

MILLION DOLLAR
PIPELINE PROGRAM

MDPP Workshop: Developing a Bulletproof Follow-up



Jenn Tervo
Senior Trainer, Customer Success

market leader

The Plan for Today...



How to implement
Tracey's follow-up
process



Tools to keep
leads organized
and engaged



How to modify this
process for seller
leads



Today's call will be recorded

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Last Week's Featured Agent



Tracey Todd
Swift Creek Realty
Gainesville, Florida

market leader

When it comes to lead follow up, you need to

Have a Plan.



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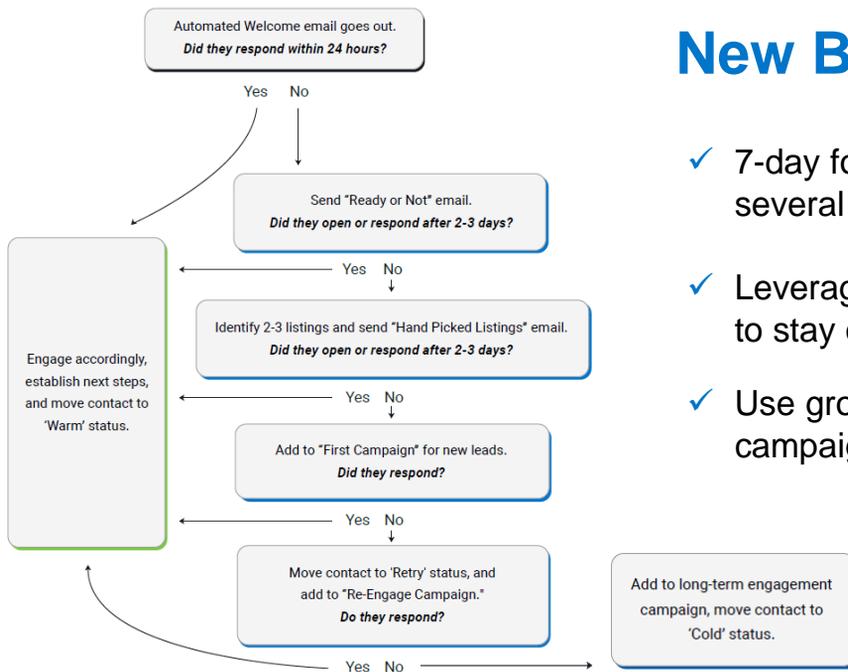


Tracey's Process: Buyer Leads

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New Buyer Leads

- ✓ 7-day follow-up, plus several weeks of campaigns
- ✓ Leverage your system tools to stay organized
- ✓ Use groups to add them to campaigns



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Status, Groups, and Campaigns



New Status

Buyer Group

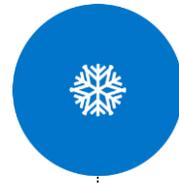
“First”
Campaign



Retry Status

Re-Engage Group

“Re-Engage”
Campaign



Cold Status

Cold Group

“Annual Leads”
Campaign

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Day 1

- ✓ New lead comes in
- ✓ Automated welcome email
- ✓ ICW email after 12 hours



Let them
look around

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Day 3

- ✓ Check their engagement
- ✓ Send “Ready or Not” email
- ✓ Review listing alert



If they don't have
an alert, set one up

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Subject: Ready or not completely ready, I'm here to help

They say, “Pictures are worth a thousand words!” until it has to do with the largest investment of your life. Real estate websites and pictures only tell half the story about that home. Going and seeing is always the best way to make a home decision but if you are not ready to start touring homes, I have a VIP buyer service you might really appreciate. Can you think of anything you need right now to help you along in the process or would you prefer to jump right in and start looking?

Feel free to give me a call at (904) 495-5612 or e-mail me at tracey@casonteam.com and I would love to discuss your plans for the future and see if there is more details that I can provide to help assist you in the process.

Please know I do not intend to pester you, but I do want you to know that I am here and ready to help you find your dream home. Please let me know if there is anything I can do.

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Day 6

- ✓ Check their engagement
- ✓ Send “hand-picked” listings
- ✓ Wait 24 hours



Send new *or*
viewed listings

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Subject: Hand Picked Listings

Thank you for taking some time and searching for homes on my website. I am always searching and looking at homes in the area and I hand picked a few that might be of interest to you that were not in your search:

- *Listing 1 (with personal/anecdotal context)*
- *Listing 2 (with personal/anecdotal context)*
- *Listing 3 (with personal/anecdotal context)*

*Please take a look and let me know what you think of the listings I sent.
Which do you prefer 1, 2 or 3?*

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Day 7

- ✓ Check their engagement
- ✓ Start custom campaigns



If they engage,
respond accordingly

market leader



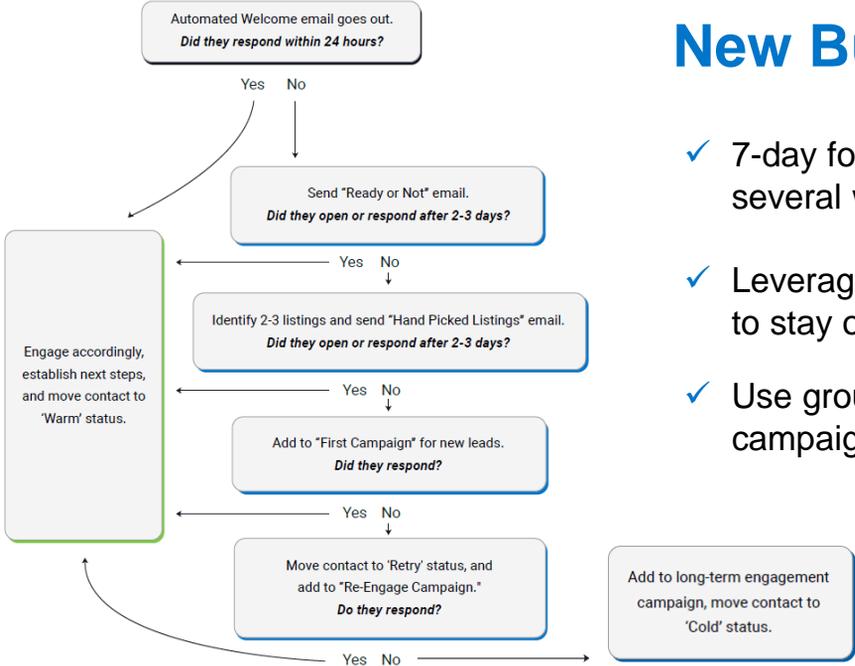
If They Respond

- Stop campaigns and **tailor your follow up**
- Move them to warm or cold depending on their response

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New Buyer Leads

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- ✓ Leverage your system tools to stay organized
- ✓ Use groups to add them to campaigns

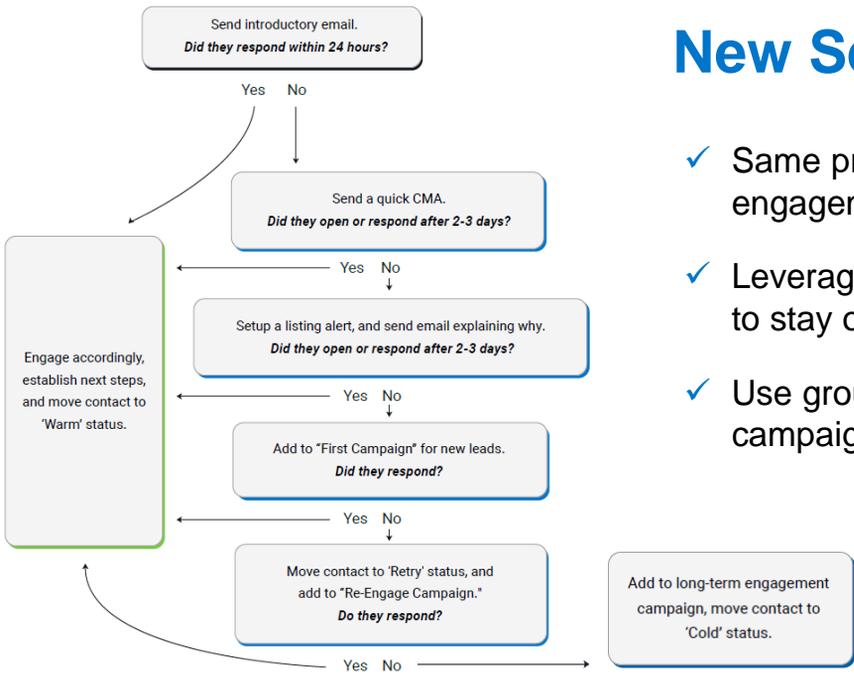


Tracey's Process: Seller Leads



New Seller Leads

- ✓ Same process, just different engagement content
- ✓ Leverage your system tools to stay organized
- ✓ Use groups to add them to campaigns



Status, Groups, and Campaigns



New Status



Retry Status



Cold Status

Seller Group

Re-Engage Group

Cold Group

"First" Campaign

"Re-Engage" Campaign

"Annual Leads" Campaign



Day 1 – Seller

- ✓ New lead comes in
- ✓ Send introductory email



Drive them to
your website

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Subject: [First Name]?

*Hi there, I just received your request (via [SOURCE]) about the home in {{Contact City}}.
How can I help? My name is _____ and I'm a realtor with _____.*

I'll be in touch shortly to provide the information you requested and answer any questions.

*P.S. I'm going to send you an email with a login and password to my website, so you can
browse up-to-date MLS listings, hassle free. Thank you!!*

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Day 3 – Seller

- ✓ Check their engagement
- ✓ Send a quick CMA



Email and direct
mail your CMA

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Day 6 – Seller

- ✓ Check their engagement
- ✓ Setup listing alert



Send an email
explaining why

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Subject: Hi [First Name]

I've set you up to receive listings in your area that are pending or have gone under contract. This will give you an idea of the activity of your market, and comparable home prices.

You should receive these property updates twice a week; if that's too much, or if you want to receive them more frequently, just let me know.

P.S. What did you think of the market value for your home? – A little high, too low?

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Day 7 – Seller

- ✓ Check their engagement
- ✓ Start custom campaigns

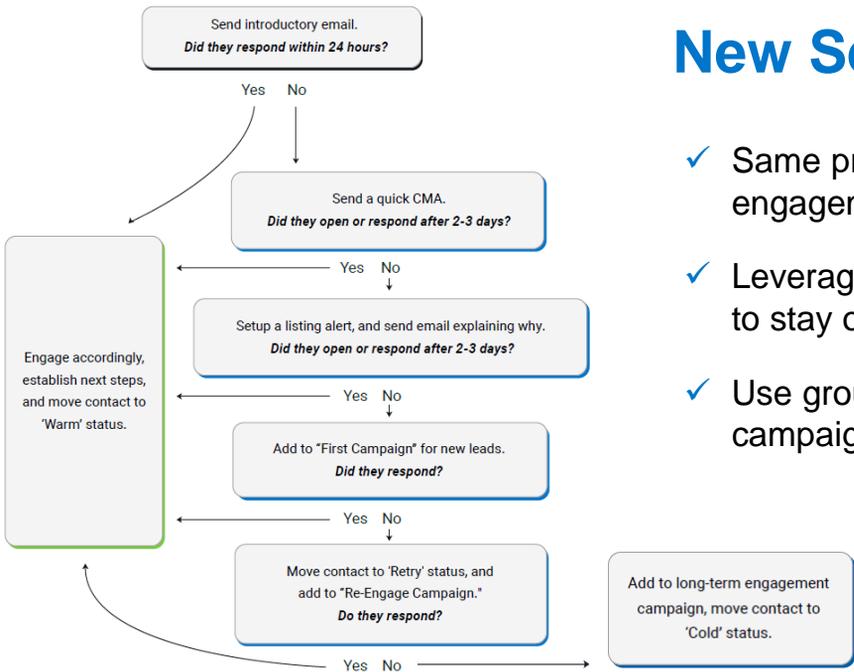


If they engage,
respond accordingly

market leader

New Seller Leads

- ✓ Same process, just different engagement content
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QUESTIONS?

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