




LEAD MANAGEMENT TIPS / REMINDERS

-  Leads fall in two categories
 - Unconverted: No contact / communication has been made
 - Converted: You have connected with the person and moved them from a lead stage to a Hot / Warm / Cold
-  Starting with Unconverted Leads, work lists in numerical order
-  Make sure you have a system to log your text / email / calls so you can be consistent in the follow up! Find a CRM that you can use to your advantage and automate some communication in the background.

UNCONVERTED LEADS

Task	Description	Contact Frequency	Notes
List #1 Today's Leads	New leads from today.	Call ASAP! CRM still sending emails.	Ask for feedback on what they see right now to get them talking.
List #2 Leads / Daily	Leads that are 10 days or less that have not been contacted in 12 hours. Try them again!	Keep contacting new leads everyday to engage them.	Goal = Set The Appointment! "Hi, John! I saw a few homes caught your eye on Facebook. This is ___ w/ Next Home Champions. Anything stand out about the home you see online right now? Anything you thought was good / bad / ugly?" "Is there a certain house in particular you would like to see?"
List #3 Old Leads	Unconverted leads 10+ days old that have been recently active. People inquiring on our website this week.	Call ASAP!	"I was going through my files, and didn't see if you ever bought a home?"

CONVERTED LEADS

Task	Description	Contact Frequency	Notes
<p>List #4</p> <p>Active Converted Leads</p>	<p>Someone you have spoken with and converted.</p> <p>Stage has been changed to Hot / Warm / Cold and you should call them because they are active on your website.</p>	<p>Call ASAP!</p> <p>Text ASAP!</p>	<p>Check in to stay relevant w/out being annoying. How can you provide value and not just check in on search.</p> <p>“Hey John! It’s been a while. How are you?”</p> <p>“ I read an article and wanted to send over to you. Would you prefer email or text?”</p> <p>“While I’ve got you, how’s the search coming along?”</p>
<p>List #5</p> <p>Hot Leads (0-3 months)</p>	<p>Someone you have spoken with and converted. Looking to buy soon.</p>	<p>Call Every 7 days</p>	<p>Sort by most recent visit to see who to contact first. Also look at the number of properties viewed and saved to prioritize who to contact first.</p>
<p>List #6</p> <p>Warm Leads (3-6 months)</p>	<p>Someone you have spoken with and converted.</p> <p>Nice but not super ready.</p>	<p>Call Every 21 days</p>	
<p>List #7</p> <p>Cold Leads (6-9 months) Past Clients</p>	<p>Someone you have spoken with and converted.</p> <p>Have their info but not super motivated or the right timing.</p>	<p>Call Every 45 days</p>	
<p>List #8</p> <p>Sphere of Influence / Past Clients</p>	<p>Personal contacts and past clients that have closed a transaction.</p>	<p>Quarterly</p>	<p>Drive new business by finding a way to add value.</p>
<p>List #9</p> <p>Active Clients</p>	<p>Clients currently under contract you are working with.</p>	<p>As Needed</p>	