**REAL GEEKS BEST PRACTICES – Jeff Manson advices to use  
  
\*\* See** [**http://docs.realgeeks.com**](http://docs.realgeeks.com) **for Template Emails, Scripts, VM Messages**

**Follow Up - CLEARING Follow Ups DAILY**

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

**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 ☺

**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