

Reverse Prospecting in Matrix

Reverse prospecting shows which buyer agents have clients looking for properties that match your listing. Those clients may have received the listing in an Auto Email or found it themselves in OneHome - so you know which agent to follow up with. You need an active listing to reverse prospect.

Note: Client names and personal details are never shared. Results use a Ref # instead. The buyer agent can look that number up on their Contacts page, so you can discuss the same client without either of you revealing who they are.

Run reverse prospecting

1. Open My Matrix > My Listings in Matrix.
2. In Show, select My Active Listings.
3. Select the checkbox next to the listing you want to reverse prospect.
4. Select Reverse Prospect on the button bar.
5. Review the reverse prospect results for that listing.

What the results mean

Matrix shows one row per buyer-agent contact who has received your listing. Columns include:

- Agent - The buyer agent whose contact received your listing (or matched it). Select the agent name to email them about the listing.
- Ref # - A reference number for that client on the buyer agent's Contacts list. Use it when you call or email so they can look up the right person without you ever seeing the client's name or contact details.
- Pre-approved? - Whether that contact is marked as mortgage pre-approved.
- Count - How many listings have been sent to that contact in total (not only yours).
- Date Sent - When the buyer agent sent your listing to their client.
- Prospect Interest Indicator (folder icon) - Shows whether the client showed interest (for example liked or favourited the listing in the portal).
- Email, Office Name, and Phone - Contact details for the buyer agent, so you can reach them.

Tips

- Reverse prospecting is only available for on-market listings (Active or Conditional).
- There are two layers of reverse prospecting settings: on the contact, and on each Auto Email search. The contact must allow reverse prospecting, and the Auto Email for that search must have it enabled as well.

Source: <https://support.itsosystems.ca/kb/109>