

### MY DAILY ACTION STEPS

*\*Take Agent 101 to learn more!*

1. Respond to my new prospects  
*\*Review Call Center notes first*
2. Reply to new email from my prospects  
*\*File emails I answer by phone*
3. Reply to my new webmail
4. Take action on today's reminders
5. Check "Recent Activity" for newly engaged prospects

### GENERATE MORE PROSPECTS

*\*Take Agent 201 to learn more!*

1. Add your Agent MLS ID into Vision
2. Import your sphere
3. Post your listings to Craigslist through Vision  
*\*Repost regularly to get more prospects*
4. Put search widgets on your blogs and personal websites
5. Post links on your social media sites to specific pages on your Vision website (e.g., listing results for certain neighborhoods, sell a home page...)

### NEW PROSPECT ENGAGEMENT STRATEGY

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*Before a prospect responds, use this strategy:*

**Day 1:** Respond using the Initial Contact Wizard

**Day 3: If prospect is not on listing alerts:**

- Set up Listing Alerts
- Send email #1: Listing Alert companion email

**If prospect is on listing alerts:**

- Skip to email #2 (Day 6's activity)

**Day 6:** Send email #2 (e.g., Checking In)

**Day 9:** Send listings (e.g., Recommended Listings)

**Day 12:** Send email #3 (e.g., Below Market Homes)

**Day 15:** Send listings (e.g., MLS Search)

Change the prospect's status

Create my next reminder for follow-up

- Active: 2-4 weeks
- Hot: Weekly
- Inactive: 4-8 weeks

*After* a prospect responds, modify your approach. Change their status and create relevant reminders.

**Remember:** Reply fast to all of your prospects!

### STATUS

**New** → Prospects who just registered that you have not responded to yet

**Retry** → Prospects you're trying to engage

**Active** → Prospects who are "just looking" but are interactive

**Inactive** → Prospects who are not responsive or not interested

**Hot** → Prospects who are ready to buy/sell now

**Sold** → Prospects you have just closed

**Trash** → Prospects who wish to be unsubscribed

### MY NOTES:

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# Agent 101

## Steps to Success