or nobody at all. Get that right and there's never ambiguity about who owes the next move.

Three types of status.

Who drives follow-up decides the type. Types decide the automation.

AGENT-MANAGED

Agent statuses

You own the outreach — calls, texts, emails, tasks, decisions about next steps. Used for relationships that need a human touch.

- Active
- Prime

SYSTEM-MANAGED

Engagement statuses

Leads here are enrolled in action plans — automated texts and emails — and show up in smart filters with a priority-based follow-up workflow.

- New
- Qualify
- Watch

ORGANIZATIONAL

Transactional & system

No automation triggered. Used to organize the database and measure pipeline outcomes — archived sphere, past clients, closed deals.

- Archived
- Junk
- DNC
- Closed
- Pending

Agent statuses.

You drive every conversation. Automation stays out of the way.

Active

In conversation, agent-led.

A two-way conversation is happening and you've taken the wheel. Automation pauses so cadence, tone, and timing are entirely yours to set.

Prime

Hot — acting within ~90 days.

Under agreement or expected to act within 90 days. Highest priority, reviewed every seven days, owned end-to-end by the agent.

Engagement statuses.

Action plans run — automations manage. Priority alerts surface the active ones.

New

Newly registered — no contact yet.

Newly registered or manually added to the system. The automated New plan starts outreach immediately; you'll see them in the PLA New filter for the first 7 days.

Qualify

Unresponsive — never replied.

Leads moved from New status after 30 days without making contact. Automation keeps nurturing while you watch for engagement signals through the Qualify-Engage filter.

Watch

Contact made — future timeframe.

Contact has been made and the lead is interested, but their timeframe is in the future. Long-term nurture runs based on their tagged timeframe (3-6, 6-12, 12+, or No Timeframe) until they re-engage.

Transactional & system statuses.

Organizational, not operational. No automation triggered.

Archived

Past clients, sphere, vendors.

Contacts not currently in a follow-up workflow — past clients, friends, vendors, referral partners. Kept for reporting and hand-picked outreach.

Junk

Bad data, not a real lead.

Fake registrations, duplicates, bots, agents fishing for listings. Removed from all filters and automation.

Do Not Contact

Opted out of outreach.

Explicit unsubscribes or requests to stop. Blocked from all automation, surfaced in compliance reports.

Closed

Deal complete — transaction closed.

Lead converted, contract closed, transaction recorded. Surfaced in pipeline and revenue reporting; eligible for sphere nurture later.

Pending

Under contract, not yet closed.

Deal in progress — offer accepted, awaiting close. Held in a holding state so it doesn't get touched by general nurture while inflight.

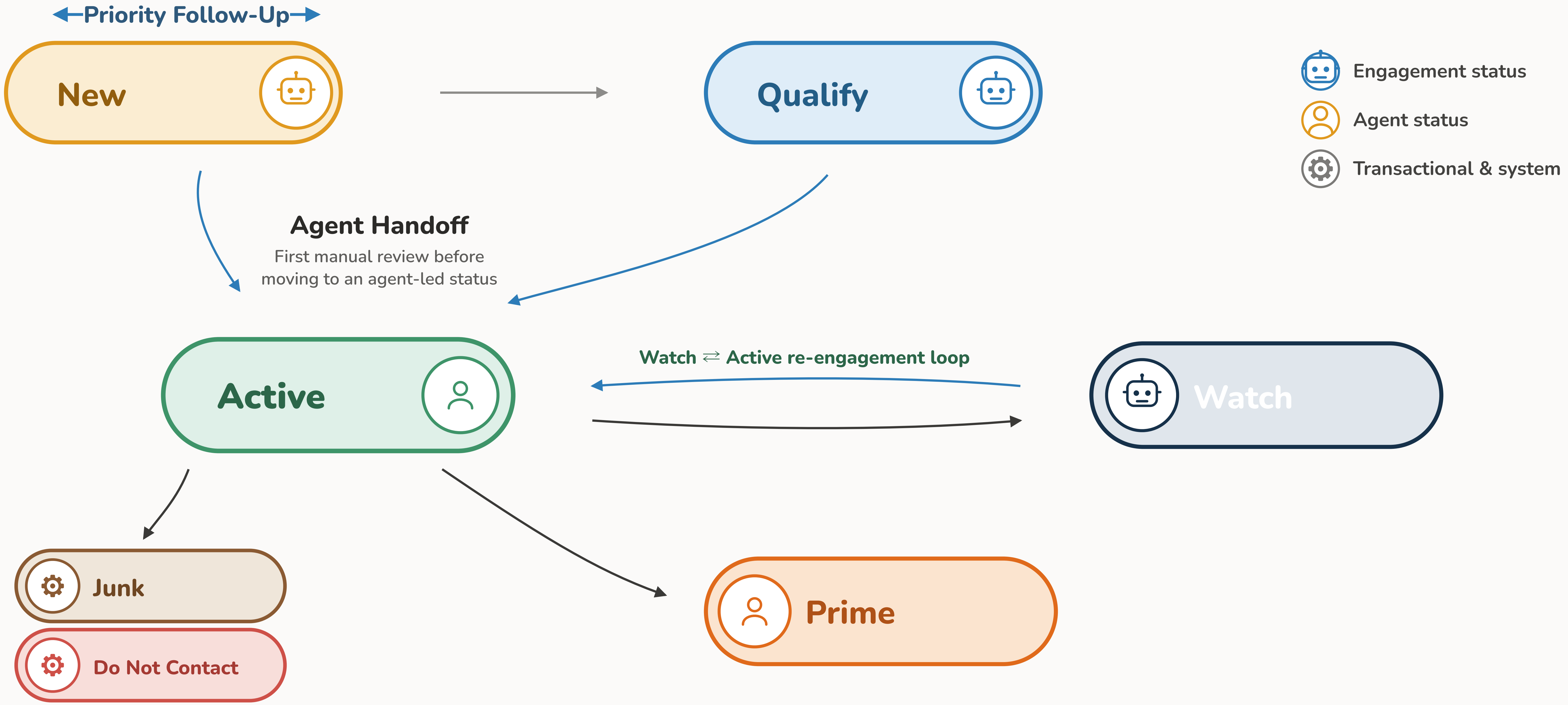
—

Five total transactional statuses.

None of these trigger automation. They exist purely to organize the database and feed your pipeline and revenue reports.

How leads flow through the system.

Automation runs the front end. Agents take over at Active — that's where every qualifying decision happens.



The 30-day priority window.

The system is engineered around the first 30 days. Here's why — and how it works.

Consistency increases response rate.

The system stacks coverage across all 30 days — filters surface the right leads, plans send touches in the background, behavioral triggers flag activity in real time. The system makes consistency possible. The follow-through is on you.

Days 1-7

🎯 PLA New

Daily agent call — clears each morning.

The most intensive window. One outbound call per day until contact is made or the 7-day window closes. Lead drops from the filter as soon as the call is logged.

Days 8-30

📞 New | Connect

Call every 3 days.

The back half of the priority window. Personal calls every 3 days to keep momentum while the automated plan handles digital touches in parallel.

All 30 days

🔁 Background coverage

Automated plan + behavioral triggers.

The 30D Qualify action plan runs email + text touches throughout. Any behavioral signal — saved property, multiple listings, return visit — surfaces the lead in **PLA Active** for immediate engagement.

Day 31 Lead exits New status. Moves to **Qualify** if no contact was made, with the Qualify-Engage filter taking over surfacing.

Watch status: four timeframe workflows.

Add the right tag and leads route into the matching long-term follow-up system.

Timeframe: 3 to 6 Months

3 – 6 months

MID-TERM NURTURE

Steady messaging cadence. Behavior triggers are more sensitive — lower activity levels can fire tasks and agent alerts sooner.

SENSITIVE TRIGGERS

Timeframe: 6 to 12 Months

6 – 12 months

LONG-TERM CADENCE

Long-term nurture. Activity is monitored but thresholds are higher, so only real buying signals break through the noise.

MODERATE TRIGGERS

Timeframe: 12+ Months

12+ months

LIGHT-TOUCH

Designed for future buyers. Only strong behavior indicators trigger alerts — helping you stay focused while keeping the lead warm.

STRONG TRIGGERS ONLY

Timeframe: No Timeframe

No timeframe

FLEXIBLE PLAN

Used when a lead is interested but hasn't given a clear window. Tasks are triggered only by higher activity thresholds.

ACTIVITY-DRIVEN

Priority Lead Alerts.

Six behaviors trigger alerts when leads are in New, Qualify, or Watch — the system fires alongside the agent.

Triggering behaviors

- Clicked consecutive listing alerts
- Returned to site
- Multiple listing views
- Requested more info
- Saved a property
- Scheduled a showing request

PLA task assigned

Lead appears in the PLA Active filter for immediate engagement.

Auto-engagement plan activated

Automated text + email touches the lead with behavior-specific messaging.

System-managed = automation fires.

For Engagement statuses (New, Qualify, Watch), the system actively works the behavioral signal in parallel with the agent.

Behavioral notifications.

When leads are in Active, Prime, Past Client, or SOI — automation pauses, but signals still surface.

Agent-managed statuses don't get auto-engagement plans triggered by behavior. But the behavioral signal still matters — so the system surfaces it as a **task** with a formatted note on the contact page, letting you fold the activity into your existing conversation or relationship.

Tasks fire when

- Multiple listing views (3+ / 5+ depending on status)
- Saved a property
- Site return (status-specific threshold)
- Showing request
- More info request

Notes log

- Any monitored behavior creates a formatted note on the contact page
- Builds a behavioral history for context
- Visible whenever the agent opens the contact

Task = action required. Note = context for when you act.

Tasks land in Sierra's main task manager with a clear "Priority Behavior Alert — Check Contact Notes" prompt. The contact page note tells you exactly what triggered it.

Run the Day.

Seven filters. One sequence. Every day — worked left to right, from highest priorities to consistent outreach.

01

🎯 PLA New

New leads in their first 7 days. Make a daily call to clear.

NEW · DAY 1–7

02

🔥 PLA Active

Leads showing behavioral signals — site visits, listing views, saved properties. Engage by call, text, or email.

PRIORITY · ACTIVE

03

💬 Conversations

Active leads in current conversation. Qualify their timeframe and move them forward — Active is temporary, max 7 days.

ACTIVE · MAX 7 DAYS

04

🔔 Nudge Needed

Active leads not contacted in 3+ days with no scheduled task. Engage & qualify before they cool off.

3+ DAYS

05

📞 New | Connect

New leads in days 8–30 of their priority window. Call to make personal contact — plan handles email and text.

NEW · DAY 8–30

06

💡 Qualify | Engage

Unresponsive leads still actively visiting the site. Call, text, or email — agent choice based on lead behavior.

QUALIFY

07

👥 Watch | Nurture

Watch leads not called in 30+ days. Maintains a 30-day call cadence and 90-day conversation lock.

WATCH

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Continued →

Accountability & relationship filters on the next pages.

Accountability & management filters.

Task-driven filters that surface leads falling through cracks — missed follow-ups, missing automations, orphaned tools.

08

🏆 Prime Check

Prime leads not contacted in 7+ days. Quick check-in to maintain momentum.

PRIME 7-DAY

09

📋 Needs Action Plan

Leads in New, Qualify, or Watch without an action plan. Assign a Fully Automated Action Plan.

MISSING PLAN

10

🏠 Needs E-Alert

Buyer leads without an E-Alert. Set up property alerts to keep them engaged.

BUYERS

11

📊 Needs Market Report

Seller leads without a Market Report. Set up updates to keep them engaged.

SELLERS

Rule of thumb

If a lead has the status but not the tool — it's in one of these filters.

Run these weekly. They catch the gaps automation can't close on its own — missing plans, missing alerts, missing reports — before they cost you a deal.

Relationship filters.

Long-cycle contacts that aren't part of your lead flow but deserve consistent touchpoints.

12

🤝 Past Client | Call Check

Past clients not called in 90+ days. Maintain the relationship with a check-in.

PC 90-DAY

13

⭐ SOI | Call Check

Sphere contacts not called in 90+ days. Stay top of mind with a personal call.

SOI 90-DAY

Relationships compound.

Past clients and sphere contacts are your highest-trust audience — and your most-overlooked. These two filters keep them from going dark.

How tags work.

The agent's tag toolkit — what to apply, when to apply it, what happens next.

Tags are how you steer the system. Apply the right tag and the right plan kicks in, the lead routes to the right filter, and the right cadence takes over. Two pages of tags to know, organized by what they do.

Classification & Routing

Tags that **classify** the lead and route them into the matching workflow.

`Lead Classification` `Timeframe` `Call Plans`

Workflow Triggers

Tags that **trigger** a specific action plan based on lead behavior or situation.

`Reactivate` `Ghosted` `Has Agent` `Already Bought`

A few tags get applied by the system automatically — behavioral activity, communication tracking, and service-managed flags. You'll see them on the contact page but you don't manage them. If you spot a tag you don't recognize, it's probably one of those.

Classification & routing tags.

Tags that define the lead's category and route them into the matching workflow.

LEAD CLASSIFICATION

`Past Client`

Classifies the lead as a past client.

💡 Apply after a deal closes — surfaces them in Past Client | Call Check.

`SOI`

Classifies the lead as a personal-network contact (Sphere of Influence).

💡 Friends, family, referral partners. Surfaces in SOI | Call Check.

`Renter`

Classifies the lead as a current renter, not in market.

💡 Apply on confirmed renter status. Used for exclusions and nurture.

TIMEFRAME NURTURE · ALL → WATCH

`Timeframe: 3 to 6 Months`

Assigns the 3–6 month long-term nurture plan.

`Timeframe: 6 to 12 Months`

Assigns the 6–12 month nurture plan.

`Timeframe: 12+ Months`

Assigns the 12+ month nurture plan.

`Timeframe: No Timeframe`

Assigns the nurture plan for leads with no clear window.

→Every Timeframe tag updates status to Watch.

CALL PLANS

`P1 Call Plan`

Weekly calls × 90 days.

`P2 Call Plan`

Bi-weekly calls × 180 days.

`P3 Call Plan`

Monthly calls × 365 days.

`P4 Call Plan`

Quarterly calls × 2 years.

Workflow trigger tags.

Tags that trigger a specific action plan based on lead behavior or situation.

`Reactivate`

Assigns the Buyer or Seller Reactivation Campaign.

💡 Re-engaging old or unresponsive leads (30+ days since last activity).

→ **Updates status to Qualify.**

`Ghosted`

Assigns the Buyer or Seller Ghosted Action Plan.

💡 Nudge leads who went silent after recent engagement (~7 days).

→ **Updates status to Qualify.**

`Has Agent`

Assigns the Has Agent Action Plan.

💡 When a lead says they're working with another agent.

→ **Updates status to Qualify.**

`Already Bought`

Assigns the Already Bought Action Plan.

💡 When a lead has already purchased.

→ **Updates status to Qualify.**

All workflow trigger tags move the lead to Qualify.

This signals the lead is still in your system but no longer in the active priority window — let the assigned plan do the work.

Next steps.

01 **Work your daily filters.**

Work the Run the Day sequence left to right: PLA New → PLA Active → Conversations → Nudge Needed → New | Connect → Qualify | Engage → Watch | Nurture. Same order, every day.

02 **Run accountability weekly.**

One sitting on Monday: Prime Check, Needs Action Plan, Needs E-Alert, Needs Market Report, Past Client | Call Check, SOI | Call Check. Close every gap.

Need help?

We're rolling out weekly open office hours and a full training library to support your team. More on those soon. In the meantime, reach out anytime.

Support

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