



## Making the most from PropSpace Lead Pool

The Lead Pool feature allows Managers and Admins to add existing leads to a common pool, which can be viewed by other agents, and if they see fit, assign leads from the common pool of leads to themselves.

The feature is highly customizable, allowing you to decide whether Agents should have access to this pool, and even to limit the number of leads from the Lead Pool that can be assigned in a day.

### Why use the Lead Pool?

The Lead Pool feature increases efficiency in the lead conversion process, ensuring that leads that are moving slowly or ineffectively are being attended to by other agents who may stand a better chance of converting that lead.

### Enabling the Lead Pool:

This feature can be enabled from the Admin -> Profile screen, under the Leads tab. You can set the 'Lead Pool' setting to 'Enabled'. This will allow only Admin and Manager users to view the Lead Pool and add Leads to it.

A screenshot of the PropSpace Admin Profile settings for the Lead Pool feature. The settings are displayed in a light grey box with a white background. There are three settings, each with a help icon (a small 'i' in a circle) to its right. The first setting is 'Lead Pool', with a dropdown menu currently set to 'Enabled'. The second setting is 'Lead Pool for Agents', with a dropdown menu currently set to 'Enabled without Contact Details'. The third setting is 'Lead Pool Limit (Per Day)', with a text input field containing the number '5'.

You can further customize the functionality of this feature by choosing to allow Agents to view the Lead Pool. Doing so allows them to assign themselves any leads from the Lead Pool. If it is preferred that Agents are not able to view the contact details for leads in the



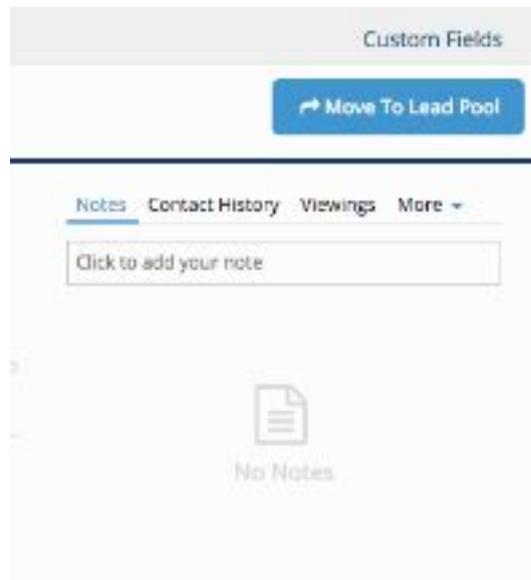
Lead Pool, simply select 'Enabled without Contact Details'. This will ensure that they are able to view the contact details only once they have assigned the lead to themselves.

Another setting that can help restrict usage of the Lead Pool is the Lead Pool Limit. This limits the number of leads agents can assign to themselves from the lead pool each day. Set it to 0 for unlimited usage. The recommended setting is 5 or less based on the lead volume received. Higher limits can be used based on your company's strategy.

Please note that the 'Lead Pool' setting needs to be enabled for the other related settings (Lead Pool for Agents and Lead Pool Limit) to be functional.

### Moving leads to the Lead Pool:

Admin and Manager users can add Leads to the Lead Pool manually by selecting the lead they need to add, and clicking on the blue 'Move To Lead Pool' button on the top right of the lead.



Alternatively it is also possible to automate the addition of leads to the Lead Pool. This can be achieved using Automations, as illustrated in the example below.

Scenario:

Your company requires all leads that have had no progress for two days to be added to the Lead Pool, so that other agents can accept and work on them, making the lead conversion process more efficient.

Setup:

First, ensure all the required settings are enabled. In this case, Lead Pool and Lead Pool for Agents should both be enabled.



Now, an automation needs to be created from Admin -> Automations. Navigate to the Advanced Automations tab to get started.

Click on 'New Automation' and follow the below steps to configure the automation:

1. Set a simple, self explanatory name for the new rule, e.g. 'Move leads not updated for 2 days to Lead Pool'
2. Select 'Leads' as the module
3. Set Status to 'Active' so that the automation starts working once you save it
4. Set the trigger to 'is not Updated' and trigger timing to 2 days
5. Set the field to 'Sub Status', operator to 'Contains' and value to 'Not yet contacted' - this will ensure that all leads whose Sub Status has not been updated from 'Not yet contacted' for two days, will trigger the automation
6. Select the action timing as 'Immediately'
7. Set Action 1 to 'Update Record'
8. Set field as 'Lead Pool', and change to as 'Yes'

Please double check your rules before activating them. Once you're sure about the rules, click Save Automation, and it is now in effect!

