**REAL GEEKS BEST PRACTICES – Jeff Manson advices to use

\*\* See** [**http://docs.realgeeks.com**](http://docs.realgeeks.com) **for Template Emails, Scripts, VM Messages**

**LEAD ARRIVES - AGENT FOLLOWUP**

- Call within 5 minutes

- Leave VM Message \*See VMScript
- ADD ACTIVITY Called or Left Voicemail
- SEND EMAIL from Template Email that you tried to reach them – \*\*See Docs

- If do not reach - call again in 10 minutes

- If do not reach - call again in 15 minutes

- If do not reach - call again in an hour

- If do not reach - call again in 2 hours

- If do not reach - call again before the day ends

- Use multiple phone #s - Remember your broker number (if at office) may display office info on caller ID

\*\*Once you reach them, use the script - see below for YOU REACHED THEM

**COLD WARM HOT** - how we use URGENCY

- COLD – Do Not Mark Cold (you are less likely to follow up later if searching active users if you marked cold) possibly if all lead info is wrong dead lead

- WARM – If You feel they are going to do something

- HOT – Going to do something for sure or within 90 days

- NOT CONTACTED – If number is good and no contact

- CONTACTED – To indicate there was contact, but they are not Warm or Hot

**BAD EMAILS THAT YOU FIX**

- If you fix a "bad" email address - you have to also LOGIN AS USER and fix on website

**IF PHONE # IS WRONG**

- Send TEMPLATE EMAIL tried to reach you, but don't have a good phone #
- MARK lead WRONG # - Simply check the box & Update

- Later if wrong # leads are actively using site – Send ACTIVE LEAD Template Email

- No need to set up NEXT CONTACT DATE – They will show up when you are following up on Active Leads

**BAD CONTACT INFO - NAME, PHONE, EMAIL**

- Mark them DEAD under STATUS & forget about them!!

**NOT CONTACTED - HOW DO WE REACH THOSE THAT WE CAN NEVER REACH - PHONE # IS GOOD**

- Call them when you are prospecting Active Users. If they are still using the site at a later date that is a good indication they are a real buyer/seller.

- Export / Load the numbers into a dialing system daily and call through till you reach them if you have access to a dialer.

**MORTGAGE PARTNER TO HELP WITH CALLS**

- If you have an agreement with a lender

- Lender to follow a script and mention that an agent will be following up

- Lender marks the appropriate Urgency leaves notes in the record & emails the agent

**YOU REACHED THEM!**

- Follow the script

- Leave notes in the record

- Set up next contact date - even if moving in a year

- IF moving in less than 90 days - set an appointment to meet them!

- Mark TIME FRAMES

- Add PROPERTY DETAILS regarding what they are searching for

- Add secondary contact info - if applicable

- Log in as USER while on the phone with them and help the buyer with their searches

- Look for opportunities to setup more than one search for them. Provide a better more valid experience

- Send them a thank you email

- Send them a handwritten thank you note (if you have the time)

**INSTANT CHAT**

- Some have implemented instant chat on sites!

**SCHEDULING A FOLLOWUP FOR ALL WARM & HOT LEADS (How To)**

- 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

**WHO TO MEET WITH**

- Set at least 2 appointments per week - our standard is for every 20 you speak to - should make 1 appointment Only meet with buyers who are moving in less than 90 days - unless a relo is coming to town

- Only meet with buyers who are preapproved already!!
- If possible try to get a consultation appointment first. This is a great time to get a

buyer agency/loyalty agreement signed.

**MANAGING ACTIVE BUYERS WHO ARE ONLINE**

- Watch the activity of the buyers

- Search Activity today and sort start date by oldest to newest and call them and also send “Template: Active Lead Email Follow Up: email if you do not reach them.

- Call them when you see them online - especially if you have never reached them as of yet

**SEARCHES TO RUN DAILY - TIMEBLOCK 1 HOUR**

- Run a search daily for No Contact leads LAST ACTIVE IN LAST 1 DAY, 2 DAYS, ETC. - Call this list after exporting to dialer

- Review FAVORITES for your buyers - FOCUSING on WARM and HOT

- Manage your dashboard daily for your WARM and HOT leads

- If you have reached all the above - Run search for ACTIVE – No Communication within last 30 days and call them

- Call them using the dialer if possible

**CLEARING ACTIVITY DAILY**

- Imperative to always clear your daily activity from your dashboard

**MANAGING THE TEAM**

Accountability is critical

We utilize online tracking for leads contacted, appointments set and contracts written

**ULTIMATE GOALS and EXPECTATIONS**

- Reach all of your leads on the day they arrive - Goal is 3-5 minutes

- Reach 50% of your new leads LIVE as they arrive

- Contact at least 10 people per hour when doing lead follow-up

- Time block on your calendar for LEAD GENERATION AND LEAD FOLLOWUP (2 hours per day) Active Leads - Best times to reach are 4-7pm M-F / Sat am / Sun afternoon 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! Email never counts as a contact!!

- Always cut buyer's time frame in 1/2. If they say moving in a year, set a NEXT CONTACT date for 6 months The standard ROI for every 100 leads is a minimum of 3-4 closings. A 60-90 day start-up period is typical Team Members are expected to refer any loan pre-approval inquiries to Team Loan Officer