**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.