

Welcome to the VDT Referral Agent Network!

Director of Operations

- She oversees the Referral Department.
- Bobbi is the liaison between Lenders and Agents. so if you have any concerns please reach out to her at bobbi@valleydreamteam.com.
- Once Under Contract, please share all updates pertaining to the transaction with Bobbi and Sara. Especially updates concerning contract price, close of escrow and cancellations. Please add Bobbi to lender/title email chains.
- Any other lead updates should still be directed to Amy.

Bobbi Engle (480) 510-1103 bobbi@valleydreamteam.com

Amy Alvarez (480) 788-5023

amy.alvarez@valleydreamteam.com

Client Success Manager

- She will request regular updates on leads we have shared with you. She will follow up on weekly update texts.
- If you are unable to connect initially with the lead Amy should be notified within 24 hours.
- Once you first initially connect with the lead notify us by clicking reply all to the initial email. Future updates will be sent to Amy at Referrals@vdthomes.com.
- Regular follow up calls with leads to ensure the process is going smoothly.



Sara Dejesus (480) 886-4687 Sara@valleydreamteam.com

Operations Assistant

- She makes outbound calls and sends texts to realtors in key target areas to establish referral partnerships and provide an overview of our company operations.
- Assigns leads to our Referral Network Agents.
- Once a Referral agent goes Under contract she sends the referral form link for referral agents to complete.
- Once Under Contract, please share all updates pertaining to the transaction with Bobbi and Sara.
- She will request a copy of the referral check.

Amy will request subsequent follow-ups on all individual leads. VDT will also be sending weekly update request text. Receive VDT Buyer or Call the Loan Reply to the initial Seller assignment Officer to gather email, agreeing to the email with a loan details and referral fee and provide personalized Start initiate your service areas. introduction text. collaboration. Update Amy on the connection with the lead Gather necessary needed loan documents and loan structure details. Call the lead with high motivation to Proceed with Did the Loan get them on the Yescollaboration Officer answer? phone. Connect details within 2 days calls, emails, and text. Contract accepted!! Share Continue the joy and let No monitoring and Amy/Sara know follow-up right away!! Maintain contact with both lender/lead and Amy. With any issues getting connected with the loan officer please reply all to the initial email with -Noleads info expressing issue. Please "REPLY ALL" to the original email with the lead's information to Yes notify you reached out and coordinate a time with the loan officer to call back Transaction Give subsequent Sara will be sending a Closes and Complete the follow ups on UC Referral Form link for Once Under contract updates referral form link Status to Bobbi and Another Dream you to complete will go to Bobbi and Sara Achieved! Sara.