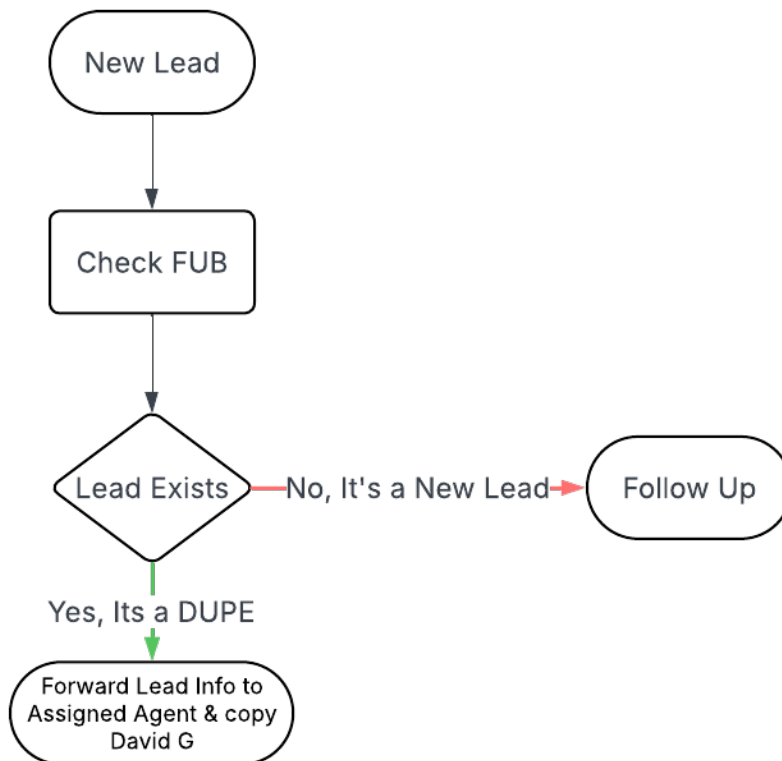


Lead Handling & Duplication Protocol

Why This Matters

Because our systems are not fully integrated, it's easy to mistake a duplicated lead for a new one. Some platforms only push leads into Follow Up Boss (FUB) and lack the context of prior activity. FUB is our source of truth — it centralizes all lead activity, maintains the official assignment, prevents duplicate contacts, and logs every event.

✦ Please refer to the following diagram for a visual summary:



Common Issue

"I see leads in Real Geeks that aren't in my FUB dashboard."


This happens because Real Geeks doesn't verify whether the lead already exists. It simply pushes new registrations into FUB without checking for prior history or ownership.

Step 1: Understand the Ecosystem

We receive leads from both digital and non-digital sources:

 Digital Sources (automatically synced to FUB):

- Boardwalk IDX (boardwalkrealtypv.com)
- Real Geeks – Condo Site (puertovallartacondosearch.com)
- Real Geeks – House Site (puertovallartahousesearch.com)
- Lofty

 Non-Digital Sources (must be manually entered into FUB):

- Walk-ins
- Office calls
- Sign calls
- Print ads

! Any lead from a non-digital source must be manually entered in FUB, and may already exist under another agent.

Step 2: When You Receive a New Lead

Before taking any action:

1. Open FUB
2. Use the global search bar to look up the lead by name, phone number, or email

! If the lead is already assigned to another agent in FUB, do not contact them.

Step 3: If the Lead Already Exists in FUB

✓ Do this:

- Search FUB to confirm the assignment
- Notify the assigned agent
- Forward relevant context (properties viewed, source, messages)
- CC David G if the lead came from Real Geeks

✗ Do NOT:

- Engage the lead if it's not assigned to you
- Attempt to reassign the lead manually in Real Geeks
- Assume a lead is yours just because it's in Real Geeks

Special Note on Real Geeks Assignments

Each Real Geeks site has its own user list:

- Some agents are only active on one site
- A lead may register on both, resulting in conflicting assignments
- FUB maintains true ownership regardless of Real Geeks
- Only David G can adjust Real Geeks assignments, and only between users on the same site

✦ Example: Leads from RG Site 1 (Condos) cannot be reassigned to users on RG Site 2 (Houses), and vice versa.

Real-World Example #1: A Lead Duplicated 4 Times

Meet: Patrick Smith

1. May 1 – Registers on Boardwalk IDX. Assigned to Aimee Lezama.
2. May 3 – Registers again on puertovallartahousesearch.com. Assigned to Mike Green.
3. May 5 – Registers again on puertovallartacondosearch.com. Assigned to John Swanson.
4. May 6 – Calls a property sign. Ever, doing floor time, checks FUB and sees Patrick is already assigned to Aimee.

FUB attaches all activity to Aimee's original lead profile. Only Aimee should engage with Patrick. Mike, John, and Ever must forward all relevant info (activity, messages, property views) to Aimee and CC David G.

Real-World Example #2: Duplicate via Both Real Geeks Sites

Meet: Samantha Davis

1. July 1 – Registers on puertovallartacondosearch.com. Assigned to John Swanson.
2. October 12 – Registers again on puertovallartahousesearch.com. Assigned to Mike Green.

FUB matches her email and logs the new activity under John's profile. Mike should search for Samantha in FUB, confirm she's assigned to John, forward any relevant info to John, and CC David G.

Special Considerations

- Multiple emails = multiple leads: FUB may not detect duplicates across emails
- Family members or partners: separate registrations may not be linked automatically
- Client requests to switch agents: if a client requests reassignment in writing, David G or Mike Green can make the change in FUB

🤝 Be flexible with fellow agents — What Goes Around... Comes Around. It's best to arrange a referral or agreement between agents, but that's personal and not handled in this SOP.

Agent Checklist

- Search in FUB (name, phone, or email)
- Use global search if needed
- If lead is already assigned:
 - Don't contact them
 - Forward context to the assigned agent
 - CC David G (if from Real Geeks)
- Don't reassign leads manually
- Don't assume a Real Geeks lead is yours until you verify in FUB