7. Lead Delivery 101

3. Pre-Launch · https://clients.financevine.ca/docs/lead-delivery-schedule-pacing/

FinanceVine emphasizes a **consistent** lead delivery pace, designed to give their agents the best chance to convert leads into clients. Here's a breakdown of their scheduling and delivery approach:

1. Monthly Lead Volume:

- **Flexible Options:** Agents will choose to receive 20+ leads per month, depending on their capacity and growth goals. After the initial 90-day period you will scale up to what your bandwidth will allow. 20 leads is the starting point, we expect individual agents to at least double that capacity after 90 days if not more.
- **On-Demand Scaling:** FinanceVine offers flexibility to increase lead volume as needed, allowing agents to adapt to changing market conditions or business needs.

2. Consistent Delivery:

- **Predictable Flow:** Leads are delivered consistently throughout the month rather than in batches, ensuring a steady stream of opportunities for agents.
- **No Lead Sharing:** Each lead is exclusively assigned to a single agent, eliminating competition and maximizing the chance of conversion.

3. Real-time Delivery:

- **Instantaneous Handover:** As soon as a lead completes the form and verifies their phone number, the agent is notified via email and receives the lead's information in their lead sheets. Optionally, into the agent’s **CRM via Zapier integration.**

4. Prioritized Communication Channels:

- **Emphasis on Texting:** Recognizing the dominance of text communication in the modern day, FinanceVine prioritizes text message delivery and encourages agents to engage with leads via this channel. Exclusively calling someone will not lead to success and is fact, a massive waste of time. Text is king.

- **Multi-Channel Approach:** While texting is emphasized, leads also receive emails and can call a forwarding number, providing multiple avenues for connection.

5. Agent Empowerment:

- **Full Lead Information:** Agents receive comprehensive lead information, including contact details, preferences, and initial questions, enabling personalized and effective communication.
- **Automated introduction:** FinanceVine's system handles initial introduction communication, reminding leads about the consultation and encouraging engagement, reducing the burden on agents.

Benefits of FinanceVine's Approach:

- **Increased Responsiveness:** Real-time delivery and prioritized communication channels enable agents to connect with leads quickly, increasing the likelihood of engagement.
- **Improved Conversion Rates:** Consistent lead flow, exclusive assignments, and agent empowerment tools contribute to higher conversion rates.
- **Reduced Agent Workload:** Automated introduction and comprehensive lead information streamline the agent's workflow, allowing them to focus on building relationships and closing deals.
- **Scalability and Flexibility:** The ability to adjust lead volume on demand provides scalability for agents to grow their business at their own pace.

Key Takeaway: FinanceVine's lead scheduling and delivery process is designed to maximize agent efficiency and conversion rates. By providing a consistent flow of high-quality leads, empowering agents with the right information and tools, and prioritizing rapid communication, FinanceVine creates a favorable environment for agents to succeed.