**REAL GEEKS BEST PRACTICES**

**Minimum Standards & Practices to Follow**

* Visit the [Real Geeks Docs Page](http://docs.realgeeks.com/start#follow_up_scripts) for Template Emails, Scripts, VM Messages
* Set up SMS Autoresponder within the Real Geeks CRM for your different lead sources, watch Video to learn how to set this up (LINK)
* **IMPORTANT! Clear your “Scheduled follow-ups” DAILY**
  + Always clear your “daily activity” from your dashboard
  + Follow-up on your WARM and HOT leads from your leads tab
  + Follow-up on your “User Behavior” filters from your leads tab

1. **New lead in Real Geeks CRM - Agent follow-up**
   * **AUTORESPONDERS** are sent to lead

* Real Geeks website will automatically send a “**Thanks for Signing Up!”** **autoresponder email** to your lead
* Real Geeks CRM will automatically send a **SMS text message autoresponder** to your lead (if you’ve added your SMS text autoresponder for each lead source)
  + **CALL** lead within 5 minutes or less
* IF the lead doesn’t answer, THEN hang up and wait 15 seconds, call a 2nd time
* IF the lead doesn’t answer, THEN hang up and wait 15 seconds, call a 3rd time
* Leave a voicemail on the 3rd attempt, use [“Voicemail Script”](http://docs.realgeeks.com/voice_mail_script)
  + **ADD ACTIVITY** as “Called” or “Left Voicemail”
    - IF you do not reach lead, THEN try throughout the day if possible
    - IF you do not reach lead, THEN schedule a 2nd follow-up for the next day
    - IF you do not reach lead, THEN schedule a 3rd follow-up for the next day
  + **SEND EMAIL,** use template[“Email follow-up - Tried Reaching You”](http://docs.realgeeks.com/email_follow_up)
    - IF you do not reach lead on the 3rd day, THEN schedule a follow-up for 5-days later
  + **YOU REACHED THEM!**
    - Follow the [“Internet Lead Script”](http://docs.realgeeks.com/internet_script), make sure your script has seller questions!
    - Make sure you ask if they need to sell a home! Remember leads are sellers too!
    - Add **IMPORTANT NOTES** in the record
    - Add **PROPERTY DETAILS** to important notes, regarding what they are searching for
    - Schedule next **FOLLOW-UP** date
    - IF moving in less than 90-days, THEN set an appointment to meet them!
    - Add **TIMEFRAME**
    - Add **SECONDARY CONTACT** info, if applicable
    - Add lead **TYPE**
    - Add lead **STATUS**
    - Add lead **URGENCY,** see how we use URGENCY below
      * COLD- If the lead is “dead” and you don’t feel you’ll be able to convert them into a client. **Note:** You are less likely to follow up later if searching active users which you marked “cold” so do not mark leads as cold unless they are dead
      * WARM- If the lead is going to do something within 45-120 days
      * HOT- If the lead is going to do something, for sure, within 30-45 days
      * NOT CONTACTED- If the lead phone number is good, and no contact was made
      * CONTACTED - If lead was contacted, but is not “warm” or “hot”
    - Add **TAGS**
    - **LOGIN AS USER** while on the phone with them and help the buyer if they need it
    - Look for opportunities to help them with their saved searches and provide a better, more valuable experience
    - Send them a thank you **EMAIL**
    - Send them a handwritten thank you **NOTE**
* **How to schedule a follow-up for all HOT, WARM, or CONTACTED LEADS**
  + Select **PURPOSE** (call, email, etc...)
  + Put in **TITLE** - name, purpose of call (as much info as possible)
  + Select **DATE**
  + Leave as many notes as needed
  + **SAVE**
  + Suggested follow-up cadence:
    - Follow-up with HOT leads 1x a week, until you set an appointment.
    - Follow-up with WARM leads every 2 weeks, until you set an appointment.
    - Follow-up with CONTACTED leads every 1 to 3 months, until you set an appointment. The warmer leads will also appear in your “Active Users” and “Favorited Property” user behavior follow-up tabs
* **IF phone # is wrong**
  + **SEND EMAIL,** use template[“Email follow-up - Tried Reaching You”](http://docs.realgeeks.com/email_follow_up), but don't have a good phone #
  + **MARK** lead as “wrong #” - Simply check the box & update
  + Later, if “wrong #” leads are actively using site – **SEND EMAIL,** use template [“Email follow-up - Active Lead”](http://docs.realgeeks.com/active_lead_email_follow_up)
  + No need to set up **NEXT CONTACT DATE**, they will show up when you are follow up on “Active Leads”

* **Bad contact info - name, phone, email**
  + If ALL are bad Mark them **DEAD** under **STATUS** & forget about them!!
  + If the lead reaches out to you in the future, then make sure to **CORRECT** their email in the CRM and set them up on property search alerts by logging in as them on your website.

1. **“FAVORITED PROPERTY” User behavior follow-up**
   * Create a “favorited property” tab within your CRM (instructions are below) -or- Click on the link from your “daily follow up reminder” emails
   * **CALL** this list of leads daily
   * IF you do not reach them, THEN send them a template email [“Email Follow-up – Favorited Property”](http://docs.realgeeks.com/favorite_property_added_lead_email_follow_up), and an SMS text message
   * **How to create a “Favorited Property” tab in the CRM**
     + “Last Favorited Property” is within the last “1” day
     + “Last Communication date” is older than “14” -or- “21” days
     + Click on “Save search” and title it “Fav FU” to create an advanced search tab to click on and follow-up daily to work through this leads.
     + **Note:** Watch our “Real Geeks Best Practices” video to see how to do this
2. **“ACTIVE USERS” User behavior follow-up**
   * Click on the “Activity Today” tab within your CRM (you can add additional filters, instructions are below)
   * **CALL** this list of leads daily
   * IF you do not reach them, THEN send them a template email [“Email Follow-up – Active Lead”](http://docs.realgeeks.com/active_lead_email_follow_up), and an SMS text message
   * **How to create a custom “Activity Today” tab in the CRM**
     + **“**Last Active Date” is within the last “1” day”
     + “Last Communication date” is older than “14” -or- “21” days
     + Click on “Save search” and title it “Active Today 14” to create an advanced search tab to click on and follow-up daily to work through this leads.
     + **Note:** Watch our “Real Geeks Best Practices” video to see how to do this

* **MORTGAGE PARTNER can help with qualifying and follow-up**
  + Agent and Lender can share activities & notes within the Real Geeks CRM, and system can notify them of these events
  + Lender should call leads to qualify and set appointments for agent
  + If Lender contacts leads, then they should mark Urgency & add Important Notes in the lead detail
* **WHO TO MEET WITH**
  + Meet with sellers/buyers who are moving in 90 days or less
  + Meet with Pre-Approved Buyers
  + If possible, try to get a consultation appointment first. This is a great time to get a buyer agency/loyalty agreement signed.
* **Minimum GOALS and EXPECTATIONS**
  + Reach all of your leads on the day they arrive - Goal is 3-5 minutes
  + Contact at least 10 people per hour when doing lead follow-up
  + Set at least 3 appointments per week – shoot for 20 contacts to 1 appointment
  + Call Active Leads plus Hot & Warm leads 2 hours per day (minimum)
  + Stick to the scripts so can be effective and more productive
  + Manage your time well - stay on task when lead generating and lead follow-up are being completed!
  + Always cut buyers/sellers time frame in 1/2. If they say they’re moving in a year, set a NEXT CONTACT date for 6 months.
  + The standard ROI for every 100 leads is a minimum of 3-5 closings. A 60-90 day startup period is typical.
  + Email never counts as a contact!!
  + Accountability is crucial when managing a team. Make sure you’re using some sort of tracking for leads contacted, appointments set and contracts written.