

Agent - Web LEAD CONVERSION Checklist: Kristan Cole Team

At Any Point The Prospect May Engage and It May Become Appropriate to Discontinue Lead Conversion Checklist and Continue Working Them In the Market Leader System Through "Do Reminder - Set Reminder" as well as Add Them to Other Client Systems

Day 1	Day 1-10 are geared to solicit a response, WHEN a prospect responds - modify approach appropriately
Call	RESPOND IMMEDIATELY, CALL!! (if phone number provided)
Text	If No Answer, Text Message "Thanks for registering, do you prefer traditional, short sale or distressed property?" -agent name
To-Do	Input Lead to Market Leader Follow Up System (If Not Generated by System)
To-Do	Launch & Complete ICW (Send "scrubbed" List Of Properties In Area That You Feel Meet Their Criteria)
Email 1	Intro Email, Thank You For Taking My Call
To-Do	Change Contact Status From "NEW/LEAD"
To-Do	Reverse Look-Up Contact Information (pipl.com, jigsaw.com, Google, Facebook, Twitter, etc.)
To-Do	Write Hand Written Note and Include 2x Business Card (Thank Lead for Taking Your Call - if appropriate)
DRSR	Schedule 1st Reminder
Day 2	
DRSR	Do Reminder - Set Reminder
To-Do	"Friend" & "Follow"
Email 2	Did You Receive? Correct Information?
Day 3	
DRSR	Do Reminder - Set Reminder
Email 3	Listing Alerts
To-Do	See If Listing Alerts Have Been Set Up (If Not Set Up Applicable Alerts) - AUDIT LISTING ALERT
Call	1st Follow Up Call, Discuss Listing Alerts, Ask If They Received Suggested Property Emails, Leave Message
Day 4-7	
DRSR	Do Reminder - Set Reminder
Email 4	Foreclosure - Response: 1. MLS Foreclosure List 2. Most Recent Foreclosure List 3. Email Scott to Add to Foreclosure REO Drip
Email 5	Specific Property
Email 6	Best Buy List
Email 7	Investment or Personal
Day 8	
DRSR	Do Reminder - Set Reminder
Call	2nd Follow Up Call Pick A Call To Action and Discuss, Is The Property Information Relevant, Leave Message
Email 8	Home Buyer Guide
Day 9	
DRSR	Do Reminder - Set Reminder
To-Do	Research Prospects Search History To Ensure You/ The System Is Still Providing Relevant Information.
Email 9	Great Time To Buy - PERSONALIZED VIDEO LINK
Day 10	
DRSR	Do Reminder - Set Reminder
Call	3rd Follow Up Call ""Sorry, I have not been able to reach you yet..."
Email 10	Final Attempts
Day 11	
DRSR	Do Reminder - Set Reminder
Email 11	Close Out
To-Do	Assign Appropriate STATUS - DO NOT TRASH LEAD UNLESS THEY ARE TRULY "TRASH": Use "INACTIVE"
Assign	If they have Property Alerts Set up - "12 Direct Marketing Group"
Assign	If they do not have Property Alerts Set Up - "33 Touch Marketing Group"