

# The Associate Playbook



**Your Play-by-Play Guide  
for Lead Generation and  
Management Strategy Success**

Published by

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[www.marketleader.com/kw](http://www.marketleader.com/kw)

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## What Is The Playbook?

This playbook is many things. It's a case study in best practices. It is a road map for successful lead generation and conversion. It's a step-by-step guide to the world of Market Leader Pro, and a compendium of tips and strategies for real estate success.

Keller Williams real estate associates are some of the best trained, driven, and successful in the United States. Our goal in this playbook is to help you, Keller Williams professionals, to generate more leads, convert them quickly, and ultimately close more deals.

Learn from some of your most accomplished colleagues as you travel through this playbook, and emerge with the training and skills you need to further your success with the help of Market Leader.

Keller Williams associates have had considerable achievements teaming with Market Leader. Here is a snapshot of the success generated in such a short time with Pro and RealtyGenerator:

- More than 700,784 prospective buyers and sellers generated and being managed
- On average more than 89 prospects per associate
- More than 11,117,621 listings viewed on Keller Williams websites
- 28,674 closed deals on \$342,786,865 worth of real estate
- Approximately \$20,567,211 in Gross Commission Income

Of the 700,784 prospects being managed by Keller Williams associates thus far:

- 156,250 (22%) were from paid sources
- The remaining 78% of prospects were generated at no cost!
- 54,567 are from Craigslist
- 673,343 (96%) are actively engaged with their agents
- 27,441 are “hot” prospects with near-term close opportunities

And how active are those leads?

- They’ve saved more than 296,886 properties in the myHomes section of their Market Leader website

What exactly are these Keller Williams associates doing to increase their income and success?

The following pages will give you a glimpse at some of their best practices.

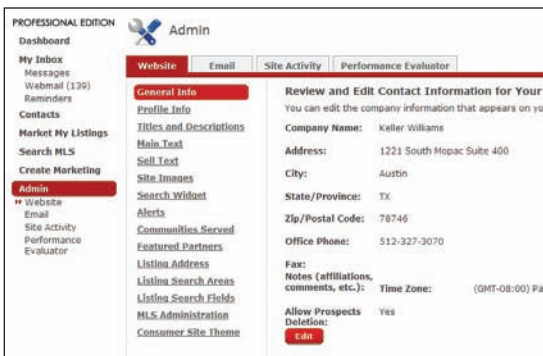
# Getting Started with Pro

## Getting started with Market Leader Pro

Market Leader Pro has many great features to explore, learn, and understand. Each one of these tools is designed with one goal in mind: to help you, the Keller Williams agent, capture leads that come to your site and give you the tools to convert these leads into actively engaged clients in a timely, strategic manner.

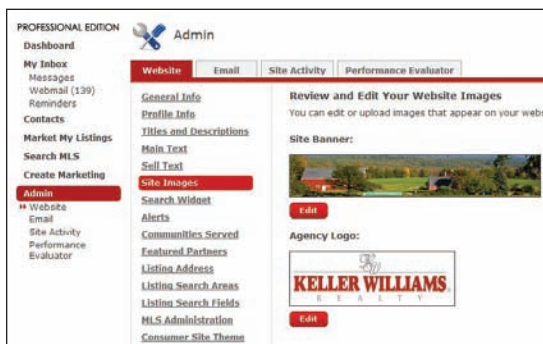
Market Leader offers training opportunities and support for its many tools, but first things first—let's get your website up and running. Here are a few must-do tasks to start on:

- Enter your contact and profile information.



The screenshot shows the 'Admin' dashboard with the 'Website' tab selected. The 'General Info' section is highlighted, and the 'Review and Edit Contact Information for You' form is visible. The form includes fields for Company Name, Address, City, State/Province, Zip/Postal Code, Office Phone, Fax, Notes, Time Zone, and Allow Prospects Deletion. An 'Edit' button is located at the bottom of the form.

- Add a banner image, logo, and photos to your site.



The screenshot shows the 'Admin' dashboard with the 'Website' tab selected. The 'Site Images' section is highlighted, and the 'Review and Edit Your Website Images' form is visible. The form includes fields for Site Banner and Agency Logo. An 'Edit' button is located at the bottom of the form.

- Set up your notification alerts—tell Pro how to alert you about new leads.

The screenshot shows the 'Admin' interface with the 'Website' tab selected. The 'Alerts' section is highlighted in the left sidebar. The main content area displays the 'Add Alert' form, which includes fields for 'Text Message Alerts' (Cell phone number and Cell phone carrier) and 'Email Alerts' (Email address). A red 'Add' button is visible at the bottom right of the form.

- Customize your neighborhoods served, listing search areas, and other search criteria.

The screenshot shows the 'Admin' interface with the 'Website' tab selected. The 'Alerts' section is highlighted in the left sidebar. The main content area displays the 'List the Areas You Cover' section, which includes a table of communities and their zip/postal codes. A red 'Add Community' button is visible below the table.

| Community     | Zip/Postal Codes |
|---------------|------------------|
| Austin        | 78731, 78757     |
| Austin proper | 78751            |
| Buda          | 78610            |
| Manchaca      | 78662            |

- Add your default email signature.

The screenshot shows the 'Admin' interface with the 'Email' tab selected. The 'Email Signature' section is highlighted in the left sidebar. The main content area displays the 'Edit Your Signature' form, which includes a text area for the signature and a red 'Save' button.

- Explore. Don't worry—you can't break it! Experiment with your site from a prospect's perspective. Create some test leads and try out the search capabilities.
- Learn more. Visit [www.marketleader.com/kw](http://www.marketleader.com/kw) for training materials, webinars, support, and other resources that will help you get the most out of your Market Leader Pro system.



**Next steps:** Download Market Leader Pro's quick start guide here: [www.marketleader.com/kw/site/wp-content/uploads/2011/04/gettingstarted\\_ml-professional1.pdf](http://www.marketleader.com/kw/site/wp-content/uploads/2011/04/gettingstarted_ml-professional1.pdf)

*"Who turned on the lead-generating fire hose? Market Leader did! Our business is running on overdrive and we are receiving more web traffic than we ever have before. It's nice to know that whether I'm working, playing, or sleeping, the lead traffic just keeps coming in by the truckload! Thank you, Market Leader, for making a huge difference in my business!"*



**Thomas Elrod**  
Keller Williams, Charlotte, NC

## Getting Lead Notifications Immediately

### **Fast forward your lead conversion with immediate lead notification**

Successful real estate agents gather leads from a variety of sources. However, what they do with those leads is crucial. Industry-wide, 67% of leads go unanswered. Agents are missing two out of three potential buyers because it can be time consuming and frustrating to keep track of leads across multiple systems.

Market Leader Pro streamlines the lead generation process and channels those leads through your Pro site, saving you time and money. That means that all leads that you find from KWLS listings, enhanced SEO, online advertising, Craigslist, personal websites, blogs and social media sites are automatically sent to your Pro dashboard.

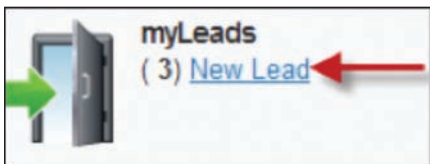
In order to turn these leads into clients, it is very important to respond to them quickly. Luckily, with eEdge and Pro, you don't need to wait until the next time you log in to know you have a new contact—both eEdge and Pro lets you know immediately, via text, email or both.

To make immediate lead notification work for you:

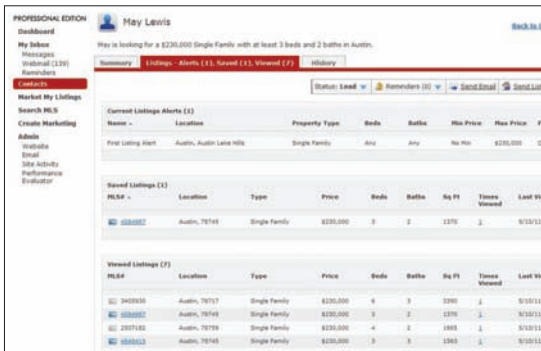
- First, when you set up your Pro website, follow the quick-start guide to set your preferences for receiving text and email notifications the moment a lead registers on your website.
- Each time a new lead registers on your website, he or she will automatically be added to myLeads. The system will also send him or her a welcome email,

keeping the lead warm until you're able to connect with them. Pro also uses this opportunity to make sure the new lead's email address is valid.

- Next, log in to your MyKW.KW.com and click on your "New Lead" link under the myLeads section.




- Once you have clicked on your lead's name, you will see his or her contact information and website activity, including a summary statement of the types of listings your new contact has viewed and links to specific individual listings viewed and saved.



| Current Listings Alerts (1) |                           |               |      |       |           |           |
|-----------------------------|---------------------------|---------------|------|-------|-----------|-----------|
| Name                        | Location                  | Property Type | Beds | Baths | Min Price | Max Price |
| First Listing Alert         | Austin, Austin Lake Hills | Single Family | Any  | Any   | No Min    | \$230,000 |

| Saved Listings (1) |               |               |           |      |       |       |              |             |
|--------------------|---------------|---------------|-----------|------|-------|-------|--------------|-------------|
| MLS#               | Location      | Type          | Price     | Beds | Baths | Sq Ft | Times Viewed | Last Viewed |
| 4580882            | Austin, 78748 | Single Family | \$230,000 | 3    | 2     | 1370  | 1            | 5/18/11     |

| Viewed Listings (7) |               |               |           |      |       |       |              |             |
|---------------------|---------------|---------------|-----------|------|-------|-------|--------------|-------------|
| MLS#                | Location      | Type          | Price     | Beds | Baths | Sq Ft | Times Viewed | Last Viewed |
| 3408838             | Austin, 78717 | Single Family | \$230,000 | 6    | 3     | 3260  | 1            | 5/18/11     |
| 4580882             | Austin, 78748 | Single Family | \$230,000 | 3    | 2     | 1370  | 1            | 5/18/11     |
| 2837182             | Austin, 78739 | Single Family | \$130,000 | 4    | 2     | 1885  | 1            | 5/18/11     |
| 4580813             | Austin, 78745 | Single Family | \$230,000 | 3    | 3     | 1565  | 1            | 5/18/11     |

 **Next steps:** Our online video tutorial, "Success Strategies for Associates" at [www.marketleader.com/kw](http://www.marketleader.com/kw), will walk you through this process and offer other tips for success.

Also, visit [www.marketleader.com/kw/professional-edition/pro-power-hour](http://www.marketleader.com/kw/professional-edition/pro-power-hour) to view Power Hour webinars, designed to teach you the latest Pro tips and tricks.

## Reaching Out to a New Lead

### *I have a new lead. What are best practices for building a relationship?*

Time is of the essence when you have acquired a new lead. From the moment you receive Market Leader Pro's alert, the clock is ticking. Consider the day you receive a new lead 'day one' of converting them into a valued client.

Best practices for lead conversion:

- **Provide outstanding value.** What does that mean? Be responsive, demonstrate attention to detail, be professional and knowledgeable, and give them your undivided attention. Think of times when you have received outstanding value. What made it special?
- **Make a difference.** Ask yourself what impact you want to make with this potential client. How committed are you to making a difference in this relationship?
- **Improve people's lives.** Give people the information and tools they need to meet their goals.
- **Customize.** Today's consumers are used to getting customized, tailored information. Provide information that is particularly relevant to them and their needs. Clue into their communication style and tailor your approach however necessary. Make an effort to be accessible in whichever medium your contact prefers—telephone, email, text message, Facebook, LinkedIn, etc.
- **Be easy to work with.** Be concise, both on the phone and via email. Be positive. Take a moment to put yourself in a good

mood before contacting a lead. Being easy to work with also includes being fast. Respond quickly and effectively, especially when action items are involved. Strive to contact a new lead within five minutes. They will likely still be online, and you will be front of mind. You'll give an immediate impression of competence and accessibility.

- **Follow a system.** Create an organizational system that works for you. Utilize eEdges's Initial Contact Wizard to leverage information that your new contact has provided, and reach out to them in the most effective, efficient way. Utilize eEdges's ready-made scripts, make your own email templates (or use Pro's free templates) and develop your own checklist for the first 10 days of lead follow-up.



**Next steps:** For a tutorial on how to use eEdges's Initial Contact Wizard and a discussion on best practices for converting leads to clients, visit [www.marketleader.com/kw/professional-edition/convert-more-leads-into-clients/](http://www.marketleader.com/kw/professional-edition/convert-more-leads-into-clients/).

For examples of effective email messaging and how to create a communication checklist, watch this edition of Pro Power Hour: [www.marketleader.com/kw/uncategorized/pro-power-hour-emails-that-lead-to-more-sales/](http://www.marketleader.com/kw/uncategorized/pro-power-hour-emails-that-lead-to-more-sales/)



*“Utilizing this platform has revolutionized and simplified the lead conversion process. It has made more effective use of my time by allowing me to focus on the people looking now, and allows me to continue to touch the people that are not yet ready to buy. With Market Leader Pro, there is a continuous cultivation of the relationship.”*

**J. Steven Roantes, REALTOR®**  
Keller Williams Realty Metro South  
Birmingham, AL

## Finding The Most Motivated Leads

### Using Market Leader Pro to identify motivated leads

Keeping up with all of your contacts can be a time-consuming and overwhelming task. Whether you are dealing with new leads, existing leads, or inactive leads, each contact needs to be communicated with in a strategic, timely manner.

Pro offers easy solutions that help you keep track of leads in every stage of the conversion process, and identify which of your contacts are most motivated.

Log in to your Pro home page and under “myLeads,” click on “New Leads.” Once you arrive on the “New Leads” dashboard, click on “Recent Contacts Online.”

### Recent Contacts Online

|                                 |       |
|---------------------------------|-------|
| <a href="#">Shakil Richards</a> | 1 PM  |
| <a href="#">Shannon Ryan</a>    | 10 AM |
| <a href="#">Evan Munford</a>    | 08/20 |
| <a href="#">Mandy Ungar</a>     | 08/18 |
| <a href="#">Patti Lowe</a>      | 08/17 |

This is your “Recent Activity Report.” This page will show you which of your contacts have recently searched for listings on your website. It will also alert you to inactive contacts who are re-engaging in the home buying process by revisiting your site.

When you click on a contact’s name, you’ll see all of the listings that they’ve viewed recently. Look through the listings to find themes and patterns.


- Are these homes similar?
- In the same neighborhood?
- In the same price range?
- Or maybe their price range has increased?
- What time of day are they looking?
- Are their searches consistent, or have they changed over time?

Use these observations to zero in on what type of home your contact is interested in.

Next, armed with this new information, use Pro’s tools to call or email them. Send them a few new listings that meet their interests, or set up a new listing alert.

Fully utilizing lead tracking with Market Leader's Recent Activity Report will ensure that you know:

- Who to contact and when
- How to best capture their attention
- How to be in the right place at the right time with your contacts
- How to demonstrate value and position yourself as an expert
- How to ultimately win more business

 **Next steps:** Visit [www.marketleader.com/kw/professional-edition/find-motivated-contacts/](http://www.marketleader.com/kw/professional-edition/find-motivated-contacts/) for a tutorial on using Market Leader's Recent Activity Report to find qualified leads.



*“As a new agent, I was with a small real estate company and I felt like I needed to revolutionize real estate sales. I couldn't figure out how to create a smooth process from start to finish in order to have a sustainable business. As soon as I made the switch to Keller Williams, it was obvious that I didn't need to do it on my own. Market Leader Pro has incorporated 'The Millionaire Real Estate Agent' seamlessly, allowing my career to take off! It was truly the answer I was looking for.”*

**Tyler Hagerla**  
Keller Williams, Carlsbad, CA

# Generating Business through Lead Nurturing

## Recapture past leads using nurture marketing

You've already learned how to set up instant notifications of new leads, and best practices for building a relationship with new contacts.

The lead conversion process doesn't end once you've captured a lead's contact information and started your 8x8 and 33 Touch campaigns. Nurturing and maintaining your leads over time is a crucial part of creating long-term business for yourself, and Market Leader Pro is here to help.

Your Pro account helps you build and maintain relationships with active leads, past clients, and other contacts, so that you are top-of-mind when they decide they're ready to buy, when a friend asks for a referral, or when a past client is ready to purchase a second home.

Pro provides easy, step-by-step ways to create a variety of marketing materials for you to use as you complete your 8x8 and 33 Touch goals with each one of your contacts. Some of the options include:


- ***This Month in Real Estate eNewsletters.*** Easily create a visually-appealing newsletter to email out to your contacts, or host on your website or blog (for topic ideas, visit [www.marketleader.com/kw/pdfs/eNewsletter\\_Pro\\_Brainstorm.pdf](http://www.marketleader.com/kw/pdfs/eNewsletter_Pro_Brainstorm.pdf)).
- **Custom email templates.** Your Pro account offers you unlimited email templates to use for any occasion in which

you might need to contact a lead—new foreclosures, listing alert changes, voicemail follow-ups, and more.

- **Express vignettes.** Create short, attractive videos that can be emailed out to leads, posted to social media sites, or embedded in your website or blog. Ideas for vignettes include client testimonials, introducing yourself to new leads, showing off a new listing, or any other message you'd like to convey in a visual way.
- **eCards/ePostcards.** Create stunning postcards in Pro's Design Center. Design a holiday greeting card, a Father's Day card, or a card promoting a hot new listing.

What's the best part? You can "set it and forget it." Create your campaign, target niche contacts within your database, set up future deployment dates, and Pro will automatically send your campaigns out so you can focus on running your business.

Pro's myMarketing area has all of the tools you need to create engaging, professional marketing campaigns to build your brand and reinforce the relationships you have with your best clients and leads.

 **Next steps:** For step-by-step instructions on creating custom campaigns, visit [www.marketleader.com/kw/CustomCampaigns.pdf](http://www.marketleader.com/kw/CustomCampaigns.pdf)

## Social Media: How Do I Tie It to My Pro Account?

### Using social media with my Pro account

Today's consumers are spending more and more time online. In fact, 90% of home buyers begin their home search online. It is increasingly important to market yourself in a variety of ways, both online and traditionally.

Leveraging the power of social media can help you find new contacts and also remind past clients or inactive leads of the value you bring to their home buying search.

Whether you are using Facebook, Twitter, LinkedIn, a blog, Craigslist, Flickr, or any other social media hubs, there are some tips you should follow to ensure maximum return on the time invested promoting yourself online:

- **Who is your target audience?** Consider whom you're trying to reach, and get inside their head. What kind of information are they looking for? What is important to them?
- **Pick your medium.** Consider where you will get the most response. Facebook? Twitter? Where do you have the most engaged followers?
- **Craft your message.** Make it informative and engaging—don't just self-promote. Create a dialogue with your followers by asking questions and offering compelling information that positions you as an expert. Create a multi-channel conversation.

- **Route followers to your Pro page.** This is the most important step for capturing leads. Always include a link back to your lead capture site. To generate more leads, make sure the link directs visitors to a page with immediate results that are relevant to the topic of your social media post.
- **Repeat.** Be consistent in your social media presence. You'll maintain followers by posting regular, timely information.

# Taking Craigslist To the Next Level

## Take Craigslist to the next level with Market Leader Pro

Most people are familiar with Craigslist, the free online classifieds website. In fact, it is one of the most-visited websites in the United States. Besides advertising garage sales and job openings, Craigslist can be a powerful lead generation tool for real estate agents.

By posting ads with information about recent listings, foreclosure properties, and desirable neighborhoods and including a link to your Market Leader Pro site, you can create a powerful, quick, and free lead generation system in your local market.

One of the many great features of Pro is its streamlined Craigslist posting system. Part of the portfolio of marketing tools available when you upgrade to a Pro account, the Craigslist poster helps you link your MLS listings to ads, automatically creates HTML code to include links and photos in your ad, helps you keep track of your current and past ads, and provides data on click-through rates and site visits generated by your ad.

|              |   |
|--------------|---|
| Price: \$    | <input type="text" value="109900"/>   |
| Post Title:  | <input type="text" value="Austin, TX - 3 Bed 3 Bath Home"/>   |
| Description: | <input type="text" value="Excellent opportunity in Grand Oaks! Neighbors only on one side, located in quiet culdesac. Wonderful lot, lots of privacy, Heavily treed lot, all appliances convey, irrigation system. Great neighborhood, close to everything. &lt;p&gt;&lt;a&gt;Full Details&lt;/a&gt;&lt;/p&gt;"/><br><input type="text" value="href='http://www.servinghpro2.com/listing/mlsId/13/propertyId/5538484/syndicated/1/cgltguid/2C139E47-"/> |
| Street:      | <input type="text" value="8513 Brock"/>   |
| City:        | <input type="text" value="Austin"/>   |
| State:       | <input type="text" value="TX"/>   |

When you use Pro to streamline your Craigslist postings, you're able to produce timely, effective, and good looking ads that will bring qualified leads back to your website.

In order to help you create effective Craigslist advertising, consider these dos and don'ts:

### **Do:**

- **Include headlines that grab the reader's attention:** Talk about desirable neighborhoods, great deals that are available, or convey a sense of urgency.
- **Keep it short.** Use brief, informative sentences with only the most important information.
- **Always link to a listings results page** that includes the specific home you are advertising and others that are similar.
- **Track your success** with the free website, Craigslist Ad Tracker (<http://craigslistadtracker.com/>).
- **Experiment** with Craigslist ad posting and find a strategy that works best for you and your leads.

### **Don't:**

- Include price, number of bedrooms and baths, and other specific information in your ad's headline. It limits the number of people who will open your ad.
- Use all capital letters or use the word "list" or "listings" in the headline. This will help you avoid flaggers tagging your ad.
- Wait until an ad has expired to repost. Expiration dates vary by market, but approximately 48 hours after your ad has gone live, you may delete your original ad and re-post a new one so that it appears closer to the top of the search results.



**Next steps:** For step-by-step instructions on how to use Market Leader Pro to assist in your Craigslist posting, visit [www.marketleader.com/kw/professional-edition/how-do-i-use-craigslist/](http://www.marketleader.com/kw/professional-edition/how-do-i-use-craigslist/).

For more tips and tricks for successful Craigslist lead generation, visit [www.marketleader.com/kw/professional-edition/harness-the-power-of-craigslist/](http://www.marketleader.com/kw/professional-edition/harness-the-power-of-craigslist/).

*"I signed up for Market Leader Pro at Family Reunion. When I saw that you could post ads to Craigslist and automate*



*the site with campaigns, I went back to my hotel room and started playing around with the site, and specifically the Craigslist poster. I got my first lead that night...my expectation became 'how many leads can I get?' 30 days in, I said, 'one new lead a day'. It changed my life. If you asked me today, my goal is 1,000 a month, or 25 a day. I don't think the system is even beginning to do what it's capable of."*

**Jerimiah Taylor**

Keller Williams Lead Agent, Tucson, AZ

## Using Your Website to Become the “Neighborhood Expert”

### **Become the “Neighborhood Expert” by adding value to your website**

An agent’s website is the workhorse of all the lead generation tools available. All your marketing efforts should be funneling interested prospects directly to your website. The goal being that they surf around and promptly convert into a lead. The “stickiness” of the website or the length of time a visitor surfs your site increases the lead conversion rate.

Your MLS listings are a big draw. People want to see homes. But, what happens after they checked out the house they were eyeballing? They may want to know more about:

- The neighborhood
- The local housing market condition
- Local schools
- Crime rates
- Area comparisons
- Weather risks
- Points of interest in the community

Leveraging the content above is how you can position yourself as the “Neighborhood Expert” to your prospects.

Market Leader’s newest product offering, Market Insider, is an extension to Pro that immediately provides valuable, local information on your website. Market Insider gives you the ability to reinforce your website as a one-stop-shop for all the local information a buyer needs when considering a real estate purchase.

Achieve the goals your website was created to accomplish: Draw leads in, have strong lead conversion and create value to cultivate repeat visitors.



**Next steps:** Learn more about Market Insider and how it can help you become the Neighborhood Expert. Visit [www.marketleader.com/kw/market-insider/](http://www.marketleader.com/kw/market-insider/) for more information.

## Market Leader Case Study: Eric Copper



Keller Williams' Eric Copper is a broker and one of the former Team Leaders of the flagship Austin Southwest Market Center in Texas. He specializes in Central, West and

Southwest Austin, and is a founding member of their Luxury Homes Division.

Market Leader sat down with Eric to ask him some questions about his best practices for associates to manage and convert leads using Market Leader Pro.

### ***What is your day-to-day practice for using Pro?***

I block my calendar every morning to lead generate. When I get into the office, I log in and go to my dashboard, which tells me if I have any new leads; if our call center has contacted those leads with an introductory call; and if I need to do anything to respond. I check to see if any of the follow-up reminders I have set for myself have come due and determine who I need to follow up that day.

### ***Once you've checked your dashboard, what's next?***

Before I pick up the phone to call leads, I'll look at any notes in the system from our call center team. I look at what types of property the contact has viewed online along with any other data points the system provides to craft my message. On my dashboard, I look for anything that can clue me in as to how to better approach the call. Then I pick up the phone.

### ***Where do you go from there?***

If they have provided a phone number, I want to call as quickly as possible. If I'm sending them an email, I have a couple of templates that I use, but I always personalize them when possible. I'll say something like, "I've noticed you are looking at this property." Instead of being generic, I always try to customize my response so that they'll know there's a real person who is listening behind the message.

### ***What are the tools you find most valuable in converting leads?***

The Keller Williams teachings and models are what I continue to build my business around. Market Leader is used to enhance my business. The basics of my business don't change—blocking out time every morning to lead generate. It's a very systematic process every day. Every day, without fail, time is spent using Market Leader's tools to generate and follow up with leads.

## Ben Kinney's "10 Days of Pain" Lead Conversion Method



### Lead Conversion Best Practices

Ben Kinney's "10 Days of Pain" Lead Conversion Method is a best practice for many Keller Williams associates, and is already

taught to thousands of agents nationwide. Ben is a Keller Williams Mega Agent and Operating Principal of multiple offices who teaches Keller Williams associates nationwide how to capture, cultivate and convert more prospects into closed business. He's also the co-author of *Soci@l*, a book about online marketing for real estate professionals available for free on the Keller Williams University website.

The "10 Days of Pain" Conversion Method is a high-touch, aggressive tool used to identify motivation levels and gather additional contact information so that leads can be appropriately classified and converted to appointments.

The National Association of Realtors research shows the average buyer searches for two weeks on their own prior to contacting a real estate agent. For this reason, Ben designed his internet lead conversion processes so that it can be completed in a ten day period.

Prior to contacting a real estate agent, potential buyers can be reluctant to release valid contact information. Although the ideal internet lead has email, mailing address, phone numbers, and valid search criteria, the majority of internet leads we will be working lack part to almost all of the above contact information.

Ben's internet lead conversion method is a combination of persistence and marketing offers that are designed to create motivation for the buyer to release more information. The conversion plan must be modified depending on what information you have available on the lead.

Methods of communication:

- Email
- Direct mail
- Video email
- Phone calls

Once you make contact you must adjust your messages and plan to fit the client's needs and timelines. Once you schedule the appointment, determine the buyer's timeline, or verify invalid contact information this system terminates. If you have valid contact information, but have not scheduled any appointments, transfer the lead to a long-term follow-up drip system.

An internet lead is defined as: Any person(s) who has expressed enough information to allow for a successful contact to be made. Lead conversion is about filling your pipeline with buyers that will be buying today or in two years. Always remember the goal of each daily communication is to set an appointment or at least capture another piece of needed information about the lead, such as a mailing address, a phone number, etc. You have many ways to contact each lead and will need to use a mix of these as you can gather contact information:

- Phone call
- Text messages

- Email messages
- Facebook message and postings
- Video emails
- Chat messages
- Direct mail
- Door knock

Until you have an appointment set to meet, an internet lead is just a lead and not an internet client. Remember these rules as you attempt to make contact:

For email messages:

- Be short and concise
- Always include a link to properties
- Always ask for the appointment

For phone calls:

- Always leave a voicemail
- Stand and smile when you are speaking on the phone
- Match your vocabulary, tone, and speaking speed to your audience

# Ten Days of Pain Conversion Plan

## Day 1

- Send introduction email
- Make introduction phone call
- Send follow up email thanking them for speaking with you if they answered
- Mail a note card with two business cards in it

## Day 2

- Send bank-owned email or list of properties that fit client criteria if you captured that with whatever source generated this lead
- Search for lead on Facebook and send a short message

## Day 3

- Send an email message that you are available this weekend
- Make follow up call and leave voicemail if no answer
- Send first video email (if video mentions that you are available it can be combined with Day 1)

## Day 4

- Send email with a free CMA offer or relocation package
- Attach a Just Listed Property list to email

## Day 5

- Send a “How am I Doing” email
- Attach a Recently Reduced Prices Property list to email

## **Day 6**

- Take one day off during the plan. This can be put any day between Day 3 and Day 9

## **Day 7**

- Send Special Services email
- Make another follow up phone call and leave a voicemail if nobody answers
- Send a text message if you are confident in the phone number you have

## **Day 8**

- Send Specific Property email
- Search other social media platforms like LinkedIn and Twitter and direct a message to them or send another Facebook message if possible
- Research their IDX activity

## **Day 9**

- Email “Long Shot CMA” message
- Make another follow up phone call and leave a voicemail if nobody answers
- Research their IDX activity

## **Day 10**

- Send Contest or Trivia email or video email
- Attempt contact once again via social media platform
- Research recent IDX activity
- Phone call for final call and leave a voicemail if nobody answers

## **Day 11+**

- Discard contact if not valid
- Place contact into drip program if you have valid information for long-term, continued follow up

## Scripts for Phone Calls

### Intro call

Hello (name),

This will only take a second, my name is (Your Name) with (Brokerage Firm) and I just wanted to thank you visiting my real estate website and wanted to see if you had any questions about buying real estate in (insert your city)?

- Remember to then ask ALL of the questions on your lead sheet
- ABC—"Always Be Closing"—attempt to set the appointment already

### Best Buy call

Hello (name),

Are you by chance interested in a really good deal? The reason I am asking is because I specialize in selling bank-owned, foreclosures and short sale properties. In fact I have a list of the five best-priced homes in (insert city) that I would love to show you. What is a good time for us to meet and go over these great deals? Would today be best or would tomorrow be better?

### Create Urgency call

Hello (name),

I just heard in the office about a great property that is coming on the market in the next week and I wanted to see if it fit your criteria before the rest of the general public and agents got to know about it. Please contact me as soon as possible so that I can give you more information about this amazing deal.

## **Last Chance call**

Hello (name),

This is (Your Name) with (Brokerage Firm) and I have been attempting to reach you for the past 10 days and I am not sure that you are getting my phone calls or emails. If you would still like to receive the just-listed, price-reduced and best buy properties in our area, please just call me or email me at (Your Email if it is simple) to start up again. I hope to hear from you soon!

## **Email templates**

Remember to have a signature file that includes:

- Name
- Phone
- Social network links
- Website

### **Intro email**

Hello (name),

This will only take a second, my name is (Your Name) with (Brokerage Firm) and I just wanted to thank you for visiting my real estate website ([www.YourWebsite.com](http://www.YourWebsite.com)) and wanted to see if you had any questions right off the bat?

Signature File

### **Open To Show email**

Hello (name),

Would you like to view some properties this week? What day and times work best for you? I am open this weekend and in the evenings during this week.

Signature File

## **Free CMA-Relocation Package email**

Hello (name),

I just realized that I am not sure if you are from (insert your city) or if you are relocating into our area? Which of these do you need at the moment?

Signature File

## **How Am I Doing email**

Hello (name),

I want to be sending you only the most relevant properties. Shall I adjust my search criteria for a better match to what you are looking for? I have an opening tomorrow night if you would like to view some homes.

Signature File

## **Specialty Services email**

Hello (name),

Many of my buyers feel that real estate websites only tell half the story about that home. If you are not ready to start touring homes, I have a VIP buyer service you might really appreciate. I can send you plat maps, tax information, videos, or additional photographs and sales history on any property that is for sale currently or has sold in the past. Can you think of anything you might need right now?

Signature File

## **Specific Property email**

Use IDX information to figure what type of property this lead was looking at and come up with a humorous subject line such as: Ugly Bank Owned Condo.

Hello (name),

I know of a bank owned condo that will be coming available soon. I think it will be under (insert price range for your area that is a great deal). Would you like to be the first to view this?

Signature File

### **Long Shot email**

Hello (name),

This is a long shot but often people use our website to try and gain an understanding of their own home value. Is this the case with you? If so, I would love to give you a free, online, no-hassle estimate or an in-depth broker price opinion. Interested?

Signature File

### **Free Certificate email**

Hello (name),

My office manager just gave me two free home inspection certificates that I can give out this week to buyers who would like to view homes on Saturday or Sunday with me. This is a great \$300-\$400 cost savings. Are you available this weekend?

Signature File

### **Contest email**

It's time for this month's trivia contest...

Remember: the first three people to answer these questions correctly will get a free appraisal certificate from Bank XYZ (insert your own giveaway item).

Where in (your city) can you go to see... (insert trivia question)?

All answers can be found by visiting [www.\(YourWebsite\).com](http://www.(YourWebsite).com)! Make sure to include your mailing address so the prizes can be delivered.

## Becoming A Pro: Resources You Can Use Today

The Associate Playbook was created using best practices from some of the most innovative and successful Keller Williams teams, matched with tactics on how to get started. This playbook will help you get your feet wet and it doesn't stop there.

The most successful teams and Market Centers are constantly changing, testing and innovating new ideas to keep their edge, generate even more prospects to fuel growth, and use more tools and technology to help them get more done, faster, in less time—all the while increasing their market share, revenue and success.

To continue to learn new ideas and best practices and become a Pro, try the following:

**Meet the top teams:** Introduce yourself to the top teams and Market Center rain-makers—in your market, region, or across the country. Learn what they're doing now, and share what's working for you.

**Read daily:** The internet is full of new ideas—via blogs, newsletters, community groups and more. Read marketing and sales publications as well to see what's working in other industries (that might be applied to home buyers and sellers as well).

**Brainstorm regularly:** Get your team together and brainstorm solutions to a difficult challenge. Chances are, your next innovative idea is just waiting to be discovered.

**Reach out to Market Leader:** We have specialists dedicated to Keller Williams. Visit us at [www.marketleader.com/kw](http://www.marketleader.com/kw) to learn more about Pro or call 1-866-224-9425 for help and support.





market **leader.** 



To learn more about The Associate  
Playbook or to request copies, please  
visit [www.marketleader.com/kwap](http://www.marketleader.com/kwap)

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