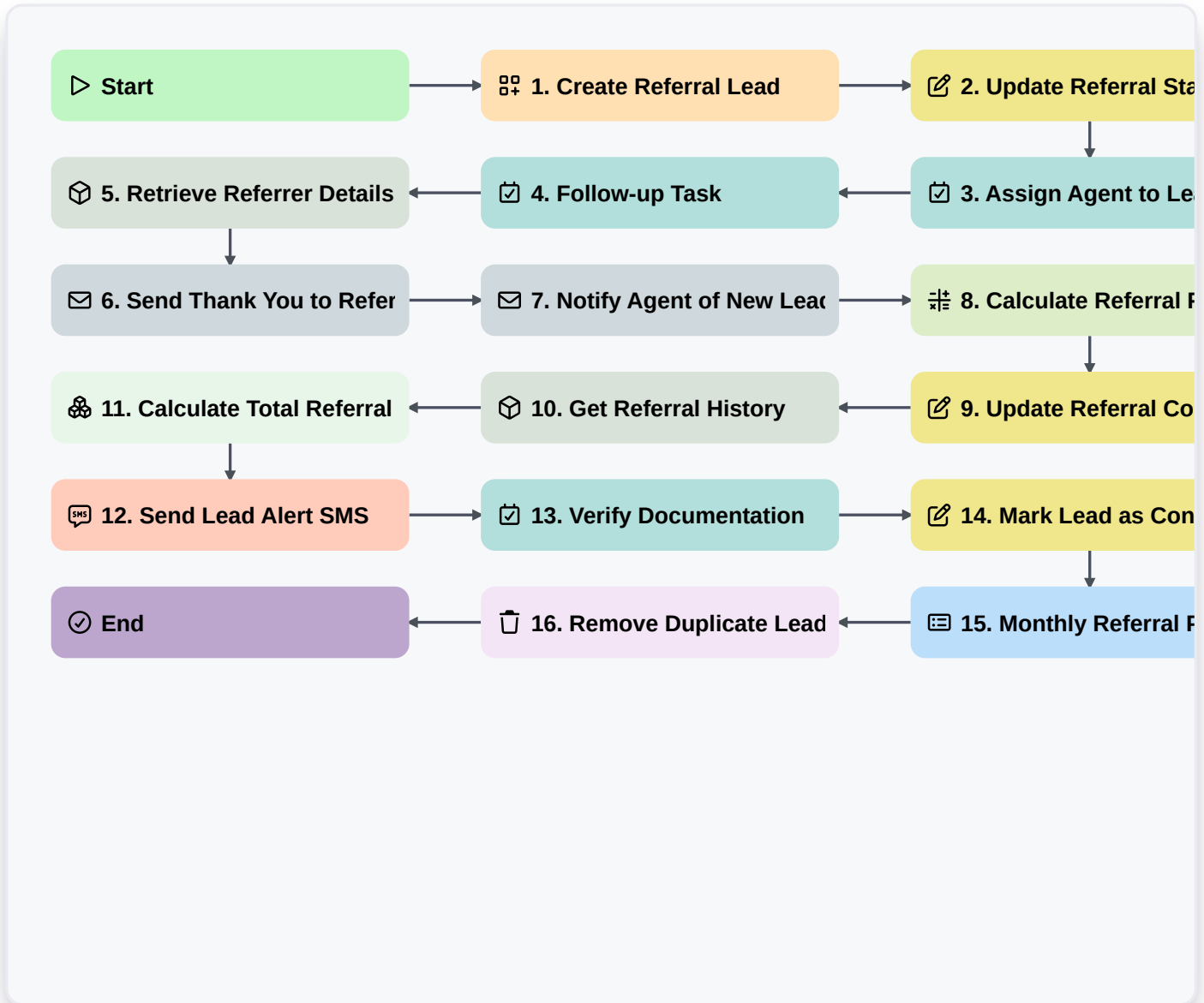


# Real Estate Referral Management Process



## Start

Start of the Workflow/Process.

## 1. Create Referral Lead

Create a new entry in the 'Referrals' data model when a new lead is identified.

## 2. Update Referral Status

Update the status of the referral entry (e.g., from 'New' to 'Contacted' or 'Converted').

## 3. Assign Agent to Lead

Create a task for a real estate agent to perform the initial outreach to the referral.

## 4. Follow-up Task

Create a recurring task to check in with the lead if no contact has been made within 48 hours.

## 5. Retrieve Referrer Details

Fetch contact information and history of the person who sent the referral.

## 6. Send Thank You to Referrer

Send an automated email to the person who provided the referral to acknowledge receipt.



### **7. Notify Agent of New Lead**

Send an email notification to the assigned agent containing lead details.

### **8. Calculate Referral Fee**

Calculate the commission split or referral fee amount based on the estimated property value.

### **9. Update Referral Commission**

Update the 'Referral Fee' field in the Referral entry with the calculated value.

### **10. Get Referral History**

Retrieve all previous successful referrals from the same source to assess lead quality.

### **11. Calculate Total Referral Volume**

Sum the total value of all 'Closed' referrals within the current month.

### **12. Send Lead Alert SMS**

Send an urgent SMS to the agent when a high-priority referral is entered.

### **13. Verify Documentation**

Create a task to ensure all necessary legal and contact documents are uploaded to the entry.

### **14. Mark Lead as Converted**

Update the referral entry to 'Closed/Won' once a property transaction is completed.

### **15. Monthly Referral Performance Report**

Generate a report summarizing conversion rates, total revenue, and top referrers.

### **16. Remove Duplicate Leads**

Delete a referral entry if it is identified as a duplicate of an existing record.

### **End**

End of the Workflow/Process.