REAL GEEKS BEST PRACTICES
Minimum Standards & Practices to Follow

- Visit the Real Geeks Docs Page 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"
    - **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"
        - 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", 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", 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"

- 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.

2. "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", 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

3. "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", 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.