**REAL GEEKS BEST PRACTICES – Minimum Standards & Practices to Follow  
  
\*\* See** [**http://docs.realgeeks.com**](http://docs.realgeeks.com) **for Template Emails, Scripts, VM Messages**

**Important to CLEAR Follow Ups DAILY**

* Important to always clear your daily activity from your dashboard
* Manage your dashboard daily for your WARM and HOT leads

**#1. New LEAD ARRIVES - AGENT FOLLOWUP**

- Call within 5 minutes

- Leave VM Message \*See VMScript  
- ADD ACTIVITY Called or Left Voicemail

- If do not reach – Try through out the day if possible

- If do not reach – Schedule a Follow Up 2nd try for the next day

- If do not reach – Schedule a Follow Up 3rd try for the next day

- SEND EMAIL from Template Email that you tried to reach them – \*\*See Docs

\*\*Once you reach them, use a script (see Docs) - see below for YOU REACHED THEM

**YOU REACHED THEM!**

- Follow the script (make sure your script has seller questions)

- Leave notes in the record

- Schedule next follow up date

- 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

- Login as USER while on the phone with them and help the buyer if they need it

- 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)

- Make sure you ask if they need to sell a home!!! Leads area sellers too!!!

**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

**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

**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**

* If ALL are bad Mark them DEAD under STATUS & forget about them!!
* If you reach them & email is bad correct then login to turn updates back on if they want them ☺

**#2. Favorite Property Added Link in Daily Follow Up Reminder Email**

- Click on link Daily from Daily Follow Up Reminder Email!!

- OR Search “Last Favorited Property Date”, then filter by last communication date prior to so many days. You can add additional filters if you want. Call them and also send “Template Email: Favorite Property Added Lead Email Follow Up: if you do not reach them.

- It is IMPORTANT to call Type of users - especially if you have never reached them!

**#3. Prospecting ACTIVE USERS WHO ARE ONLINE**

- Very Important to pay attention to Active users!!

- Search Activity Today, then filter by last communication date prior to so many days. You can add additional filters if you want. Call them and also send “Template: Active Lead Email Follow Up: if you do not reach them.

- It is IMPORTANT to call ACTIVE users - especially if you have never reached them!

**MORTGAGE PARTNER Can HELP WITH CALLS**

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

- Lender marks Urgency, leaves notes in the record & emails the agent if Hot/Warm

**WHO TO MEET WITH**

- Meet with buyer/seller who are moving in 90 days or less - unless a relo buyer

- Try to 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.

**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 2 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! Email never counts as a contact!!

- Always cut buyers/sellers 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

**MANAGING A TEAM**

Accountability is critical

You should use some sort of tracking for leads contacted, appointments set and contracts written