RRC ONE-DAY COURSE

Converting Leads Into Closings

RESIDENTIAL REAL ESTATE COUNCIL

RRC COURSE

CONVERTING LEADS INTO CLOSINGS

Presented by the

RESIDENTIAL REAL ESTATE COUNCIL

430 N. Michigan Avenue, Chicago, Illinois 60611-4092
www.crs.com

The Residential Real Estate Council is a not-for-profit affiliate of the
NATIONAL ASSOCIATION OF REALTORS®

REALTOR

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RRC COURSE:
Converting Leads into Closings

WELCOME!

Welcome to **Converting Leads into Closings**. This is a one-day course offered by the **Residential Real Estate Council.** Information on education, membership, and certification can be found:

- in the most recent **RRC Membership Guide**
- by calling a customer service representative at the **Residential Real Estate Council** at **1-800-462-8841**
- or by visiting our website at **http://www.crs.com**

Your instructors are experts in the field of residential real estate and speak from experience. The materials in this notebook complement their presentation.

Class will convene promptly each morning at 8:30 a.m. and conclude at 5:00 p.m. Coffee breaks are provided both morning and afternoon, and there will be an hour for lunch. Your prompt return will help to keep the course on schedule.

To earn CRS Designation credit, no more than forty-five minutes of the entire course may be missed. If you are absent from the course for more than this amount of time, you will not be able to take the exam or receive credit toward the CRS Designation.

Many states require attendance at the course for a specific amount of time to earn continuing education credit. Please check with the course host regarding your state's minimum requirement.

Successful completion of the course exam is required for CRS Designation credit and often for state continuing education credit.

Again, welcome to what we know will be a most challenging and profitable educational experience.

RECORDERS ARE NOT ALLOWED.

Table of Contents

Course Objectives

Upon successful completion of this course, you will be able to:

- Develop systems for capturing, converting, and tracking leads
- Implement customer-focused campaigns that provide consistent touches via various channels
- Integrate technical tools to enhance the efficiency and responsiveness of your lead management
- Set priorities for lead conversion and create an action plan for achieving them

RRC Membership Application

ALL MEMBER TYPES, DESIGNATED OR NOT, REQUIRE ANNUAL RENEWAL WITH MEMBERSHIP DUES

Name: ____

NRDS ID#: ____

REALTOR® Since: ____

Last 4 Digits of SS# (optional): _____________________________

Date of Birth: ____

Home Address: ____

City/State/Zip: ____

Office Name: ____

Office Address: ____

City/State/Zip: ____

Office Phone:____

Cell Phone: ____

Email Address: ____

Preferred Mailing Address: ☐ Home ☐ Office

Remember, you can apply online at ***crs.com/join***

Agreement of Applicant

In making this application, and in consideration of joining the Residential Real Estate Council, I understand and agree to the following:

1. I represent and certify that, to the best of my knowledge and belief, all the information contained in this application is true and accurate as of the date of this application, and I understand that if this information is not true and accurate, this may be a reason for termination of membership.

2. I understand that as a Candidate I cannot use the CRS Designation until it has been awarded to me upon completion of the Designation requirements, and I have been notified in writing. Such misuse will be cause for summary termination of membership. I also understand that once I am awarded the CRS Designation, I must maintain my membership in good standing in the Residential Real Estate Council, including the payment of annual dues, and meet any education maintenance requirement, to continue to hold and use the CRS Designation.

3. I irrevocably waive any claim or causal action of law or equity that I may have in the future against the Residential Real Estate Council, its Board of Directors, officers, committee members, employees or other persons cooperating with the Residential Real Estate Council either as a group or individuals, for any act or failure to act in conjunction with my membership or the business of the Residential Real Estate Council.

4. If admitted to membership in the Residential Real Estate Council, I agree to abide by the Bylaws and Regulations as they currently exist and as they may be amended in the future by the Council, as well as such policies and procedures as the Residential Real Estate Council may promulgate from time to time.

Signature: ________________________________ Date: ____________________

Billing Information

☐ Yes, I would like to join the Residential Real Estate Council. Enclosed is my check for $195. This dues payment is for twelve continuous months of membership.

Join online at ***crs.com/join*** or call ***800.462.8841***

RESIDENTIAL REAL ESTATE COUNCIL

Send completed form to:

Residential Real Estate Council

430 N. Michigan Ave, Chicago, IL 60611

or email: CRSHelp@crs.com

Questions: 800.462.8841 (toll free) • 312.321.4400

CRS Designation Application Process

Review the following requirements to determine which option best matches your experience. These requirements are for individuals who practice inside the United States, its insular possessions and the Commonwealth of Puerto Rico and Canada. All other individuals must complete the International Designation criteria.

Certified Residential Specialist
The Proven Path To Success

1. Submit your documentation satisfying all Designation requirements.
   - Council members who submit a Designation application with all required documentations will be awarded the CRS Designation within five business day from receipt.
   - If the documentation is incomplete, the notice will indicate the items necessary to complete the Designation application process.
   - Please note: the timelines are approximate. We will make every effort to process your application within the above stated timeframe except when there are extenuating circumstances.
2. Maintain ongoing active membership in the Residential Real Estate Council and active REALTOR® or REALTOR ASSOCIATE® membership with your local board and state association.

Production Requirements

You have the option of submitting your transactions by using either the Affidavit of Required Transactions OR Resume of Required Transactions.

Note: A residential transaction must be a single-family home, townhouse, cooperative, up to and including four-unit building, duplex, condominium or a permanently affixed mobile home unit. The transaction must have an improvement on the property. For example, water rights, transportable mobile homes, acreage and lots are not acceptable. You may only list transactions for which you completed no less than 50 percent of the work.

Affidavit of Required Transactions

You and your broker must complete the Affidavit of Required Transactions. The Affidavit states that you have completed the required number of residential transactions or volume. Simply indicate your name, the date, and the number of transactions that you have completed and sign the form. You will also need your broker to sign the form verifying that you have met these requirements. If you are the broker, please sign in both places.

For complete details, visit ***crs.com/designation***

Affidavit of Required Transactions

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Applicant's Name: ____

Date: _________________________

The undersigned Applicant herby certifies and swears that all information provided is true and factual. Should the Council find through confirmation or any other means that any statements made by Applicant are not factual; such statements will jeopardize Applicants' ability to be awarded or to retain the CRS Designation. The undersigned Applicant declares that the following information is true.

I am an Applicant for the CRS Designation and as a part of that application process I certify that

I have completed a minimum of _____________________________residential transactions* and/or ____ million in volume.

**Credit for completing a residential transaction is available only for the listing or sale of a single-family home, a townhouse, a duplex, a building of up to and including four units, a cooperative, a condominium or a permanently affixed mobile home unit that has closed. All residential properties must include an improvement. If Applicant is taking credit for any "co-listing" (a listing or sale that you shared with another sales associate, Applicant may take credit for a half of a transaction, provided that the Applicant completed no less than fifty (50%) percent of the work on that transaction.*

Signature of Applicant:

____

Certification of Applicant's Broker

I hereby certify that the above statement concerning the number of transactions in which the Applicant has worked is true and correct and accurately reflects the work done by the Applicant.

Name of Broker (Please Print): ____

Signature of Broker: ____

Date: ___________________

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Questions: 800.462.8841 (toll free) • 312.321.4400

CRS Designation Application

I understand that Council Membership requires annual renewal with membership dues. The application below is for individuals residing within the United States, its insular possessions, the Commonwealth of Puerto Rico, and Canada.

Instructions:

- Please double-check the documentation that you are submitting with this application.
- Attach all required documentation to the completed form.
- Include the $75 Designation Processing Fee and send it to the Residential Real Estate Council.

Name:____

NRDS ID#:____________________REALTOR® Since: ________________

Date of Birth: ________________Last 4 Digits of SS# (optional):_______

Home Address: ____________________________________

City/State/Zip:_____________________________________

Office Name: _____________________________________

Office Address: ____________________________________

City/State/Zip:_____________________________________

Cell Phone:_____________________Office Phone: _________________

Email Address:____________________Website Address: __________

Preferred Mailing Address: ☐ Home ☐ Office

Designation Program

I have completed and attached the required number of transactions for the following CRS Designation Program:

☐	**60/30/30 Program**	60 transactions OR $30 million in volume over the last three years AND 30 hours of RRC Education
☐	**Pro Program**	150 transactions OR an average of $1 million per year of experience with a minimum of 40 transactions AND 16 hours of RRC Education (must be licensed a minimum of 10 years to apply)

Send completed form to:

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Questions: 800.462.8841 (toll free) • 312.321.4400

Agreement of Applicant

1. I understand that I cannot use the CRS Designation until I have completed the Designation requirements and have been notified in writing that it has been awarded to me. Such misuse will be cause for summary termination of membership.
2. I understand that once I am awarded the CRS Designation, I must maintain my membership in good standing in the Residential Real Estate Council, including the payment of annual dues, and fulfillment of any maintenance requirement, to continue to hold and use the CRS Designation.
3. I am currently an active REALTOR® or REALTOR ASSOCIATE® and I understand that once I am awarded the CRS Designation, I must also maintain REALTOR® or REALTOR ASSOCIATE® membership with a local board and state association of REALTORS®.

Signature of Applicant: ______________________________________

Billing Information

☐ **Designation Fees**
$75 Designation Processing Fee

☐ **Membership Fees**
$195 Membership Dues (if not currently a member)

☐ Enclosed is my check payable to the Residential Real Estate Council.

Apply online at ***www.crs.com***

RRC EDUCATION CREDITS
I have completed the following RRC Courses:

(16 Credits required for Pro Program; 30 credits for 60/30/30 Program [Classroom, eLearning])

RRC Education: ______________________ Number of Credits: __________

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RRC Education: ______________________ Number of Credits: __________

Logistics

1. Times
2. Breaks and Lunch
3. Online Exam
4. Smoking
5. Use of Electronic Devices

Out of respect and to maximize the learning environment for all students, any student whose use of any form of electronic technology is identified as a disturbance may be asked to turn that technology to the off mode, or leave the room.

Any student whose disruption results in their removal from the class shall not be eligible for any refund from the course host or the Council.

Adult Learning

1. Purpose: Behavior Change
2. Why Are You Here?
    a. Student objectives
    b. Important issues
3. What Makes a Good Class?
4. What Makes a Bad Class?
5. Involvement
6. Role-playing allows us to see people behave in different situations—it's like a dress rehearsal. Role-playing is one of the most effective ways to learn. Whether actively participating or being an observer, role-playing provides us an opportunity to practice skills that have been taught and are required for our work. The operative words are taught and practice. The role-playing opportunity overcomes mistakes that can be costly: losing a sale, not getting a listing, offending a buyer. The role-play affords us time to make mistakes, receive feedback, correct mistakes, and move on to more successful behaviors.
7. Action Plan
8. You don't get paid for what you know; you get paid for what you DO. What are you going to DO with the information you learn in this course? This exercise will help you identify the actions you intend to take to apply what you have learned.

Notes

Converting Leads into Closings

RESIDENTIAL REAL ESTATE COUNCIL

CHAPTER 1

What is a Lead?

In This Chapter

Upon completion of this chapter, you will be able to:

- Define a lead in respect to your business profile
- Understand the lead lifecycle
- Recognize lead types and sources
- Calculate cost per lead and lead conversion

Chapter 1: What is a Lead?

Overview

Whether you are a new agent building your business or an established agent keeping your database fresh, maintaining a flow of potential customers is crucial to your success. Attracting leads is key, but if you don't have effective systems for converting them into closings, you are leaving money on the table.

Some agents get hung up on the difference between good and bad leads, but you should not be quick to judge or dismiss incoming leads. Instead, adopt a mindset of service versus quick sale, and follow up on every lead. Determine how to respond to various leads appropriately and nurture them to a closed transaction. Even if leads seem relatively cold, you can put them on an automated drip marketing system for a long-term care program.

This course will cover strategies for how to gain the most benefit from your leads. This chapter covers the definition of a lead, a lead's lifecycle, and lead types and sources. In later chapters, you will view real-life examples of how successful agents apply both traditional and digital approaches to identifying and closing more customers. Course activities are designed to help you apply concepts to your own action plan.

Definition of a Lead

Broadly defined, a lead is a potential customer who has shown interest in your services and provided contact information. Think of a lead as someone needing information and assistance that you can provide. If you have a single way to contact a person, then it counts as a valid lead. A lead sometimes is just an email address—no name, no phone number. After an agent makes initial contact (i.e., via phone, text, email, etc.), the lead is re-categorized to a "prospect."

When making contact, your goal is to convince clients to work with you. Building trust is the first step in overcoming possible skepticism. Market knowledge and a respectful approach should be the two core elements in your first exchange. Be specific to customers' needs and strive to exceed them. This process will enable you to convert the lead to a prospect to a client to a closed transaction and ultimately to a client for life.

Lead Lifecycle

From the moment a customer contacts you, you should put them in your communication flow. As your relationship with the client evolves, adapt the channels and messages you use to communicate with them.

The lead lifecycle begins with attraction and then moves to initial response, where you add their information to your database. A needs analysis is conducted to apply the correct marketing strategy and identify where the lead is in the purchase cycle. For leads planning to sell or purchase in the distant future, an incubation or nurturing strategy is implemented to keep you top of mind until they are ready to act.

Attraction: Educate and Connect, Rather Than Sell

Increasingly, successful lead generation involves inbound, rather than outbound, marketing. Unlike outbound marketing that pushes a message to potentially unqualified leads, inbound marketing focuses on being found by receptive leads who already are looking for services that you offer. The goal is to bring customers to you by providing helpful information. By creating value for customers, you can effectively position yourself as an expert, generate leads, and foster customer loyalty. Rather than selling yourself or your services, offer opportunities to educate and connect with clients.

When a lead does contact you, determine their purpose—are they just curious, looking to buy or sell soon, asking about the price of the house just listed down the block?

Initial Response: Be Quick

Someone has requested information via a website, phone call from seeing a yard sign, text, email, or other communication method. You can respond using a single communication method or build multiple communication methods into your approach. If the request comes from an online source like Zillow or Trulia, multiple agents may be simultaneously receiving the same request for information. The key is to respond instantly. Experts agree that if a contact attempt is not made within five minutes of the request, another agent likely has already made the “suspect” a “prospect.”

Immediately after initial contact, enter the lead’s information into your database to track all conversations and marketing approaches applied, as well as any other important details about your communication with them. If the lead is already in your database, update their information. (For more information, please see Chapter 2.)

Needs Analysis: Target Your Marketing and Communications

Starting with the initial contact, perform due diligence to determine what the client needs so that you can plan your consumer education and marketing approach. Your job is to give them what they want and build trust. Putting this time in upfront enables you to understand where the client is in the purchase cycle and focus your time, energy, and money.

Incubation (Nurturing): Be Persistent

Not all new leads that you generate will be ready for services. Incubating (also known as nurturing) is used for the leads who are not yet ready for your services. If a lead is early in the purchase cycle, you can determine an incubation and drip campaign approach. Nurturing helps move those “not ready yet” leads through the pipeline to the desired end result—the closed transaction.

Conversion

Conversion encompasses the entire process from lead capture to the closed transaction. The Internet has changed, and will continue to change, the way real estate agents generate, capture, and convert leads into clients. Improving your lead conversion rate is as essential to your business approach as generating and capturing the lead.

Closing and Beyond: Maintain the Relationship, Generate More Business

Once the transaction closes, you want to remain top of mind with the client. Although the client may not be buying or selling another property in the near future, they know people who will be. Later in this course, you will see examples of other agents who successfully maintain their relationships and consistently generate business from their databases.

Lead Types and Sources

Leads can come from a range of sources, and different agents can achieve success using different approaches based on their markets, personalities, and business profiles. Understanding different types and sources of leads and determining which mix works best for you is an essential part of your marketing strategy.

Lead Types

There are a variety of real estate lead types including:

1. Buyers (first time or repeat)
2. Sellers
3. For Sale by Owner (FSBO)
4. Expireds
5. Referrals
6. Repeat Business (buyers and sellers who have worked with you before)
7. General Public (people you would like to know but have not met yet)

Lead Sources

Leads come from a variety of sources including (but not limited to):

- **Sphere of Influence** (SOI)
  - Repeat customers
  - Referrals
- **Digital** (not an inclusive list)
  - Craigslist
  - Social media
  - Email
  - Personal business website
  - Company website
  - Stealth sites
  - Real estate sites (REALTOR.com, Trulia, Zillow, etc.)
  - Apps
  - Video
  - Pay-per-click (PPC) ads
  - Real estate lead companies

- **Traditional** (not an inclusive list)
  - Networking
  - Strategic alliances, affiliates
  - Community events
  - Community organizations
  - Client events
  - Cold calling
  - Calling your sphere
  - Direct mail (postcards, newsletters, calendars, letters, etc.)
  - Farming
  - Open houses
  - Seminars
  - Radio
  - Television
  - Newspapers and magazines
  - Billboards

Whatever the lead types and sources you focus on for your business, the following elements can contribute to successful lead conversion.

- A clean, well-organized database with effective labels and categories
- An effective pipeline of new leads so your database doesn't become stale
- Systems for tracking and managing leads so that you can respond quickly and appropriately
- Customer-focused campaigns that give clients what they want via consistent touches and multiple communication methods

Agent Example: Internet Lead Follow-up System

http://www.collinsgrouprealty.com
Greater Hilton Head, South Carolina

Collins Group Realty focuses about 60 percent of their marketing budget on their website. Because the site is well established, they have strong natural positioning in search results. They also work with a third party provider to manage a Google AdWords campaign.

When Chip Collins, Broker/Owner of Collins Group Realty, switched to the BoomTown CRM platform, an increased volume of leads made it challenging to be immediately responsive to requests. (Please see **Appendix A**: Chip Collins Site Powered by BoomTown.) To enhance responsiveness, he hired Anne Wingfield as a Client Care Manager to monitor leads and manage inside sales.

With Anne on board, Collins Group Realty now is able to implement a responsive, effective Internet lead strategy that includes multiple touches via multiple methods to qualify and convert leads. Their strategy includes tactics such as:

- Calling immediately to let the lead know a live person is available to help and set a concierge mentality
- Immediately putting all new lead information in their database (Top Producer) and updating existing records
- Qualifying leads and looking for triggers to move them on to the next level, including placing leads with a buyer specialist when they are ready

The key to their system is placing leads in ***a consistent, effective communication flow***.

- ***Initial Call:*** If the first call goes to voicemail, Anne calls back instead of leaving a message.
- ***Initial Drip:*** If she ends up leaving a message, Anne places the lead on an automated drip campaign.
    - Sets them up for daily automatic listing alerts
    - Sends five emails over 14 days

1. Checks in to make sure the lead is actually getting listing alerts and they are not going into spam
2. Touches base, letting them know that they are receiving every listing available
3. Asks if they will be visiting the area and offers to schedule showings for dates they will be in town
4. Checks in again
5. States, “We hope we haven’t dropped the ball, since we haven’t heard from you.”

- ***Another Drip:*** If there is no response after five emails, she switches the lead to the next drip campaign.
    - Marketing coordinator sends a monthly newsletter
    - Anne writes a monthly email about lifestyles in the Low Country area
    - Each lead gets three touch points per month plus continued daily listing alerts
- If the profile for a lead changes, the campaign is automatically paused (a native BoomTown feature)

Agent Example: Importance of Nurturing an Online Lead

NKYHOMES.COM
WE SELL HOMES LIKE YOURS

http://www.nkyhomes.com
Florence and Northern Kentucky

Mike Parker, CRS with Huff Realty in Northern Kentucky knows that most Internet shoppers are lurkers. Online buyers are usually 6–12 months out from purchase when they first start looking, and they spend an average of 9 months researching neighborhoods and properties before they are ready to act. The key to converting these leads is being persistent so that you are still in contact when they “raise their hands” and signal that they are ready to buy.

Even if a lead doesn’t respond right away, Mike doesn’t assume disinterest. He seeks to establish virtual relationships with clients so that he can stay top of mind and be their first choice when they are ready to act.

The key to establishing these relationships is providing free, no obligation information to consumers who register on your website or subscribe to your emails. (Please see **Appendix B**: Mike Parker Sample Newsletter.) This demonstrates your expertise and builds trust. Potential topics include:

- Recommending lenders to help buyers get preapproved and searching in the right price range
- Providing resources related to consumer credit repair
- Mapping out the buying process to set expectations
- Recommending other service providers such as lawyers, appraisers, or home inspectors
- Information about market conditions
- Information about local neighborhoods

Once clients reach out, Mike continues to nurture the relationship by making sure that they have a positive experience with their transaction. Clients working with Mike Parker's team have a single point of contact throughout the entire buying process. Only after signing a contract is the client handed off to a skilled administrative professional who handles the contract process. Mike had previously employed a Lead Manager who initially made contact with the client before the client was assigned to an agent. To streamline the customer experience, Mike updated his business model so that clients would work with a single person, rather than having to bond with multiple team members during the process.

You Could Be Wasting Money If You Don't Track Leads

If you are not properly tracking your business, you are blindly making decisions. How do you know where to spend your money and effort if you do not know what has been effective? You should be tracking where your leads are coming from, how much they cost, and how many close. **Using real data rather than guesses will allow you to make better educated decisions regarding your business. (Please see Chapter 3.)**

Even if you don't currently have automated tracking solutions, you still can gather effective data using a spreadsheet to enter the lead source and personal net for every transaction you close. Keeping a record of closings and revenue generated by each lead source will allow you to assess your profitability on a regular (monthly, quarterly, and annual) basis.

In your tracking and assessments, consider statistics such as:

- Number of leads per source
- Cost spent per source
- Number of closings you can attribute to that source

Cost Per Lead

One potential calculation to consider is your cost per lead. Sometimes assigning specific dollar amounts to particular kinds of lead generation can be difficult. For example, some activities can help your overall business strategy by raising brand awareness and building loyalty, but these actions may not immediately produce specific income dollars. However, you should try to have a sense of how much you are spending on leads.

Amount Spent ÷ Number of Leads Generated = Cost Per Lead

For example, if you spend $2,000 on a direct mail effort and receive 25 leads, your cost per lead is $80. If you spend $1,500 and receive 20 leads, your cost per lead is $75. The second promotion was more cost effective.

Knowing your cost per lead also can help you determine your profits. You should be sourcing all of your closed customers by asking them how they came to work with you. This will allow you to attribute this income to particular lead sources. If you know how many leads and closings a particular source brings in, you can determine if it is worth your while.

Conversion Rates

Conversion rates can help you determine how many leads you are actually converting. These rates are a simple percentage, a ratio of people who did something out of all the people who were presented with an option to do something.

You can calculate conversions related to opportunity, or having leads entering your pipeline (e.g., website visitors versus visitors who actually register). You also can calculate conversion related to closings (e.g., people who register on your website versus sellers who end up listing with you after registering). Both types of calculations can help you make decisions about the effectiveness of your marketing and conversion efforts.

Number of Registration s/Closings ÷ Number of Leads Generated × 100 = Conversion Rate Percentage

Keep in mind that a conversion rate alone doesn't give you the whole story. You also need to factor in costs, as discussed above. You also want to factor time into your assessment of lead sources. Some leads, especially Internet ones, take longer to nurture and convert.

Exercise 1.1
Calculate Cost Per Lead and Conversion Rate for at least two of your current lead sources to assess how satisfied you are with their performance.
Lead Source 1:
Cost Per Lead (Amount Spent / Number of Leads Generated):
Conversion Rate (Number of Registrations or Closings / Number of Leads Generated x 100):
Lead Source 2:
Cost Per Lead (Amount Spent / Number of Leads Generated):
Conversion Rate (Number of Registrations or Closings / Number of Leads Generated x 100):

- Do you have the data about your business necessary to calculate these numbers? How satisfied are you with your tracking system?
- How satisfied are you with source #1? Is it performing well? If not, should you cut it or modify it?
- How satisfied are you with source #2? Is it performing well? If not, should you cut it or modify it?

The remainder of this course will provide information to help you systematize your lead generation and conversion to enhance your profitability and conversion rates.

Notes

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Converting Leads into Closings

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CHAPTER 2

Working with Databases

In This Chapter

Upon completion of this chapter, you will be able to:

- Understand the value of a lead tracking database
- Recognize the types of database categories
- Understand the importance of updating, analyzing, and managing your database
- Prioritize leads in the database
- Attract more leads to expand the database

Chapter 2: Working with Databases

Overview

As discussed in Chapter 1, effective lead conversion involves consistent contact with leads that responds to their wants and needs. To accomplish this, you need effective systems for documenting and organizing customer information. In other words, you need a database of accurate, searchable contact records that allows you to target your communications and track your interactions. All of your customer data should be in one place so that you can streamline your processes and provide effective customer service.

Customer Relationship Management (CRM) is an overall strategy for collecting and documenting information about your customers. Effective relationship management can help you increase lead conversion and customer referrals and provide additional insight into your business performance.

While many agents use programs like Outlook or Gmail to manage their contacts, some agents use specialized contact management software to organize client data, capture web leads, automate instant responses and email drip campaigns, track interactions, and eliminate the need for double entry of data.

CRM software can be cloud-based, on-premises, or mobile.

- Cloud-based is typically subscription-based and housed off-site on servers managed by the software company. It may contain email marketing, MLS integration, web lead management, and social media integration components.
- On-premises usually requires purchasing a perpetual license up-front with no recurring subscription cost but might incur additional costs for upgrades, customization, and maintenance; this software is housed on the local computers or servers.
- With agents increasingly dependent on tablets and smartphones to stay productive while they're out of the office, some CRM software offers mobile access to database information.

These systems come preformatted to organize the information you gather about clients: names and numbers, family members, interests, income, price range, home and neighborhood preferences, etc. Most also allow the attachment of notes and correspondence to contact records so that you can document the history of your relationship each time you interact. Another major benefit of CRM software is the ability to capture website leads. Add a drip-marketing component, and you can keep your name in front of customers with little additional work.

Building a Database

Consistently tracking your leads will increase your conversion ratio. As soon as a lead comes in, you should add the contact to your database. If the customer already has a record, be sure to update it and adjust your communication plans for them as needed.

Tracking leads can be in any system you prefer, from an Excel spreadsheet to an automated customer relationship management system. Don’t get hung up on the database platform. What’s most important is that you find something that you will use consistently. When selecting a system, consider your budget, personality, and business strategy. Whatever setup you use, be certain to track key information related to your customers.

Customer Records

Create and enter fields that allow you to drill down and retrieve database information including (but not limited to):

- **First and Last Names**: If your database allows, enter first and last names as separate fields to allow pulling the first name for campaign letters and addressing envelopes for mailings.
- **Phone, Fax, and Email**: Include phone, fax, and email fields.
- Create fields that allow you to sort contacts by:
    - **Source** (you can use codes for easier entry but be consistent)
        - Personal contact
        - Call in
        - Website
        - Email
    - **Quality of Lead** (you can use number or letter codes to denote quality)
        - Hot (ready to buy)
        - Warm (interested in more information)
        - Cold (never been contacted before)

  - **Date lead added** and **date of last contact**
    - Allows retrieval of prospects not contacted within a determined timeframe
    - Identifies inactive leads
- **Special Dates**: Add date fields to help you remember and locate birthdays, anniversaries, and other special occasions
- **Hobbies or Interests:** Include notes about points of connection that you can use to maintain rapport

Exercise 2.1
Use the space below to list ideas for new fields to add to your customer records.
1.
2.
3.
4.
5.
6.
7.
8.
9.
10.

Database Categories

Using categories to sort contacts will help you better target your communication with clients. Most contact managers come with default categories, but you always should create customized categories based on your individual needs and relationships. If you consistently apply the categories that you create, your contacts will be much better organized and more searchable.

You can search your contacts using categories to target specific groups such as: high priority prospects; buyers in a certain price range; residents of a certain neighborhood;

or members of your “sphere of influence.” Be sure to label contacts carefully, assigning all relevant categories so that your searches can be accurate and effective.

The following is a list of sample database categories.

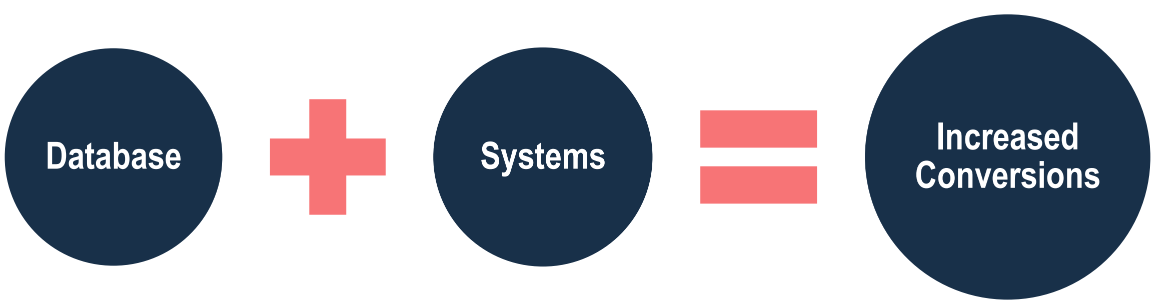
- **Sphere of Influence**
  - These are people you know who can generate business for you—who can give you a listing, referral, lead, or buy a house from you. You should be continually adding and deleting people to your SOI in the database.
- **First Time Buyers**
  - Target rental markets but not all in one complex as not all complexes are created equal
  - Conduct “How to Buy” seminars four times per year
  - Include a “First Time Homebuyers” button on your website
- **Neighborhood Farm**
  - Should have a minimum of 100 people, ideally 200, and have a turnover rate of at least 7 percent
  - Turnover calculation = divide number of houses sold in the past 12 months by the total number of houses in the farm
  - Contact 18 times per year by direct mail
- **Past Buyers and Sellers**
  - Contact them four times per year
  - Offer them yearly estimate of value on their home—BPO (Brokers Price Opinion) or CMA (Comparable Market Analysis)
- **Other Examples**

Friends, FSBO, Internet Buyer, Loan Officer, Expired Listing, Local Agent, Local Top Producer, Home Inspector, Open House Prospect, Appraiser, Listing Prospect, Investor, Builder, PTA, Church, Soccer, Family, etc.

Exercise 2.2
What are your top five to six database categories?
List ideas for new or improved categories to add to your database.
1.
2.
3.
4.
5.
6.
7.
8.
9.
10.

The Importance of Systems

To make effective use of categories in your database, you also need to develop checklists and plans for how you will follow up and communicate with leads. Systems allow you to arrange a consistent and effective series of contacts with a particular type of prospect.



To create a system, you need to divide a procedure into its individual activities. “Activities” include tasks, appointments, postcards, letters, email, phone calls, or any other item that you want to make a scheduled part of your plan.

You should create systems for all of your prospecting activities such as:

- Open House Follow-up
- Internet Follow-up
- Closing Follow-up
- For Sale by Owner
- Expired Listing
- Not Ready Yet
- Investor
- Direct Mail to Your Farm
- Social Media Posts
- Calling Your Sphere
- Pay-Per-Click Ads
- Customer Appreciation Events
- Responding to Sign Calls
- Any set of tasks that you or one of your team members completes on a regular basis to generate and convert leads

Analyzing and Maintaining Your Database

You want to ensure the database stays current and does not become stale. According to Mike Parker, CRS, using a customer relationship management system like Real Pro Platinum can save three to five hours of administrative tasks each week. Hiring an administrative assistant to update information and run metrics also can realize additional long-term time and cost savings.

Analyzing

If you invest in a customer relationship management system, learn how to maximize all components to perform desired analysis including:

- Manage drip campaigns
    - Assess what's working and place additional emphasis on it; re-strategize what is not working
    - Evaluate name recognition in your market
        - Use mail or phone surveys for traditional direct mail efforts
        - Code all direct mail materials with an unobtrusive letter or number
        - Using the coding established, determine response rates to various promotions and sources of clients. A good response to direct mail is usually 2–3 percent
        - Ask all callers how they heard about you with probing source questions near the end of your conversation, and thank people for their help in tracking your marketing efforts
        - Use online surveys to evaluate online marketing
- If you have a team, run metrics to review status for each buyer agent's leads to help make them accountable for client follow-up.
- Identify leads who require nurturing to persuade them to work with you

Maintaining

Tips for maintaining your database include:

- Enter new prospects as soon as you have their information
- Consolidate duplicate records
- Update customer information
- Check the relevance and consistency of your categories
- Back up your data on a regular basis
- Re-evaluate your marketing program two to three times per year; make adjustments based on the prospecting techniques yielding the best results

Attracting Leads and Expanding the Database

Attracting new leads to expand your database starts with devoting daily time to lead generation to achieve top of mind awareness. Examples include (but are not limited to):

- Calling the people in your database
- Sending personal notes
- Working your farm area
    - Become the farm area expert and communicate lifestyle or other non-real-estate information to them to keep you top of mind
    - Walk the area distributing “just listed” flyers or “just sold” flyers
    - When scheduling an open house, send invitations to residents on the targeted street

Providing quality content is an essential component of your lead generation strategy. It helps to build trust and demonstrate your expertise, which helps to create customer loyalty. If you post quality content on your blog or website, it also can improve SEO and help you attract more new customers organically.

For example, local market data is a good source of content for your website, blog, or email. Whether they are currently in the process of buying or selling, thinking about getting into the market, concerned about the potential value of their home, or just curious, most people are interested in what’s going on in their local market. (Please see **Appendix C1 and C2**: Mike Parker Sample Real Market Reports.)

Agent Example: Using Your Database as Your Sphere

SASHA FARMER TEAM
REAL ESTATE

www.charlottesville365.com

Charlottesville, Virginia

Sasha Farmer, CRS has found that she gets the best leads by building relationships. Though she has about 4,500 people on the mailing list for her monthly email newsletter, she maintains her database as a tight-knit sphere of about 400–500 people. Sasha prioritizes staying in touch with this core group. To maintain these relationships throughout the year, she:

- Holds various client events, making sure that everyone in her sphere gets invited to something
- Provides a gift of either pie or jam at Thanksgiving
- Provides a smaller gift offering on Valentine's day
- Calls twice per year
    - Each week, highlights a last name starting with a letter of the alphabet (52 weeks divided by 26 letters = calling each person twice a year)
        - Goal is to interact and not just have them hear her voice, so she sets a teaser if she doesn't get them when she calls
        - Checks in, offers help (e.g., handyman, contractor)

Sasha further segments her database by highlighting the top 50 people within her sphere. She does extra things for this special group such as getting them personalized gifts for their birthdays and holidays.

Each week she follows a schedule to make sure she is making time to stay in touch with her database. She uses a variety of methods to touch her clients, including email, phone calls, and face-to-face time in person over coffee or lunch. (Please see **Appendix D:** Sasha Farmer "Ideal Week.")

Exercise 2.3	
Where do you currently maintain your customer contact information? How satisfied are you with this method?	
How regularly do you update your contact records and track communications with clients and leads?	
How regularly do you perform maintenance on your database? Is it clean and current?	
What are the strengths of your current customer relationship management program?	
What are some areas for improvement in your current customer relationship management program?	
Based on these strengths and areas for improvement, what are your top concerns about database management?	
What are some specific steps you can take immediately to enhance your database?	

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Converting Leads into Closings

CHAPTER 3

Lead Tracking and Nurturing

In This Chapter

Upon completion of this chapter, you will be able to:

- Apply a successful automated and manual lead inquiry first response
- Understand the importance of drip campaigns for nurturing leads
- Incorporate strategies from successful agents into your own business strategy
- Consider the potential of hiring help to boost your conversions

Chapter 3: Lead Tracking and Nurturing

Overview

Successfully taking a lead through the entire lifecycle from attraction through closing and beyond requires systems that effectively track customers within your communication flow. When developing a lead conversion approach, consider your talents and personality type along with customers' psychology. Customers want to know that they can trust you and that your expertise can add value to their real estate experiences.

The next two chapters will offer more details about converting specific types of lead sources. This chapter will provide a bigger picture view of strategies for lead conversion.

Attracting leads is only the first step in the process. To successfully convert, you must determine where a lead is in the buying or selling process. Analyzing your leads allows you to better service customers and use your time and resources most effectively. You should not only identify the initial status of the lead but also track it through the process to make sure that you continue to communicate effectively. If a lead slips through the cracks because you don't follow up, you are leaving money on the table.

Tracking leads through the conversion process also helps you make informed decisions about your business. Determining the cost per lead, average time to close, and your conversion ratios assists you in allocating marketing campaigns and budget dollars where they will be most effective. (Please see Chapter 1.)

Agents use a variety of systems to track and analyze their leads. Whatever process you use, make sure that it is organized, structured, and consumer-focused.

Inquiry First Response: Automated Strategy for an Internet Lead

Use a good auto responder that is generated immediately when people email you or register on your site. Do not use the traditional long, canned email that is all about you and screams, "I am an annoying sales person." Present yourself as a real person who is available to help them when they are ready to buy or sell. Set expectations and let them know that you will be staying in touch to provide information to help them with whatever real estate needs they have inquired about.

Inquiry First Response: Manual Strategy

When a consumer requests information, respond as quickly as possible. For an Internet lead, the response ideally should be within five minutes or less. Any time over that and another agent likely has already made contact.

Remember, the goal is to give the consumer the information he or she is looking for and begin gaining the person's trust; this is not the time for a sales pitch. If you see that the person is still on your website, reaching out to him or her immediately delivers a "WOW" factor. A potential introduction for the call could be: "Hi, [Customer Name]. I noticed you are on my site right now, and I wanted to introduce myself. It is nice to meet you. My name is [Your Name]. I am available to help you . . ."

Once you have an Internet lead in your database, communicate with them in a variety of formats (phone, email, text, Facebook, etc.) until the client responds. Provide helpful and relevant information based on their requested criteria. Remember to remove a customer from preliminary generic campaigns once they engage with you and begin to service them based on their particular situation.

If an inquiry comes in via phone or as a walk in, you should have a system in place for customer intake that allows you to gather the information that you need to put them in the database. Be sure to ask a lead where they heard about you so you can better track your lead generation efforts.

You also should conduct a customer needs assessment and try to move the prospect closer to conversion. For example, if a buyer calls after seeing a yard sign, your intake process should persuade them to set an appointment. Rather than just providing information about an individual property, you should help them learn more about the buying process and solidify their desire to work with you.

Exercise 3.1

Rate the effectiveness of the components of your initial lead response. Circle the number that represents your level of effectiveness. A rating of 1 = “Needs Improvement.” A rating of 3 = “Satisfactory,” and a 5 = “Exceptional.”

Usage Category	**Rating Scale from 1 to 5** (*5 = highest*)				
Auto-responder email content	**1**	**2**	**3**	**4**	**5**
Responding within five minutes	**1**	**2**	**3**	**4**	**5**
Putting lead in your database	**1**	**2**	**3**	**4**	**5**
Intake for phone calls	**1**	**2**	**3**	**4**	**5**
Intake for walk-ins	**1**	**2**	**3**	**4**	**5**
Tracking lead sources	**1**	**2**	**3**	**4**	**5**
Converting to appointments	**1**	**2**	**3**	**4**	**5**
Setting expectations for follow-up	**1**	**2**	**3**	**4**	**5**

Based on your responses above, what components of your initial response to leads could use the most attention?

What specific steps could you take immediately to enhance these components?

Drip Campaigns

Drip campaigns are an extremely important part of the lead conversion process. If you set them up properly, drip campaigns can provide a hands off way to keep you in regular contact with customers. Once you put in the initial effort to set your goals, plan your schedule, and write your emails, the delivery of the messages can be automated to free up your time for other tasks. By keeping you top of mind with incubating leads and other people in your database, drip campaigns also reduce the number of customers who fall through the cracks.

These campaigns can be created in your customer relationship management system. (Please see **Appendix E**: Mike Parker Sample Drip Campaigns in Real Pro.) Using a CRM can help you automate the process and manage communications more efficiently. Even if you don't have a CRM, you still can create systems for sending targeted messages to particular kinds of leads at scheduled intervals.

Examples of drip campaigns include:

- Bank Owned
- Comparative Market Analysis (CMA)
- Email Home Search
- General Follow-up
- Listing Prospects
- Financing
- First Time Home Buyers (FTHB)
- Expireds
- Lead Follow-up

If you are using prewritten templates to create the messages for a campaign, be sure to check the content and modify it as needed. To be effective, a message must target your area, and some pre-written examples contain terms or concepts that won't resonate in your market. Carefully check the content of your message prior to sending.

To help build trust, incorporate information to educate the consumer about current market trends and other topics of interest. Providing great information helps build trust in your relationship. For example, you could share a market analysis that provides local data about your county, city, or particular neighborhoods.

Use the business statistics component of your customer relationship management system, email management system, or a site like Google Analytics to run reports to monitor the effectiveness of your drip campaigns. These reports will assist in pinpointing what day(s) and times people are most likely to open and click through your messages. According to LeadResponseManagement.org, Wednesdays and Thursdays are the best days to call to make contact with a web-generated lead. In fact, Thursday is a 49.7 percent better day to call than the worst day, Tuesday.

Agent Example: Tracking and Touches

SASHA FARMER TEAM
REAL ESTATE

www.charlottesville365.com

Charlottesville, Virginia

Tracking

Sasha Farmer, CRS is committed to tracking her leads to make sure that no one slips through the cracks. Although Sasha is tech savvy and uses Top Producer CRM to manage her contacts, she prefers to track leads in a numbered Excel spreadsheet containing 40 slots, which represent her goal of 40 leads each month. She has found that always carrying a hard copy of this form is the most effective way for her to remain consistent and effectively implement her system. (Please see Appendix F: Sasha Farmer Lead Tracker.)

LEAD TRACKER

Month: Year:

*	NAME	SOURCE (in detail)	RESULT OF CALL	PHONE#/ E-MAIL	# CALLS
	1				
	2				
	3				
	4				
	5				
	6				
	7				

Sasha's lead tracker spreadsheet contains the following columns:

- Name
- Phone
- Email
- Appointment (yes or no)
- Calls (tally number of calls)
- Sources (where lead came from)

  - Categorized for tracking; Sasha wants everyone to fall into 8–10 well defined categories
  - Sasha developed acronyms for different sources (e.g., DB for database, BP for business people)

Scanned copies of the paper forms that Sasha and her team members use are put into a binder so that the team can refer to them later to generate additional business. At the end of each month, Sasha tallies the leads. She also conducts quarterly and annual reviews to assess how many transactions are coming from each lead type and how much money is being spent. Based on her analysis, she adjusts her business strategy as needed.

During slower sales times of the year, Sasha and her team use this system for generating leads by reviewing the Appointment column and following up with “nos.” The form serves as a reminder to follow up with older leads that could result in a few more transactions per year.

Drip Campaigns

As discussed in Chapter 2, Sasha focuses most of her lead generation and conversion on personal touches with her Sphere of Influence. To stay top of mind, she also sets up clients on a series of automated touches based on closing date (when applicable) and layered campaigns for prospects.

She also sends a monthly mailer to her database that focuses on non-real estate content. This mailer takes the form of a letter that is designed to show different aspects of her personality. Past topics have included: her experience fostering dogs, reflections on a trip taken to another country, and what she is thankful for at Thanksgiving.

Sasha views this letter as an opportunity to build relationships with clients outside of just business. Each time she sends one out, she typically gets five or six responses from different people. Note that, even though this is a scheduled campaign, Sasha approaches it in such a way that it still reflects the core values of her business strategy. (Please see Appendix G1–G3: Sasha Farmer Sample Letters.)

To build relationships with local business people, Sasha also has a business list to which she sends a monthly mailer that highlights evidence of her business success. Her content features assistance that she has provided to clients—e.g., helping an elderly parent with estate issues or helping a client headed for foreclosure switch to a short sale. She communicates to recipients of the mailer that she is available to help if they know someone in a similar situation. If the relationship with a business person gets closer, someone can shift from her business list to being a member of her sphere.

Happy Hours

To deepen her connections, Sasha holds happy hours each month to connect with select business people. She pays for the first drink and appetizers and provides opportunities for attendees to network not only with her, but with each other.

She also holds a monthly happy hour with current/active clients, i.e., people who are actively searching or have closed within the past three months. People with completed transactions reinforce new clients' confidence in her, and people new to town get to meet other residents of the community. (Please see **Appendix H1 and H2**: Sasha Farmer Business Referral Happy Hour.)

Agent Example: Qualifying and Nurturing Internet Buyer Leads

NKYHOMES.COM
WE SELL HOMES LIKE YOURS

http://www.nkyhomes.com
Florence and Northern Kentucky

Mike Parker, CRS has collaborated with his team to develop systems for qualifying and tracking leads. Ray Straub, an agent who worked with Mike before relocating to Florida and joining Keller Williams Realty Boca Raton, understands the importance of following up effectively and demonstrating value to earn a client's business.

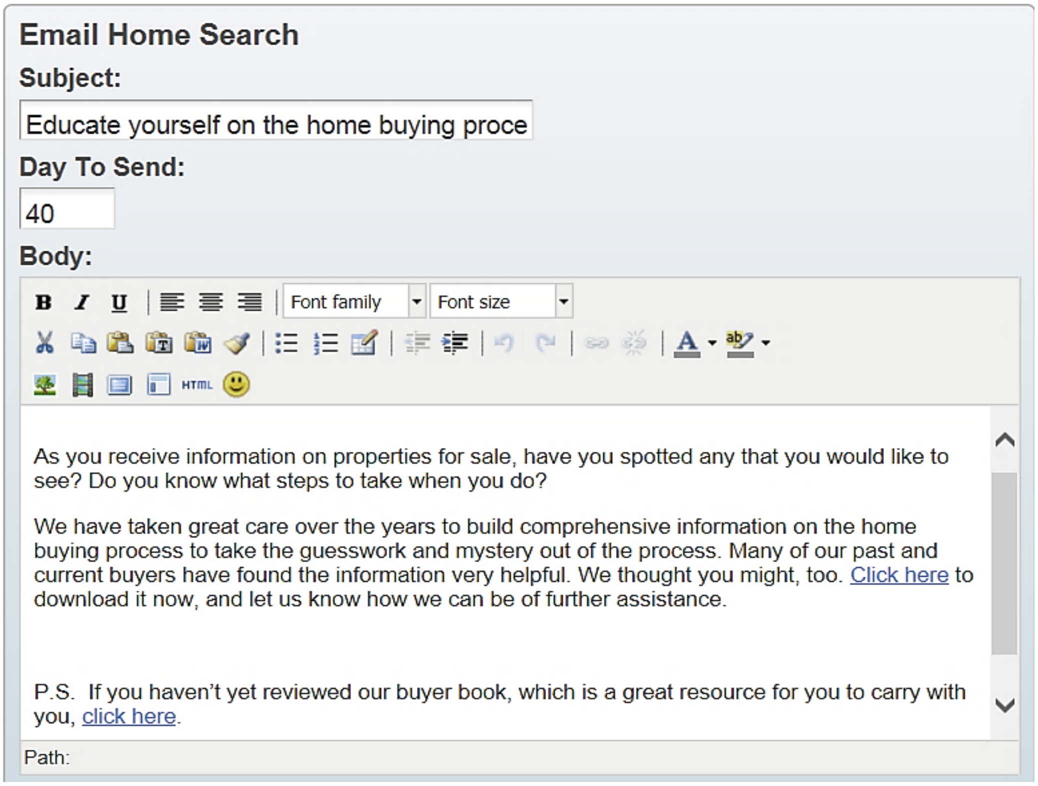
Time after time he hears from customers: "We worked with you because you are the only one who contacted us!"

Follow Up, Don't Give Up

To nurture buyer leads, Ray implements the following communication strategy. Note that Ray never flat out asks the customer to use him as their agent. Instead, he focuses on building trust until they reach out and are ready to act.

1. Ray attempts to make phone contact within five minutes, but also initiates drip campaigns that are appropriate to their requested criteria.

2. The first email includes as an attachment a buying guide that outlines the entire process and sets expectations.



1. The customer also is enrolled in auto-prospecting in the MLS based on their home search criteria.
    - On the same day that these alerts begin, the customer receives an email letting them know that they will begin receiving emails with new listings based on the information they provided. The message also lets them know how to store Ray's contact information so that his messages don't get sent to spam.
2. Ray attempts to contact the lead EVERY DAY for the first seven days via phone/text/email. He always updates the customer information in Real Pro to track interactions.
3. Another email provides contact information for local lenders, stating that the team works with great lenders who can explain the financing options currently available.
4. Twice per week, a blast email goes out with helpful information (area stats, weather alerts, interest rates, interesting industry-related articles, etc.). These emails can be targeted to specific groups of leads (e.g., bank-owned, first time home buyers) by using Real Pro.

Ray Straub - The Mike Parker Team

Visit us online at www.nkyhomes.com

,

I hope your week is off to a great start! I wanted to share this architecture guide I found with you. There are so many different style homes that it can be confusing when searching for the perfect fit. Depending on the area you live some may not be available. Here in Northern Kentucky there are a wide variety of homes to choose from depending on the neighborhood you are interested in. The following link gives an overview of all of the different types of residential architecture. My personal favorite is the International style. What style do you like the most?

Take a look at this link and tell me what you think.

Have a great night!!

http://realtormag.realtor.org/home-and-design/guide-residential-styles

Ray Straub - Realtor
Team Agent - The Mike Parker Team
HUFF Realty
859-250-2210

5. If the lead doesn't respond after the first week, Ray then tries to contact the lead once per week for the next 30 days. The customer continues to receive drips, blast emails, and MLS updates to ensure they are still seeinzg his name and picture and hearing his voicemails.

6. If he doesn't have the chance to speak with a lead and it becomes old, Ray still doesn't give up. He sends these leads emails twice a year saying, "I've been sending you information regularly about the local real estate market for a while now but have not yet had the opportunity to speak to you directly. If you are still considering buying or selling, please let me know." This allows Ray to update the database or adjust the drip campaign to better stay top of mind.

Tracking

As soon as a lead comes in, contact information gets entered into the Real Pro database so that Ray can communicate effectively with the customer and manage the drip campaigns. (Please see **Appendix I1 and I2**: Mike Parker Sample Real Pro Backend.) Ray also uses IDX through the company website to track how actively the lead is looking for properties. He can view when the lead is saving and rejecting listings, including those sent using auto-prospecting. This is a great way to qualify a lead actively looking online and analyze the types of properties they are searching for.

Additional Lead Nurturing Tips

- Use your database management system to make sure everyone is in the appropriate drip campaign. Auto prospect and stick with it!
- Contact people until they tell you to leave them alone. Do not delete a lead unless the person specifically asks to opt out.
- Apply time management techniques to nurture your leads. Blocking out an hour each day can be very profitable.
- Be consistent and have your system organized so you know exactly what you have to do each day.
- Whenever possible, try to talk with people on the phone. You can mirror the lead’s communication method in your initial response, but ultimately try to talk on the phone with them.
- During showings, ask your clients how they search to get more information about the customer’s perspective on the process.
- Video email is becoming more popular. Consider using it especially when targeting younger buyers and sellers. BombBomb is a popular provider for video email.
- Keep revising your strategies/techniques based on the results of your tracking. What works this month may not work next month.

Hiring Help to Boost Conversions

One thing you may notice about the successful agents who contributed to this course is that they all have other people working for their businesses. Even if you are a solo agent, paying someone part time to do administrative work can improve your customer service and increase conversions by enhancing the consistency and responsiveness of your communications. You also could outsource some of your marketing work to contractors to free up time for prospecting.

Consider your hourly rate. Would it be more cost effective to pay someone else to do certain tasks so that you can focus on more dollar productive activities? Once you have enough leads and revenue, hiring a buyer specialist could be another step in helping you convert more leads and grow your business. Potential tasks to delegate or outsource include:

- Maintaining your database
- Adding leads to drip campaigns
- Tracking leads
- Qualifying leads
- Creating and sending direct mailings
- Creating and sending electronic newsletters
- Conducting client intake
- Answering sign calls using scripts
- Administering your Facebook business page
- Managing pay-per-click (PPC) campaigns
- Managing transactions, coordinating closings

Agent Example: Hiring Help and Managing Leads

MORLEY REAL ESTATE GROUP

http://www.morleygroup.com

Huntsville, Alabama

John Morley, CRS hired his first part-time assistant just three or four months into the business, and a few months later, he increased the role to full-time. He made this investment in his business because he was planning for growth. He knew that freeing up his time would give him the opportunity to not only earn more as an agent but also build a business. After a year, John started adding buyer specialists for continued strategic growth.

Managing leads for a team requires an effective system for tracking and accountability. John knows that there is no point in having leads if you can't convert them. Previously, John had kept his lead management paper-based because he couldn't find a system that he liked. He used a green sheet for intake and tacked other pieces of paper onto it throughout the process to make sure that leads didn't fall through the cracks. He sorted leads into categories based on timing: A = buying in 30 days, B = buying in 30–90 days, and C = buying further out.

He now has switched to using the BoomTown IDX solution, which provides a front end website along with a back end CRM to provide clarity on tracking. BoomTown also provides other features such as management of PPC campaigns and options for drip campaigns.

John also is adding two inside sales people to his team. Their roles will be to follow up with people in the database who don't want to meet immediately. These team members will help to provide consistent touches until the buyer is ready to come in for a consultation. He also has brought on a listing partner to further grow his business.

Exercise 3.2	
How do you currently track the sources of your leads? How satisfied are you with this method?	
How regularly do you review your tracking data to assess how many leads are coming from each source? Is this often enough?	
What immediate steps could you take to enhance your lead tracking?	
What drip campaigns do you currently have set up?	
Considering your top database categories (Chapter 2), what updates could you make to these campaigns to better communicate with customer segments?	
Considering ideas for new database categories (Chapter 2), what new campaigns could you develop?	

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Converting Leads into Closings

CHAPTER 4

Digital Leads

In This Chapter

Upon completion of this chapter, you will be able to:

- Develop systems for short- and long-term follow-up with digital leads
- Understand the importance of a consumer-focused website
- Consider the effectiveness of your presence on other sites
- Consider strategies for connecting with consumers through social media

Chapter 4: Digital Leads

Overview

At some point in their buying or selling process, all customers are going to end up online. Huge amounts of information about properties, neighborhoods, home ownership, financing, and other real estate related topics are available 24/7, and today's empowered consumer does their own research at their own pace. Thus, to attract and convert online leads, you need to offer free, relevant content.

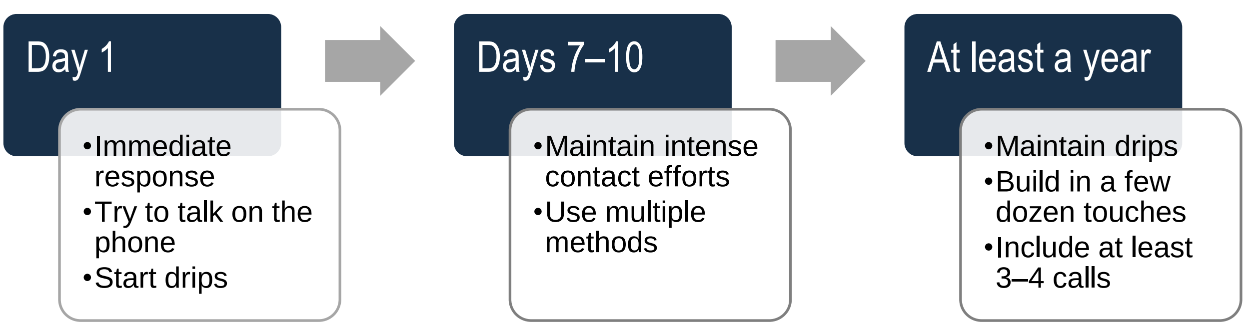
In short, you need to capture emails, develop relationships via regular communication, and offer tons of value long before asking for anything in return. As discussed in Chapter 1, this strategy is referred to as inbound marketing.

Generating leads through inbound marketing ultimately makes your job easier. Attracting customers by providing expert information establishes your credibility and trustworthiness at the very beginning of the communication process. What's more, better educated customers typically make more satisfied customers because they have clear, realistic expectations.

Whether or not you want or require a large-scale online presence depends on your market, comfort level, interest, and expertise. No matter how much emphasis you choose to put on Internet leads, you want to make sure that customers have a positive impression when they find you online.

Systematize Your Follow-up

As discussed in Chapter 3, you need a system for nurturing online leads so that you are consistently following up and remaining top of mind. Successful systems could include the following kinds of communication:



- When a lead comes in, respond immediately. If possible, try to get the person on the phone to offer customer service. If you don't reach them, try again later that day. Also put them on drip campaigns appropriate to their needs.

- If no contact is made the first day, maintain intense efforts to reach them for another 7–10 days. Use multiple methods—calling, texting, emailing, Facebook—whatever valid contact information you have.
- If you still don't get a response, continue to keep them on drip campaigns for at least a year. Build in a few dozen touches during that period. Don't limit yourself to email. Include at least three to four calls.
- **NOTE:** If dialogue occurs at any point, switch to more targeted follow-up based on an analysis of their needs.

When emailing, make your subject line "telling and compelling" and consider the perspective of the recipient.

- After receiving the information, will they be glad they took the time to read it?
- Will it provide information or interesting news they can use?
- Is it worth repeating to other people they know?
- Are they looking forward to your next note or email?

When calling, don't get too hung up on what to say. What's most important is that you are making yourself available and trying to connect. Offer assistance. Ask questions. Read the information that they have provided, and ask for more details about their needs and criteria. You also have the option of hiring someone to help with inside sales and make these calls for you. When you call Internet leads:

- Identify yourself. You are most likely not the only agent they have reached out to.
- Let them know you received their request. If they expressed interest in a particular property, provide the status, briefly describe the listing, and then listen.
- If the prospective client is amenable to remaining on the phone, gently begin asking qualifying questions: "When do you plan on moving?" or "Have you spoken with a lender?" and, of course, "Do you need to sell your current home first?"
- Sample introduction:
    - "Hi, Jane, this is [Your Name] with Best Real Estate Company. You requested information on a house, and I wanted to follow up with you to see how I can help. I see you're looking in the Happy Acres neighborhood, is that correct?"
- Sample close:
    - "I have an e-book about the home buying process. Can I email you a link to a complimentary copy?"

- “I have a market report about the neighborhood you’re interested in. Would you like a copy? I’m happy to email it to you.”
- If you don’t offer incentives, close your call with a request for permission to follow up. “Would you be interested in receiving email alerts when new listings that match your criteria hit the market?”
  - If the answer is yes: “Great, I’ll shoot you an email with some properties I think you’ll be interested in and then keep you updated with new listings. In the meantime, if you see something you want to view, let me know, and I’ll set an appointment for us to walk through it. ”

Exercise 4.1	
How effective is the short-term (i.e., first day and then 7–10 days after initial inquiry) follow-up in your digital leads system?	
How effective is the long-term (i.e., up to a year after initial inquiry) follow-up in your digital leads system?	
How effective are your scripts for calling digital leads? What are their strengths and areas for improvement?	
What immediate steps could you take to enhance your digital lead follow-up?	

Websites

Having a website for your business is an effective way to connect with digital customers. It allows you to create and share helpful content to educate prospective clients and promote yourself as an expert source about your local market. If you already have a site, consider whether or not it is doing all it can to set you apart from your competition. Make sure that your site is mobile responsive so that you don't lose mobile leads.

Be Consumer-Focused

Mike Parker, CRS comments that when he started his real estate career in 1986, it was all about image (brand). Back then, personal marketing was not as it is today. When he developed his own website, it changed everything. The challenge became providing personalized, relevant content to target groups. The Internet enables the delivery of distinctly different content to distinctly different groups. For example, it became possible to easily develop different content targeted at specific niches such as first time buyers, generations, rural, urban, condos, eco-friendly, etc.

Mike's advice is to have a "sticky" website where people are compelled to come back again and again, not necessarily for real estate information, but for *anything that's important to them*.

- Consider using available website content sources instead of spending hours creating your own.
- Potential sources for real estate content include: HouseLogic.com, Realtor.org, KeepingCurrentMatters.com, DavidKnox.com, and RealMarketReports.com. Note that some providers charge a fee for their content.

IDX Search

Consumers want information about not just your listings but all current listings, so one of the key features of a successful website is an IDX search. (Please see **Appendix J**: Mike Parker IDX Search.) The search should be instantly visible to consumers when they visit your site. When possible, offer advanced search filters, such as school district search, so that customers can generate more targeted results.

Neighborhood and Community Information

Consumers are not just searching for properties. They are looking for certain lifestyles. Provide information about the community, including schools, restaurants, service providers, attractions, recreation, and other features that relate to quality of life. This sort of hyper-local content is an area where you can really establish a point of difference between your website and large aggregator sites like Zillow and Trulia.

Stealth Sites

Most potential home buyers and sellers may want to explore anonymously before making contact with an agent. They may avoid your calls and not respond for fear of getting a high-pressure sales pitch. This is where stealth sites come into play.

Stealth sites are lightly branded websites that allow buyers to search MLS listings and let sellers get an estimated value of their home. By providing consumers valuable information in a non-threatening way while allowing you to request their lead information, these sites offer an incredible addition to your marketing strategy. However, be sure that stealth sites comply with state-specific marketing regulations, such as the requirement for displaying the owner's name and address on the bottom of the page. Before setting up your own stealth site, check your state's requirements. (Please see **Appendix K1–K4**: Mike Parker Stealth Sites.)

Generating Traffic: SEO and PPC

To help generate leads, you need to optimize your website for search engines. SEO is not an exact science because search engines like Google regularly update their algorithms. Because it is difficult to stay ahead of the curve in relation to SEO, many successful agents rely on professionals to help them optimize their sites. Many website solution providers make this available as part of their package.

Pay-per-click (PPC) advertising is another option for driving traffic to your site. PPC is sponsored online advertising that is used on a range of websites, including search engines, where an advertiser only pays if a web user clicks on their ad. PPC providers include Google AdWords, Facebook, and Bing Ads. As with SEO, many agents pay professionals to manage their PPC campaigns.

Agent Examples: Third Party Google AdWords Management

http://www.collinsgrouprealty.com

Greater Hilton Head, South Carolina

Chip Collins works with a third party consultant on his Google AdWords strategy, which is an evolving process. The consultant monitors key words for their market and recommends pay structures for how to best take advantage of them. Chip connected with this consultant through a referral from a company partner in his local SOI.

http://www.morleygroup.com

Huntsville, Alabama

John Morley, CRS works with BoomTown, the current provider for his website solution, to manage his Google AdWords campaigns. They provide an automated black box system that allocates funds based on how well certain key words are working. He has found that it doesn't end up costing any more to use a third party, and it is well worth it. Getting the campaigns right requires a lot of expert knowledge, so it would be challenging for an agent to do it on their own.

Exercise 4.2	
Do you currently have a personal business website? If not, what steps will you take to get one?	
How effectively do you provide consumer-focused content to attract customers and keep them coming back?	
What topics can you address on your site to appeal to customers?	
What sources could you draw upon for relevant content?	
What new stealth sites could you develop to attract more Internet leads?	
How effectively are you attracting traffic to your site, either organically or via PPC?	
What immediate steps could you take to increase your website traffic?	

Other Sites

Business Listing on Google Places

Google Places allows you to officially mark your business's presence on Google Maps. A basic Places listing includes contact information such as your business's physical address, phone, and email address, but you also can add photos, videos, and special promotions to show customers why they should choose you. Clients can also post reviews to your listing. Best of all, claiming your Google Places listing is free.

Reviews

In addition to content you create and share, consider content others create about you. Encourage clients who have had positive experiences to post reviews of you on sites like LinkedIn, Yelp, Zillow, and Google Places.

Also, periodically check to see if anyone has posted negative reviews about you. To monitor what is being said about you online, you can set up free Google Alerts using your name and company name as keywords. Once your alerts are set, you will be notified via email when new instances of these keywords appear online.

If you do receive a negative comment, respond immediately. Instead of apologizing, write something like, "I hear you are unhappy with the service I provided." Then give your email and phone number and invite that person to discuss the issue. This shows other people you are professional and welcome feedback to improve customer satisfaction.

Craigslist

Some agents like craigslist because it does not require a fancy website to generate and capture (typically free) high-quality leads. One potential benefit of the site is that it allows you to target multiple ads for the same property that highlight different approaches. You also can focus on specific niches to target your marketing, such as starter homes, particular property styles, foreclosures, or certain neighborhoods.

Because craigslist also lets users write headlines for listings, you can pitch properties to prospective buyers. A catchy headline is key to getting people to open your ad. For example:

- Hard to find . . .
- Low maintenance
- Foreclosure or short sale
- "This home is so ugly I wouldn't send it to my ex-wife!" (taken from an actual foreclosure ad in Las Vegas)

Craigslist recently removed the ability to embed clickable links in pages that take users to another site. You still can include links in ads, but the only way customers can visit a URL is by copying and pasting it into their Internet browser location bar. Thus, be sure to include your phone number to make it easy for customers to contact you.

Zillow and Trulia

Consumers are searching on real estate sites like Zillow and Trulia, so make sure that you have an effective presence there. Tips for enhancing your profiles include:

- Update your profile to include past sales
- Use a friendly, recent picture
- Include all of the zip codes that you will service
- Include links to your website and social media
- Make sure you are attached to your listings
- Encourage clients to post reviews. Statistics show that an agent with a minimum of five reviews will get more views

As with any other lead source the key is to follow up quickly and incubate effectively. (Please see **Appendix L:** Mike Parker Trulia Backend.) A recent REAL Trends performance study reveals that:

- 45 percent of consumers expect an initial response from an online inquiry within 15 minutes
- 56 percent of consumers expect a response from their agent within 30 minutes
- 89 percent of consumers said that response time was very important when choosing their agent
- 45 percent of inquiries on real estate websites never receive a response

Some potential products for enhancing your responsiveness include:

- **Fivestreet:** Automatically follows up and routes leads in the first five minutes
- **BombBomb:** Integrates video into your email campaigns and correspondence
- **Better Voice:** Provides customized local numbers, call routing, and automatic message transcription

Some agents have negative feelings about sites like Trulia and Zillow, but don’t let your attitudes about the source hinder your responsiveness to leads. If you don’t like communicating with consumers via these particular portals, you can always shift the conversation to another forum once you have made a solid connection.

If you develop an effective presence on Zillow and Trulia, highlight it to your advantage during listing presentations. Sample script to communicate this value: “Mr./Ms. Seller, I have buyers who are calling in your zip code because I’m the featured agent. As the neighborhood expert, I can help you get your home sold faster.”

Social Media

Participating in social media can demonstrate to consumers that you have a large sphere of influence and product knowledge in your community and market. Using these forums can provide you an opportunity to distinguish yourself from the competition and connect with customers. (Please see **Appendix M**: Sasha Farmer Facebook Sneak Previews and **Appendix N**: Kyle Killebrew Events and Facebook.)

Integrate social media into everything else you are already doing to attract and convert leads and to market properties. Make sure that all of your online profiles are complete, current, and consistent. Sharing links to neighborhood or lifestyle information or non-real-estate content posted on your blog can bring consumers back to your site.

Examples of how real estate agents can use social media for their businesses include:

- Working SOI, use it like an interactive database
- Converting leads to appointments
- Prospecting – listening to/viewing conversations (Twitter/Facebook) on these platforms to identify people who may need your services. Example: A person who wrote on their Facebook page that they just “fired” their agent or took a new job.
- Segment friends into lists and create groups to target communications—e.g., past clients, neighborhoods, social groups.
- Refer to agents in other markets. Monitor your long distance connections for life events and make a referral if they are buying or selling out of your service area.
- Hold online “coffee meetings” or other events to connect with customers, other agents, or local business people
- Create a “town hall” space for your community for people who want to lurk before connecting with an agent
- Share client success stories

Exercise 4.3	
What websites do you currently use for lead generation and conversion? How satisfied are you with them?	
Are any of your online profiles incomplete or inaccurate? If yes, what steps can you take to update or delete them?	
Are your online profiles consistent across various sites? If not, what steps can you take to better coordinate them?	
How effectively do you monitor reviews of yourself online? What steps can you take to solicit more positive reviews and respond to negative ones?	
How effectively do you encourage interaction via social media?	
What steps can you take to prompt increased engagement with your online connections?	

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Converting Leads into Closings

RESIDENTIAL REAL ESTATE COUNCIL

5 CHAPTER

Traditional Leads

In This Chapter

Overview

Direct Mail

Farming

Phone

Events

Open Houses

Networking and Affiliates

Upon completion of this chapter, you will be able to:

- Develop direct mail and geographic farming campaigns
- Use the phone to follow up more effectively with customers
- Consider hosting community or client events or open houses
- Network with affiliates to generate business

Chapter 5: Traditional Leads

Overview

Though some people may dismiss traditional lead sources as old fashioned, many agents still generate a significant amount of business using these established methods. Different people respond to different types of marketing, so it’s best to use a mix of online and offline to cover your market and generate a variety of quality leads.

Also, as more agents emphasize online methods, using offline techniques can help you set yourself apart from your competition.

Direct Mail

Consumers are overwhelmed with email, so now they will pay more attention to direct mail if it’s done correctly. Additionally, the U.S. Postal Service’s Every Door Direct Mail (EDDM) service has made direct mailings even more affordable. With EDDM, you don’t individually address postcards. Instead, you identify a specific zip code or carrier route, and your piece is delivered to every active address in that area.

Many service providers will help you create and print your piece as well as get your mailings to the post office for you. For example, EDDM Experts online service will print and prepare your mailings for delivery. Cards will be delivered roughly two weeks after you place an order. The cost is approximately $1,100 for 3,000 cards, and volume discounts are available.

Always include a call to action to prompt a response from recipients of your mailings. Ideally, you should encourage them to reach out to you for more information so that you can shift them from being leads to prospects and get them tapped into other channels of your communication flow. (Please see **Appendix O**: Sasha Farmer Just Sold Card.)

Agent Example: Staying Top of Mind with Past Clients

http://www.lakecountyilhomes.com

Lake County, Illinois

Leslie McDonnell, CRS uses direct mail to stay top of mind with past customers. She sends one postcard per month. As a call to action, she often features drawings that clients can register for as a way to capture current email addresses. (Please see **Appendix P**: Leslie McDonnell Past Client Postcard.) For some of her postcards, Leslie uses EDDM Experts. For others, she produces the artwork in-house using Microsoft Publisher or Adobe Illustrator, prints on pre-cut postcard paper, and mails via the MyPostageRateSaver online store.

Leslie's current 12-month plan for mailings to past clients includes:

January	HUD to previous year's closed and orphans tax tip
February	Drawing for restaurant gift cards for Valentine's day
March	Drawing for Barnes and Noble gift cards for National Reading Month
April	Drawing for spa gift cards to relieve tax stress
May	Drawing for Visa gift cards for Mother's Day
June	Drawing for Cubs tickets for Father's Day
July	Drawing for Omaha Steak gift certificates
August	Drawing for Target gift certificates for back to school supplies
September	Invite them to a private movie showing (Only $400 to rent out the theater)
October	Pumpkin giveaway
November	Free pies for Thanksgiving
December	Ornaments or Blockbuster gift cards

Farming

Establishing a geographic farm in a local neighborhood is a great way to gain additional listings. It requires commitment, but if you are persistent and consistent, farming can yield great results. Farming can involve various methods including direct mail, door knocking, postcards, newsletters, email, or any other form of advertising. Many agents are currently achieving success using the direct mail method.

The first step is picking a neighborhood. Consider sales price in relation to your business goals, and make sure that the area is manageable in terms of size. Since you will need to market to the area regularly, if it is too large, you will end up spending too much time and money to cover it effectively.

You also want to make sure that you are or will become an expert in the area so that you can demonstrate expertise in your marketing and follow up effectively when residents respond to it. Further, you want to select an area that has a decent amount of turn over. Farming won't be worth your while if people stay put and don't often list in the area.

The key to farming, as with any lead generation method, is purposeful frequency. If you contact homeowners multiple times, they will begin to recognize your brand and be more likely to contact you when they are ready to sell.

The next step is deciding what to send people in your farming area. As with online methods, providing items of value will win over more potential customers than a hard sell will. Information like hyper-local market statistics or information about recent comps that you have sold will both provide value and demonstrate your expertise.

Agent Example: Geographic Farming

ALEX
MILSHTEYN
Associate Broker / Realtor
Reliable / Responsive / Results

http://www.alexmi.com

Ann Arbor and Washtenaw County, Michigan

Alex Milshteyn, CRS uses direct mail farming to touch many households without being intrusive and penetrate a market to create brand awareness. He uses direct mail to conduct geographic, demographic, specialty, and affiliate farming campaigns.

He uses a 24-month plan to geographically farm an area. Based on his experience, this length of time is necessary to make a farming strategy work. The key is sending out pieces at regular intervals and staying on message. He works with a graphic designer to create a plan each year for his postcards. Though he might make minor adjustments, his design and messaging stay relatively consistent. Most homeowners likely look at each postcard for just a few seconds, so maintaining consistency helps to build recognition. Frequency of touch is more important than changing content.

Alex's 24-month geographic farming plan:

- Months 1–2: Mailing every 10 days
- Months 2–4: Mailing every 15 days
- Months 3–12: Mailing every 21 days
- Months 13–24: Mailing every 30 days
- Months 2, 6, 12, 24: Letter indicating sold properties from the past six months

Exercise 5.1	
What direct mail campaigns do you currently use? What audiences do they target?	
What geographic farming campaigns do you currently use? What potential areas could you target to grow your reach?	
What ideas for content do you have for your mailings? How can you provide value and include a call to action?	
For direct mail, what resources do you have for printing and mailing in-house? What tasks would you need to outsource?	

Phone

The purpose of the initial contact with a lead is always to strive to talk “live” with the person. A recent study by WAV Group found that the average agent only makes 1.5 additional attempts to contact a lead after the initial attempt. According to Brian Hoialmen, vice president of sales at Kunversion, agents should use a “call cycle” on a new lead before giving up because 85 percent of leads will not respond until seven to eight attempts are made. He suggests using the 3/2/2/1 method:

- 3 calls the first day
- 2 calls the second day
- 2 calls the third day
- 1 call on the fourth day

If you aren’t connecting when you call, Brian suggests that you don’t leave a message until your last attempt (i.e., after the seventh or eighth call).

In addition to being diligent about calling new leads, you also should consistently call through your database. Remember to follow up each phone call with a personal note thanking them for talking to you. Let them know that you are available to help with any questions they may have about real estate.

As mentioned in Chapter 2, Sasha Farmer, CRS calls through her database twice a year. She sticks to this plan by consistently making calls each week. Create a system for yourself to make sure that you are staying in touch with people who can provide you with repeat and referral business.

If you're not sure what to say when you call, create scripts for yourself. Also, keep in mind that the call doesn't have to be long to be effective. You just need to let clients know that you remember them and want to help.

Events

Events can be an effective way to attract new customers as well as show appreciation for current ones. Some agents use attendance at community events to connect with new people. Rather than obnoxiously giving a hard sell, they are more subtle, letting their role as a real estate professional come up naturally during conversation. Involvement in the local community can allow you to enjoy yourself while growing your business. You can even piggyback on local events if you are hesitant about hosting your own. For example, if your town has an annual Fourth of July fireworks display, consider inviting several of your top clients to join you at the event. By bringing blankets and providing refreshments, you can serve as a "host" without having to find a venue or plan a separate party.

Community events like charity drives and school-sponsored activities also can provide forums for name recognition and top of mind awareness. Giving back can be an effective way to connect with people while demonstrating your commitment to the community. You may support a favorite charity by holding an event and inviting your sphere of influence. Or, if you are not a party person, think about hosting a virtual charity fundraiser and ask invitees to make a donation.

Consider sponsorship of local minor league or school sports teams to get exposure for your business. You also could volunteer with other extracurricular activities such as ballet classes, choir, math competitions, science fairs, or debate competitions, just to name a few. Seminars for buyers and sellers and housewarming parties for buyers also are popular client-related events. (Please see **Appendix Q**: Alyce and Seth Dailey Housewarming Party Invitation and **Appendix R1 and R2**: Leslie McDonnell Housewarming Party.)

If you would like to add an event to your geographic farming plans, consider sponsoring a community-wide garage sale once or twice a year. Even if you don't live in a neighborhood, you still can volunteer to support local events. Planning a garage sale provides multiple opportunities to touch residents. You can walk the neighborhood a few weeks before to inform people and put signs up, bring refreshments the day of the event, and send follow-up thank you notes after the event. If your farm neighborhood has an HOA, contact them about potential sponsorship opportunities to see if you can get involved in existing ones or spearhead a new one.

Open Houses

Though some agents have stopped doing open houses, others view them as great sources for leads. For this method to be effective, you need to connect with buyers, capture their contact information, and begin demonstrating your value. Greet people at the door, and thank them for coming. Provide information about the property and let them look around. Don't appear as if you are pressuring them or they likely won't want to provide their real contact information.

After you've allowed visitors to wander through the house on their own for a bit, reconnect with them and see if they have any questions and gauge what they like or dislike. If you approach them respectfully and earn their trust, this can be your prime chance to land them as a client.

To demonstrate your value and make them want to hear from you again, provide free, relevant content that relates not only to the property, but also to the home buying process in general. A home buying guide that includes useful tips, checklists, and mistakes to avoid works well. Make sure that the titles in this document are written to grab clients' attention and that its design and content are high quality. You can provide a hard copy of this packet, or you can offer to email it to the buyers. Try to capture their contact information including email and phone number.

Also, use this initial time you have with them in person to make a good first impression and begin qualifying the buyers. Asking about their interest in the property can create an opening to discuss what they are looking for in a home. You can offer to send them information about additional properties that might meet their needs, or if things are going well, you can set up an appointment to talk further.

Networking and Affiliates

Another good source of leads is creating relationships with other business people in your area. You can build reciprocal relationships with service providers such as:

- Financial Advisors
- CPAs
- Lenders
- Title Companies
- Inspectors
- Appraisers
- Moving Companies
- Relocation Companies
- New Home Builder Reps
- Lawn Care Companies
- Contractors and Home Repair Companies

When establishing relationships with vendors, make your expectations known. Leslie McDonnell, CRS makes it clear from the outset that the relationship should be mutually beneficial—that referrals should go both ways. When someone contacts her about creating an affiliation, she uses the following script: “It is my policy to share business with those who provide an indication that this will be a reciprocal relationship. Therefore, if you want to work with me, a great way to raise your hand would be to send some business my way, and you will see what will happen!”

In addition to her business referral happy hours and the letters she sends to local business people (see Chapter 3), Sasha Farmer, CRS also reaches out to local companies in Charlottesville, Virginia, to offer them help with relocation services. She focuses on small to mid-sized organizations who bring in only between 1–10 new hires per year and thus don’t have as many relocation resources already established in-house.

Sasha offers to work with these companies to provide community tours to potential employees who would be moving into the area from out of town. She sends the potential buyers a lifestyle questionnaire to learn about their needs: e.g., do they want to live near a park? Do they need easy access to the airport? Would they prefer downtown or a cozy subdivision? Do they have pets?

She picks the potential buyers up from the airport and shows them Charlottesville. Based on the results of their questionnaire, Sasha makes suggestions about locations and shows them homes matching their needs. She also provides them with a branded relocation guide that includes historic information about the county and region, tax and cost of living comparisons, average school scores, a moving checklist, and a list of local employers to help spouses find employment. (Please see **Appendix S1–S3**: Sasha Farmer Branded Relocation Guide.) This partnership benefits the businesses and the potential buyers, while also establishing Sasha as the local expert and providing new sources of business.

Agent Example: Radio and TV Ads

http://www.morleygroup.com

Huntsville, Alabama

John Morley, CRS generates most of his seller leads through marketing and attributes a significant amount of his business to radio and television ads. These ads provide an 800 number and website information, inviting sellers to contact him to receive a free listing information packet (http://www.morleygroup.com/ads.php).

These ads increase his visibility and build his reputation. Though the expense is higher than other forms of marketing, these methods work with John's business model.

Exercise 5.2	
How effectively do you use the phone to follow up with leads?	
How effectively do you use the phone to keep in touch with your sphere?	
What immediate steps could you take to make better use of the phone in your lead generation and conversion?	
How effectively do you use face-to-face opportunities to attract leads?	
How effectively do you use face-to-face opportunities to keep in touch with your sphere?	
What immediate steps could you take to make better use of networking and community, client, or charity events in your lead generation and conversion?	

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Converting Leads into Closings

CHAPTER 6

Closing and Beyond

In This Chapter

Upon completion of this chapter, you will be able to:

- Apply techniques for staying top of mind with clients, referrals, and orphan clients
- Identify top three priorities to incorporate into your business strategy
- Create an Action Plan to implement your SMART goals and how you will measure

Chapter 6: Closing and Beyond

Overview

According to the 2017 National Association of REALTORS® Profile of Home Buyers and Sellers:

- 89 percent of buyers said they would use their agent again, but only 12 percent of buyers reported using an agent they had worked with previously.
- 85 percent of sellers said they definitely or probably would use their agent again, but only 25 percent reported using an agent they had worked with previously.

If most clients have positive experiences with their agents, why don't they work with them again? It's simple—because the agents don't stay in touch.

If you treat closing as if it's the end of the client relationship, you will be wasting valuable opportunities and leaving money on the table. Your goal should be to nurture relationships with your customers so that they not only use you again but also become advocates of your business to other people they know. Develop follow-up systems not only for converting leads into closings but also generating repeat and referral business.

Stay Top of Mind

As discussed in Chapter 2, you should maintain an accurate database to provide great customer service and work more efficiently. Once you have a contact in your database, maintain that connection, and keep the customer in your communication flow.

Keeping in contact with your database takes discipline and patience, but the payoff is rewarding. Technology is essential to staying in touch with clients, but don't lose sight of the fact that personal touches are also an important component of exceptional customer service. Making time to call people in your database, have lunch with top clients, or hold a client event can strengthen your relationships and increase repeat and referral business.

Make sure that you gather all of the information that you need to stay in touch. Have clients confirm their contact information and provide dates for anniversaries and birthdays. Some agents have clients enroll in V.I.P. Programs as part of their closing systems. This enrollment enables them to get the information they need, sets expectations for continuing contact, and communicates appreciation.

- The Nellis Group in Northern Virginia (http://www.nellisgroup.com) automatically enrolls clients in its V.I.P. Program as soon as the transaction is complete. Benefits include: consideration to receive complementary tickets to local sporting events, monthly giveaways and contests, home anniversary gifts, birthday wishes and prizes, charity donation in their honor, ability to rent The Nellis Group's Moonbounce, invitations to special festivals and events, and a free holiday pie.

- The Leslie McDonnell Team in Libertyville, Illinois, enrolls clients who list with them in a Client Perks Club, which provides: notary service (with appointment), photocopying (up to 50 copies), fax service, amortization schedules, property tax information reviews to verify assessments, CMAs, and use of the team's moving truck.

If clients are pleased with your service, ask them to write reviews on Yelp or Facebook. If they were not pleased, ask them for specifics on how you can improve. This demonstrates professionalism on your part and your commitment to enhancing your customer service.

The only good reason not to follow up with a customer is if you had a bad experience working with them. If someone is unreasonable, unpleasant, or otherwise toxic, learn to walk away. If you cultivate enough clients you want to work with, you can say no to the ones you don't want to work with again.

To effectively stay in touch, target your marketing to past clients and use a mix of channels. Consider sending monthly newsletters, anniversary cards for their closing date, or offering a free yearly comparative market analysis. Whatever your post-closing strategy, keep in contact so that you are always top of mind. Stay in touch with clients according to their preferences. Take special care of people who send you referrals.

Referrals

Every experienced agent knows the power of referrals. People enjoy working with people they like and trust, and those who come highly recommended by people they like and trust. Referrals are warm leads that typically convert better and faster than any leads from any other source.

A referral lead:

- Costs less to acquire

- Has a higher potential for retention and loyalty

- Takes a shorter time to close than leads from marketing

Creating customer advocates and harnessing them to drive more referrals is key to growing your business. This is especially true in today's highly social digital environment. Word of mouth is a primary factor behind most purchasing decisions, and its influence is particularly high when the purchase involves a relatively expensive item, like a home. Further, people value the opinions of friends and family more than any other information source. Creating advocates among people in your database allows you to tap into this dynamic. Best of all, everyone in this situation wins—your clients and their connections feel well taken care of and you earn more business.

When you get a referral lead, don't assume that they already know what they want. The person who referred them may have done so because they need your help getting on track. Have a process that allows you to discover their needs and motivation. As with other leads, educate them about how you work and how they can receive the most value from becoming your customer. Even though they come to you with goodwill already established, don't take for granted that they are ready to close.

If you're already receiving a steady stream of referrals, make sure that you are effectively converting them. If some referrals are slipping through the cracks, assess and revise your systems to improve your conversion rates.

Educate and Show Your Appreciation to Referral Sources

In addition to asking for referrals, let clients know the best way to provide them to you. Clients can hand out your business cards or provide your contact information to a referral, but then you have to wait for the referral to reach out to you. Instead, request that clients create opportunities for you to follow up directly.

One effective method is requesting that the client send an introductory email to connect you with the referral. James Nellis, CRS with The Nellis Group in Alexandria, Virginia, uses the following script:

"We are thankful of the trust you put in our team and would love the opportunity to assist someone you know. Please ask for permission to send a simple email introducing us, and then we can take it from there. We are so thankful every time you tell someone about us. You are the reason for our success."

Another benefit of this script is that it highlights appreciation for the referral source. Let clients know that you are grateful when they send someone to you. Send a handwritten thank you note along with a small gift that lets them know you value their support. Also, communicate back to them the impact that you have on the people they refer. If you let them know that their referrals chose to work with you and that you helped them achieve their goals, you can further reinforce referring behaviors and motivate past clients to continue sending people your way.

Orphan Clients

Keeping in touch with your clients after closing can generate repeat and referral business. Many agents also keep in touch with buyers who purchase their listings. As the statistics from NAR indicate, many agents do not keep in touch with their buyers after the transaction is complete. Thus, adding this group to your database can create opportunities for new business.

Many agents simply add these “orphans” to their follow-up systems so that they receive the same communications as other people in their database. For example, Leslie McDonnell includes orphans in her 12-month plan for mailings to past clients.

You also can consider creating targeted communications for this group. If you do reach out to them, make sure that you are focusing on the value that you provide as an agent rather than implying anything negative about the agents who worked with them. Also, use discretion when adopting orphan clients. For example, if you have a strong relationship with a particular agent, you may want to skip adding their buyers to your communication flow to avoid any potential offense.

Exercise 6.1	
How effectively do you stay in touch with your database?	
How effectively do you make use of various communication channels? What channels can you increase or add?	
What other touches can you add to existing systems to stay in better touch?	
What new systems can you create to help you stay in better touch with particular segments of your database?	
How effectively do you generate referrals?	
What steps can you take to better educate clients on how to bring you referrals?	
How do you show your appreciation to referrals? What other techniques could you use to show gratitude and positively reinforce the behavior?	

Always Assess Your Strategies

As discussed in previous chapters, tracking and analyzing your leads are important components of effective lead conversion. Pay attention to how well certain lead sources and systems are performing for your business. Analyze cost per lead in relation to the dollars that it generates, and determine if an approach is worth your while. (Please see Chapter 1.)

Learn from your mistakes; reinforce your successes; and adjust your lead generation and conversion strategies to improve your ROI. Keep in mind that increasing your touches and tweaking your communication strategies are just as important as spending more money on lead sources and marketing.

Another important component of improving your process is getting feedback from customers. Ask clients to fill out surveys after closing. Periodically check in with your database to see if you could be doing more to serve them and help them with their real estate needs.

Leigh Brown, CRS of Leigh Brown and Associates (http://www.leighsells.com) in Concord, North Carolina, has an innovative strategy for soliciting input from people in her sphere. She created a (non-paid) Board of Directors consisting of local business people in her SOI. She meets with the board once each month for breakfast, at which time she presents sales strategy ideas and asks for their feedback. Board members can change monthly, but some serve for multiple months. It's a great way to keep her top of mind; the members on the board like the recognition, and Leigh gets valuable feedback.

Identify Priorities for Implementation

To effectively apply what you have learned, you need to identify your top priorities for implementation. What are the top areas that you want to work on after this class?

- Attract more leads?
- Improve your lead response time?
- Enhance your lead nurturing?
- Focus more on a particular lead source?
- Try out a new lead source?
- Develop your database?
- Improve the categorization of your contacts?
- Develop new systems?

- Revise existing systems?
- Improve your lead tracking?
- Follow up more effectively with clients after closings?
- Others?

Creating an Action Plan

Once you identify your top goals for implementation, you need to determine how success will be measured, and list specific steps you will take to successfully reach your goals.

You can’t put everything you have learned into practice all at once, so you need to set priorities. By clearly defining your goals and writing them down, you can better focus your energy and make progress. Revisit your goals often to remind yourself where you want to end up.

The SMART method provides useful criteria for helping you set achievable goals. SMART goals promote focus because they help you define what your future state looks like and how your success will be measured.

SMART goals are:

- **S**pecific
- **M**easureable/Meaningful to you
- **A**ttainable/As if now
- **R**ealistic/Responsible
- **T**imely/Toward what you want

Know the difference between a specific goal and a vague goal. For example, saying, “I want to save more money” is vague compared to “I will save $500 over the next six months.” When you set a goal to save $500, you can measure your progress as you increase the amount of money you have set aside. This will help to motivate you to keep pushing forward.

Setting a vague goal, such as “I want to save more money,” makes it difficult to measure success. How do you know if you have accomplished this goal? Is having an extra $5 enough, or do you need $5,000? To make goals measurable, you need to identify milestones that will allow you to check your progress.

Example SMART goal: "*I will win a minimum of 25 listings, specifically in my farm area, over the next calendar year.*"

To be successful, you also need to ensure that your goals are realistic. Considering factors such as your schedule, workload, and current knowledge, do you believe you can attain an objective you set? If not, then set a different goal, one that is attainable for you in the present.

Based on the notes you have taken during course activities, identify your **top 3 SMART goals** for implementation over the next 30 days and the steps you will take to achieve them. Keep in mind that, just as with goals, you want the steps you identify to be as specific as possible. Think of this as the start of a to-do list. If a task isn't specific enough that you would know when to cross it off as done, break it down into a smaller task.

Top 3 SMART Goals for Implementation

Goal 1	
How will you know if you have achieved it?	
Specific steps you will take to start achieving it	1. 2. 3. 4. 5.

Goal 2	
How will you know if you have achieved it?	
Specific steps you will take to start achieving it	1. 2. 3. 4. 5.

Goal 3	
How will you know if you have achieved it?	
Specific steps you will take to start achieving it	1. 2. 3. 4. 5.

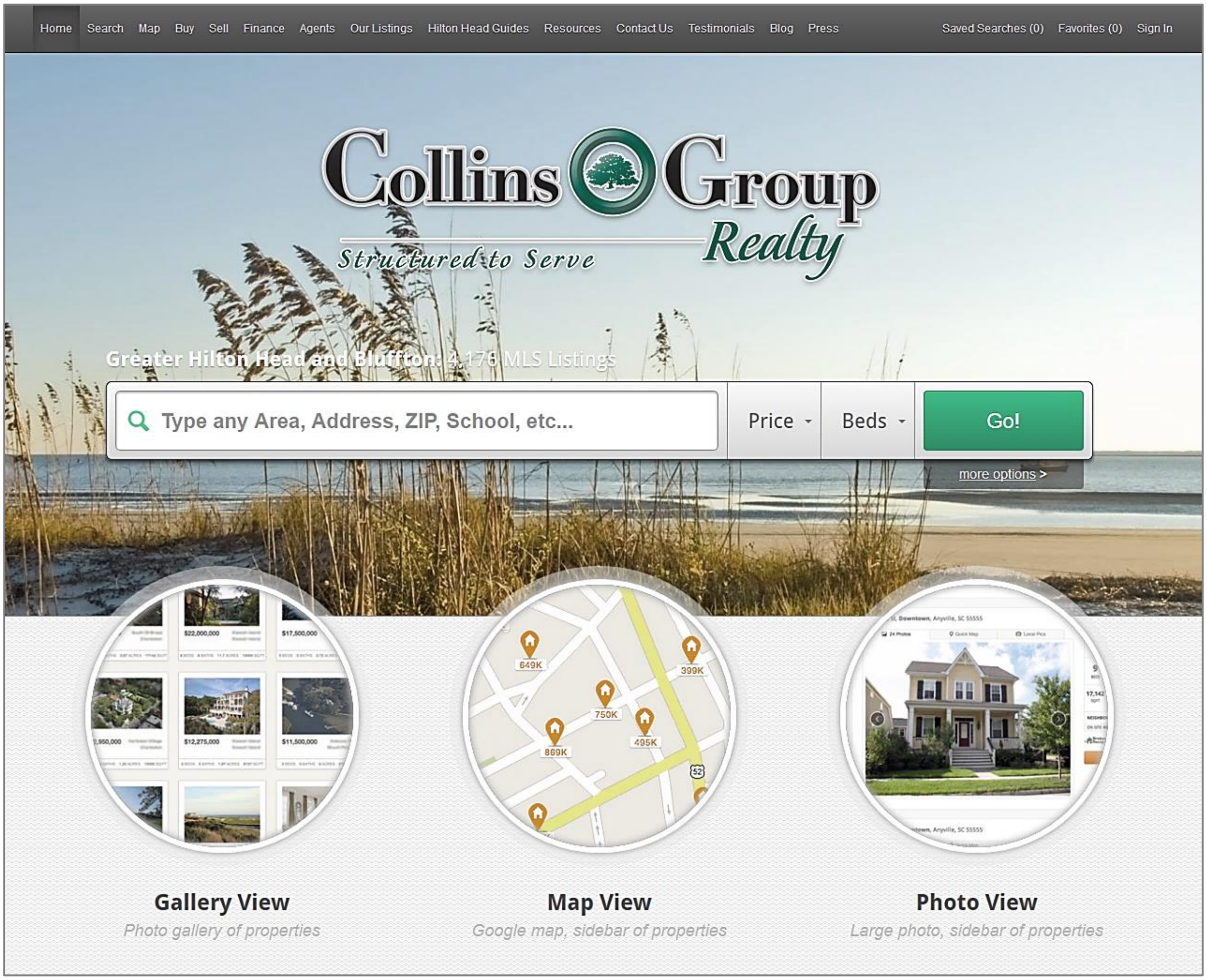
Notes

Notes

Notes

Appendices

Appendix A: Chip Collins Site Powered by BoomTown



http://www.collinsgrouprealty.com

Appendix B: Mike Parker Sample Newsletter

Homes For Sale Blog

May 2014

EXISTING-HOME SALES STEADY, PRICES UP

Existing-home sales remained level this March while home prices saw moderate growth, according to a recent report by the National Association of REALTORS (NAR). Existing-home sales, which include recently purchased single family, townhomes, condominiums, and co-ops were down 0.2 percent to a seasonally adjusted 4.59 million units for the year.

Average (Mean) Sales Price of Existing Homes by Region

Date	U.S.	Northeast	Midwest	South	West
2012	225,400	277,900	173,700	198,800	278,100
2013	245,500	288,900	186,900	216,400	317,400
2013/10	245,000	284,000	185,400	213,100	325,300
2013/11	243,600	283,000	182,200	211,600	325,500
2013/12	246,700	281,200	185,800	218,300	325,600
2014/01	236,600	282,300	173,100	203,000	316,700
2014/02	236,600	275,000	170,100	206,700	321,600
2014/03	246,800	284,200	180,000	217,200	332,900

Statistics from the National Association of REALTORS®

NAR chief economist Lawrence Yun expected to see more activity. "There really should be stronger levels of home sales given our population growth," he said. "In contrast, price growth is rising faster than historical norms because of inventory shortages. With ongoing job creation and some weather delayed shopping activity, home sales should pick up, especially if inventory continues to improve and mortgage interest rates rise only modestly."

Nationally, the median time for homes to sell was 55 days in March, a decrease from 62 days in February, and 62 days from March 2013. Thirty-seven percent of March home sales were on the market for less than a month.

OPTIMISM FOR FIRST TIME BUYERS

First-time buyers accounted for 30 percent of purchases in March, up two percent from the month before. NAR president Steve Brown believes this number can be higher. "There are indications that the stringent mortgage underwriting standards are beginning to ease a bit, particularly regarding credit score requirements, but they remain a headwind for entry-level and single-income home buyers," he said.

"We also have tight inventory in the lower price ranges where many starter homes are found, but rising new-home construction means some owners will be trading up and more existing homes will be added to the inventory. Hopefully, this will create more opportunities for first-time buyers," Brown said.

Mortgage giant Freddie Mac reports that the average commitment rate for a 30-year, fixed-rate mortgage was hovering at 4.34 percent during March. These historic low rates optimize housing affordability for today's home buyer.

Appendix C1: Mike Parker Sample Real Market Reports

REAL ESTATE MARKET REPORT

BOONE COUNTY

Sunday, May 18, 2014

Mike Parker Team
HUFF Realty
mike@mikeparker.com
859-647-0700

MARKET SUMMARY TABLE

A = Average Value
M = Median Value
N/A = Not Available

Price Range Low	Price Range High	538 ACTIVE [1] Num #		Days on Market	Current List Price	281 PENDING [2] Num #	Pend Ratio	332 OFF-MARKET (last 6 mos) [3] Num #	664 SOLD/CLOSED (last 6 months) [4] Num #		Days on Market	Original List Price	Final List Price	Sold/ Closed Price	List-Sale Ratio	ABSORPTION RATE (months of inventory) Est. Mos.
$0	$49,999	5	A	34	$ 43,780	8	62%	4	22	A	63	$ 45,011	$ 40,124	$ 37,240	93%	1.4
			M	27	$ 44,999					M	21	$ 42,360	$ 37,950	$ 41,400	109%	
$50,000	$99,999	35	A	102	$ 83,509	21	38%	19	79	A	67	$ 86,237	$ 80,396	$ 76,400	95%	2.7
			M	65	$ 89,900					M	45	$ 89,000	$ 84,900	$ 77,660	91%	
$100,000	$149,999	88	A	98	$ 126,263	70	44%	69	165	A	53	$ 133,504	$ 130,722	$ 127,660	98%	3.2
			M	58	$ 126,500					M	34	$ 134,800	$ 130,000	$ 128,900	99%	
$150,000	$199,999	119	A	114	$ 177,095	86	42%	59	154	A	81	$ 179,220	$ 175,736	$ 171,637	98%	4.6
			M	60	$ 179,800					M	54	$ 179,735	$ 174,950	$ 171,000	98%	
$200,000	$249,999	57	A	83	$ 226,351	31	35%	55	97	A	65	$ 232,650	$ 229,629	$ 223,101	97%	3.5
			M	39	$ 223,000					M	26	$ 230,000	$ 228,500	$ 224,000	98%	
$250,000	$299,999	57	A	94	$ 280,685	35	38%	33	46	A	74	$ 289,927	$ 284,238	$ 277,894	98%	7.4
			M	62	$ 284,900					M	23	$ 293,450	$ 284,990	$ 281,250	99%	
$300,000	$349,999	49	A	86	$ 326,432	12	20%	26	42	A	80	$ 343,655	$ 337,282	$ 325,491	97%	7
			M	43	$ 325,000					M	46	$ 340,000	$ 339,900	$ 328,450	97%	
$350,000	$399,999	34	A	86	$ 378,642	10	23%	14	20	A	65	$ 382,965	$ 376,825	$ 368,386	98%	10.2
			M	60	$ 379,115					M	50	$ 382,400	$ 375,330	$ 364,427	97%	
$400,000	$449,999	14	A	84	$ 428,493	4	22%	5	18	A	114	$ 464,734	$ 447,116	$ 422,392	94%	4.7
			M	45	$ 425,000					M	95	$ 449,740	$ 449,490	$ 424,500	94%	
$450,000	$499,999	24	A	113	$ 477,717	2	8%	13	5	A	49	$ 505,656	$ 505,656	$ 474,699	94%	28.8
			M	39	$ 477,500					M	4	$ 493,420	$ 493,420	$ 481,115	98%	
$500,000	$549,999	12	A	86	$ 529,053	1	8%	7	3	A	127	$ 565,352	$ 569,032	$ 537,000	94%	24
			M	65	$ 530,848					M	127	$ 550,000	$ 568,095	$ 533,000	94%	
$550,000	$599,999	11	A	65	$ 576,761	1	8%	13	1	A		$ 567,434	$ 567,434	$ 567,434	100%	66
			M	54	$ 575,000					M		$ 567,434	$ 567,434	$ 567,434	100%	
$600,000	$649,999	4	A	65	$ 612,500	0		4	4	A	46	$ 630,258	$ 628,032	$ 625,533	100%	6
			M	40	$ 612,500					M		$ 629,512	$ 629,512	$ 629,512	100%	
$650,000	$699,999	3	A	39	$ 672,967	0		5	5	A	143	$ 731,896	$ 705,896	$ 665,576	94%	3.6
			M	45	$ 669,900					M	9	$ 685,000	$ 685,000	$ 662,500	97%	
$700,000	+	26	A	150	$ 935,301	0		6	3	A	59	$ 944,613	$ 909,946	$ 876,946	96%	52
			M	97	$ 844,450					M	69	$ 949,000	$ 899,000	$ 850,000	95%	
Market Totals		538				281	34%	332	664							4.9
Market Averages				99	$ 282,604						69	$ 207,227	$ 202,621	$ 196,429	97%	
Market Medians				58	$ 219,900						39	$ 175,000	$ 170,700	$ 167,625	98%	

Favors Sellers — Favors Buyers

Date Range (Off-Market & Sold) = 11/17/2013 to 05/18/2014
Data believed to be accurate but not guaranteed.

Status = [1] A; [2] P; [3] X, C; [4] S
Area = K09, K10, K11
Property Subtype = SFRD

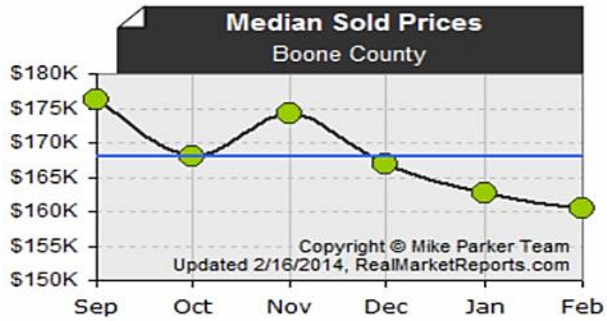
http://www.realmarketreports.com

Appendix C2: Mike Parker Sample Real Market Reports

The recent history of sales can be seen in the two charts below. The median sold price for the last 30 days was $160,500 with a DOM of 58 days.

Since the recent DOM is greater than the median DOM for the last 6 months, it is a negative indicator for demand.

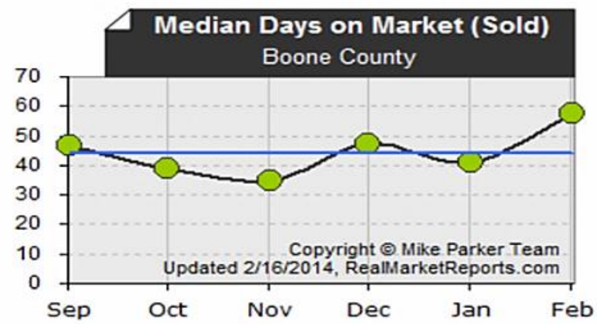
It is always important to realize that real estate markets can fluctuate due to many factors, including shifting interest rates, the economy, or seasonal changes.



Analysis of the absorption rate indicates an inventory of 3.9 months based on the last 6 months of sales.

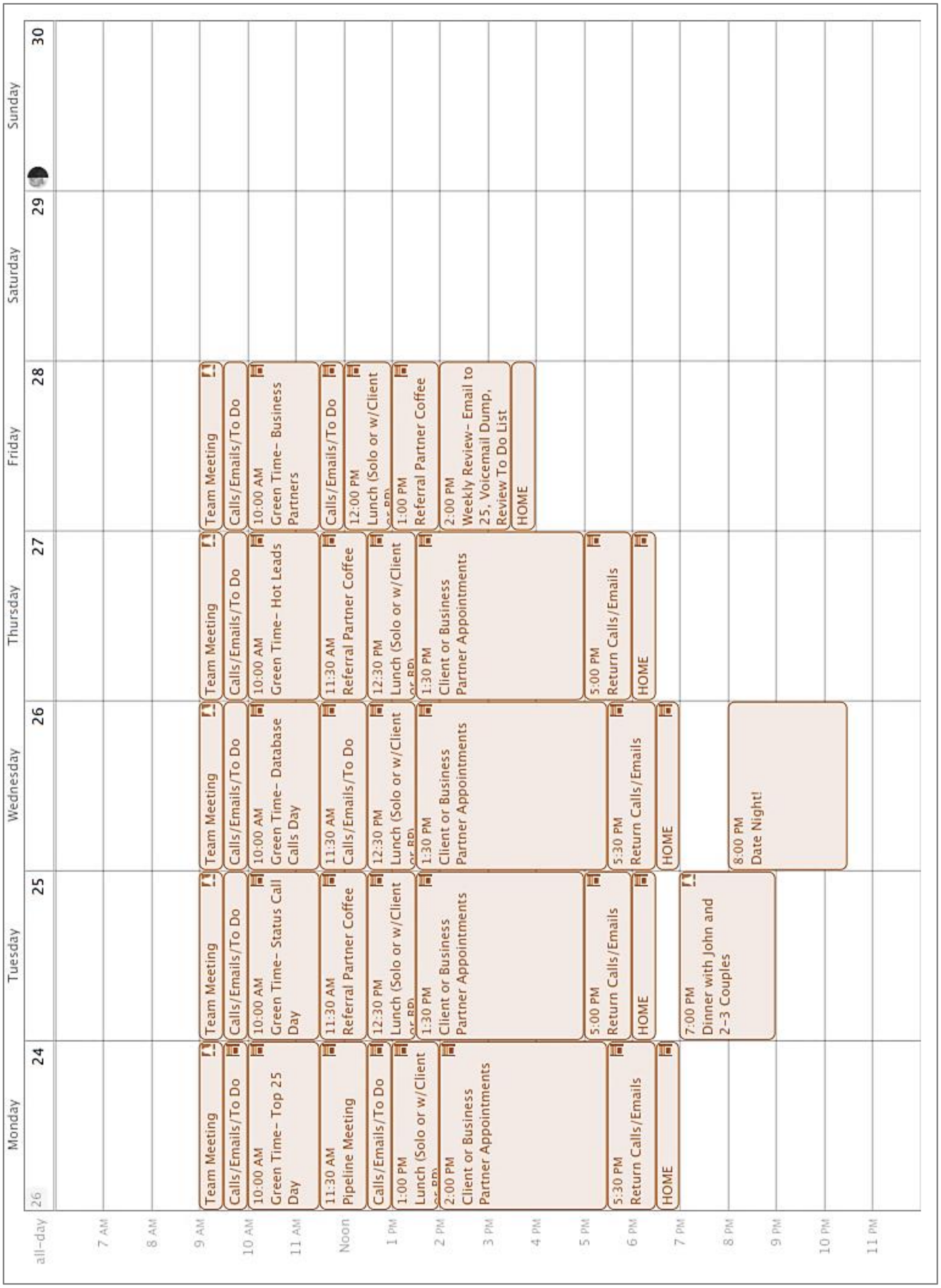
This estimate is often used to determine how long it would take to sell off the current inventory of properties if all conditions remained the same.

The median list-to-sales ratio for this area is 97.2%.



Powered by Real Market Reports

Appendix D: Sasha Farmer "Ideal Week"



Appendix E: Mike Parker Sample Drip Campaigns in Real Pro

Real Pro SYSTEMS

Campaigns

Create Campaign

Name	Size	Test	Letters	Edit	Copy	Delete
Bank Owned	67					
CMA Request	2					
Email Home Search	112					
FSBO Buyers	0					
FSBO Sellers	0					
General Follow-Up	633					
Internet Home Search	2					
Lead Follow Up	1					
NKY Homes Report	0					
Old Leads	0					
Smart Zip	0					

http://www.realprosystems.com

Appendix F: Sasha Farmer Lead Tracker

LEAD TRACKER

Month: Year:

*	NAME	SOURCE (in detail)	RESULT OF CALL	PHONE#/ E-MAIL	# CALLS
	1				
	2				
	3				
	4				
	5				
	6				
	7				
	8				
	9				
	10				
	11				
	12				
	13				
	14				
	15				
	16				
	17				
	18				
	19				
	20				
	21				
	22				
	23				
	24				
	25				

TOTAL

	CCR	PCR	PC	PF	RLTR	AD	BUS	A/R	BLDR	Total Month
G										
L										
T										

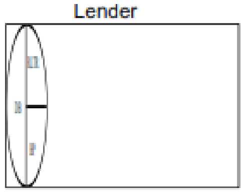
______ x 35% = ______
Total Written Transactions
______/______

Transactions ______ div. by
Leads ______ equals
Closing Percentage ________

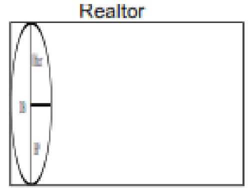
L = Leads T = Transactions G = Goal
Number of circled Hot Leads at the end of the month: ______________________

The Perfect Model

Lender



Realtor



Appendix G1: Sample Sasha Farmer Letters

SASHA C. FARMER, REALTOR®, CRS, GRI, ABR, SRS

245 RIDGE-MCINTIRE ROAD, SUITE 1 · CHARLOTTESVILLE, VA 22903 · 434.466.3212 · SASHA@SASHAFARMER.COM

Dear ,

The Greatest Generation. That's certainly how I've always thought of them. My grandparents. Two who I am honored and humbled to still have around, and the other two whom I've already lost. Much like my husband and many of our peers- I respect, adore, revere, and idolize my grandparents. Since childhood, I have looked to them with honor and intrigue. When I was little, they were some of my very best friends. When I became an adult, some of my biggest heroes. They lived lives entirely UNLIKE mine, made sacrifices for my generation that my generation has a difficult time comprehending and absorbing, and they expect nothing in return.

A childhood friend of John's – Clay Broga – has just released a feature-length documentary called Honor Flight. It is an incredible movie about the nationwide movement to recognize World War II veterans with an Honor Flight- a trip from their hometown to Washington DC, to see the memorial constructed in their honor, and be thanked for their service and sacrifice for our Country. For many of them, this trip may be one of their final days in the sun before the end of their lives. 1000 WWII veterans die every day- if there is still one in your life or in your memories, I hope you can relate to this message and to my dedication to sharing it.

I am asking you for a favor. John and I were both incredibly touched and enriched by this movie, and it's something we'd like our family, community, and peers to have the opportunity to see. We are currently working to organize a screening of this film here in Charlottesville, and if you have a veteran in your life- I hope that you will commit to seeing it. If nothing else, it will provide a new respect and understanding for these men and women, and what they've done to pave the way for today's freedoms. I feel truly blessed to have seen this movie in time to do something about it, and I hope you will too. I hope to see you there.

And to the greatest generation- on behalf of my fellow "whippersnappers" – thank you.

Your REALTOR ® and friend,

Sasha Farmer

Sasha C. Farmer, REALTOR ®, CRS, GRI, ABR, SRS, e-Pro

Charlottesville Area Association of REALTORS Sales Associate of the Year, 2012
Voted Best Realtor in Charlottesville and Best Runner Up, C-Ville Weekly 2010, 2011
CELL: (434) 260-1435 | EMAIL: sasha@sashafarmer.com | WEB: www.charlottesville365.com
MONTAGUE, MILLER & COMPANY, REALTORS®

Appendix G2: Sample Sasha Farmer Letters

SASHA C. FARMER, REALTOR®, CRS, GRI, ABR, SRS
245 RIDGE-MCINTIRE ROAD, STE 1 · CHARLOTTESVILLE, VA 22903 · 434.260.1435 · SASHA@SASHAFARMER.COM

Dear ,

Finding a new home for a friend or client is always filled with emotions and excitement. In fact, finding a new home for ANYONE (or thing) has a lot of similarities. ☺

John and I have spent the last several years fostering puppies and dogs from the Charlottesville Albemarle SPCA. Often, we will foster puppies that are too young to be spayed and neutered until they are old enough to have their surgery and be adopted out. Other times, we foster dogs who are severely injured, in need of serious TLC, or those who just need some socialization skills and time running around with our own pup, Trooper. It continues to be one of our absolute favorite things to do, and I only wish we had more time to do it!

We've learned MANY lessons from these little ones. It seems that they can forgive anything, regardless of what they've experienced in the past. They greet every day with energy and a wagging tail. They know when to ignore eveything (including you) and just take some time to relax. And when they leave your home to go to their forever home, they somehow show you that they will miss you but that they know they'll love this next home even more.

If you have a little room in your home and in your heart, I highly recommend you reach out to the local SPCA (call Susanne!) and they can tell you more about the dog fostering program. The time commitment is completely flexible, you can take dogs when you have the time, availaibility, or consistency of schedule, and you can volunteer to take anywhere from 1-10 at a time, anywhere from 2 days to 2 months to 2 years! It's certainly not clean or easy, but it will be an experience you don't ever forget, and if you're like John and I- something you will want to keep doing the rest of your life.

Besides, how can you resist these sweet little faces?

Your REALTOR ® and friend,

Sasha Farmer

Sasha C. Farmer
REALTOR ®, CRS, GRI, ABR, SRS, e-Pro

Charlottesville Area Association of REALTORS Sales Associate of the Year, 2012
Voted Best Realtor in Charlottesville and Best Runner Up, C-Ville Weekly 2010, 2011
CELL: (434) 466-3212 | EMAIL: sasha@sashafarmer.com | WEB: www.charlottesville365.com
MONTAGUE, MILLER & COMPANY, REALTORS®

Appendix G3: Sample Sasha Farmer Letters

SASHA C. FARMER, REALTOR® CRS, GRI, ABR, SRS
245 RIDGE-MCINTIRE ROAD, STE 1 · CHARLOTTESVILLE, VA 22903 · 434.260.1435 · SASHA@SASHAFARMER.COM

Dear ,

If you agree with the old saying that "Home is where the Heart is", then what better day than Valentine's Day to send a quick note of thanks and appreciation to my clients and friends, who have made these past few years so amazing, and Charlottesville such a wonderful place to call home.

What better way to celebrate than with a sweet treat? For another year, I have partnered with C'ville Coffee to offer a free "honey bunch" to any of my clients or friends who visit this week and bring this email with them, so enjoy! As you know, I am a big supporter of local food and supporting local business, so I do hope you'll also look around, try a cup of delicious coffee, or even grab my all-time favorite, the Berry Turkey sandwich, while you're there!

If you have never had a honey bunch, then consider this your lucky day! ***A honey bunch, as described on the C'ville Coffee website, is a golden brown, sweetly wholesome, freshly baked cookie. Shaped like a mini-muffin, it is made with whole oats, coconut, honey, brown sugar, butter and flour, with no preservatives added.*** They are definitely a must-try for anyone who calls Charlottesville home!

BRING THIS LETTER WITH YOU to C'ville Coffee before 2/14 and enjoy a HONEY BUNCH on us! C'ville Coffee is located at 1301 Harris Street, very near the McIntire exit off of 250, right next to Circa. Visit their website at www.cvillecoffee.com for directions!

I truly thank you for your continued support, referrals, and trust, and hope our paths will cross many times in the new year!

Your REALTOR ® and friend,

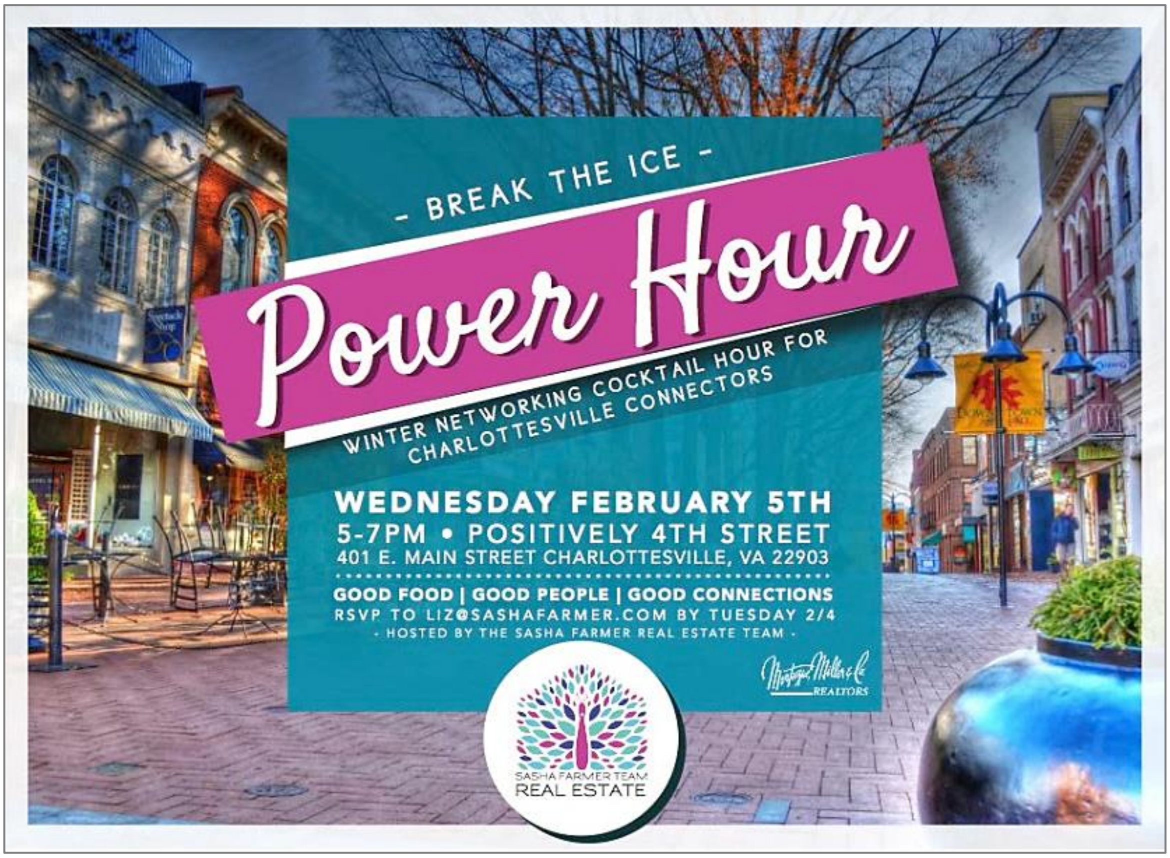
Sasha Farmer

Sasha C. Farmer, REALTOR ®, CRS, GRI, ABR, SRS, e-Pro

P.S.- If you know of anyone thinking of buying or selling this year, and they would appreciate a similar real estate experience or similar service, please pass my name on to them!

REALTOR® Magazine's Top 30 REALTORS® in the Nation Under 30, 2012
Charlottesville Area Association of REALTORS® Sales Associate of the Year, 2012
(434) 260-1435 | sasha@sashafarmer.com | www.charlottesville365.com
MONTAGUE, MILLER & COMPANY, REALTORS®

Appendix H1: Sasha Farmer Business Referral Happy Hour



Appendix H2: Sasha Farmer Business Referral Happy Hour

It is hard to believe that another year has flown past- it feels like it was just a couple months ago when our team was doing our 2012 business planning and trying to figure out what our goals and ideas would be the LAST time around. I'm sure everyone feels a bit of the same!

Something that I've looked forward to doing for a while and had planned to kick off in the new year is a **happy hour for business people, great connectors, and just people we'd like to see get to know one another.** We are blessed to know and do business with a set of really top-notch people and are always looking for a good excuse to get together with them.

We have planned a monthly gathering where we'd gather together, get to know some new people, and just share in good company. The invite list is comprised primarily of small business owners, entrepreneurs, and people who are generally doing good business in town and looking for opportunities to do more. My hope is that it would NOT become a cheesy exchanging of business cards, but instead would be a group of already-vetted professionals in town, who might find some things in common and enjoy gathering together for a casual event!

My real estate team is growing. Our trusty team now includes two full-time administrative staff and two full-time, licensed buyers agents. **My goal continues to be to provide top-notch and unrivaled real estate services to buyers and sellers in Charlottesville.**

For buyers, this means instant accessibility to homes (our 3 licensed agents make scheduling a breeze), finding off-market homes for our buyers to pursue if we cannot find their home via the MLS and currently listed properties, excellent representation and negotiation (again, several agents who can have their eyes on the pricing, inspections, and contingencies), a closing coordinator who is one step ahead of both our deadlines and those handled by the other side, and most important of all- an extremely well-respected team whose offers will be looked at seriously and competitively by other agents due to our excellent history of successful closings.

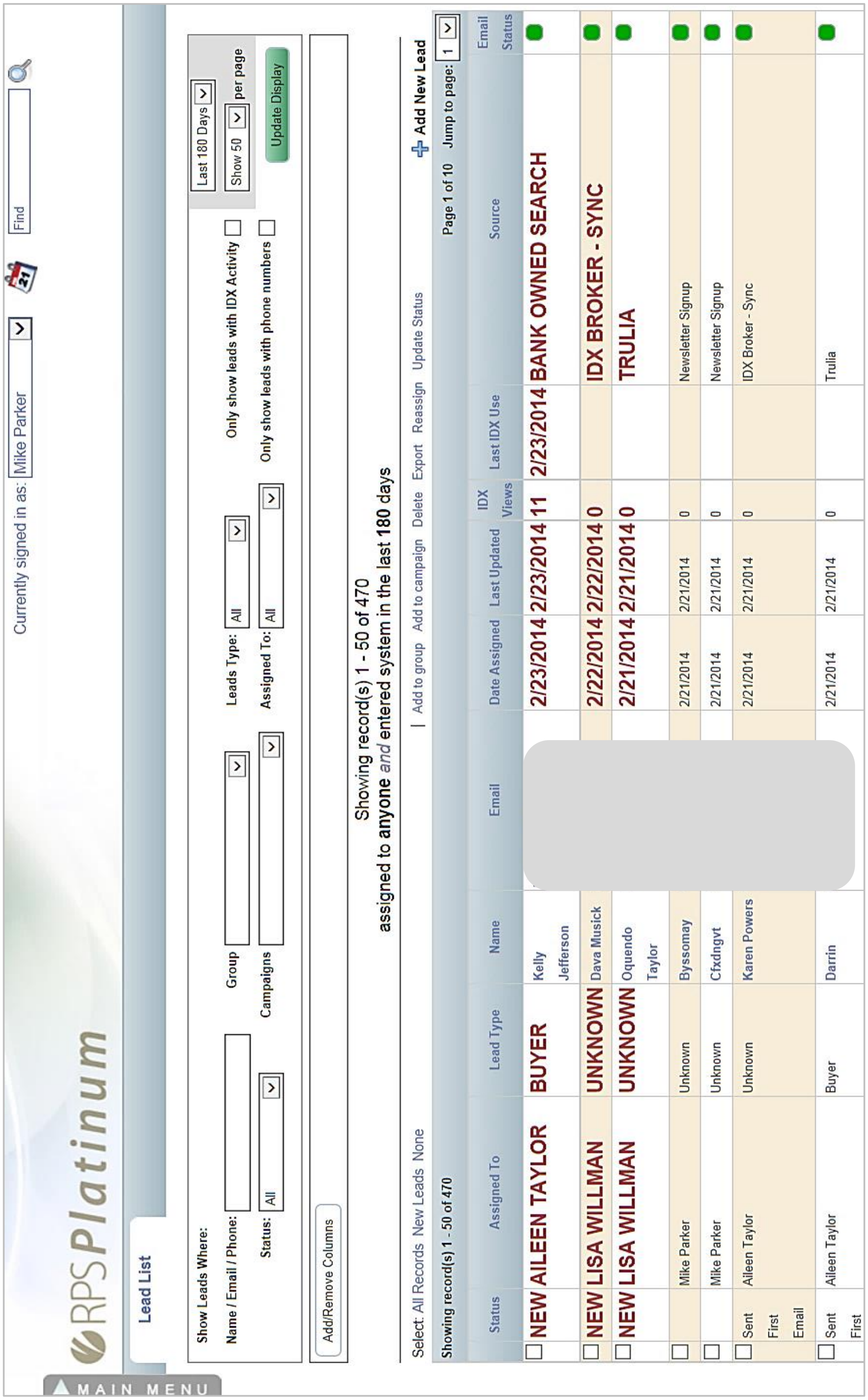
For sellers, this includes professional photography, professional staging advice, competitive and updated pricing, in-house professional graphic design of our marketing materials, direct mail reverse marketing to neighborhoods likely to buy in the target neighborhood, sneak previews on social media sites whose traffic often directly correlates with days on market, enhanced placement on Realtor.com, Trulia, and Zillow, public and brokers open houses, and more. 60% of our listings that sold last year sold in under 45 days. We are aggressive marketers and we are a great match for someone who is serious about selling their home.

My hope is that going into 2013, you will get to know our team a bit better, with an ultimate goal for us to send more referral business back and forth between our businesses. I respect you as a business person and am blessed to be surrounded by such professionals who I can trust to take great care of the many families I work with throughout the year. Be on the lookout for our evite this month and we look forward to seeing you at our kickoff event!

Thank you,
Sasha

Invitation to First Happy Hour

Appendix I1: Mike Parker Sample Real Pro Backend



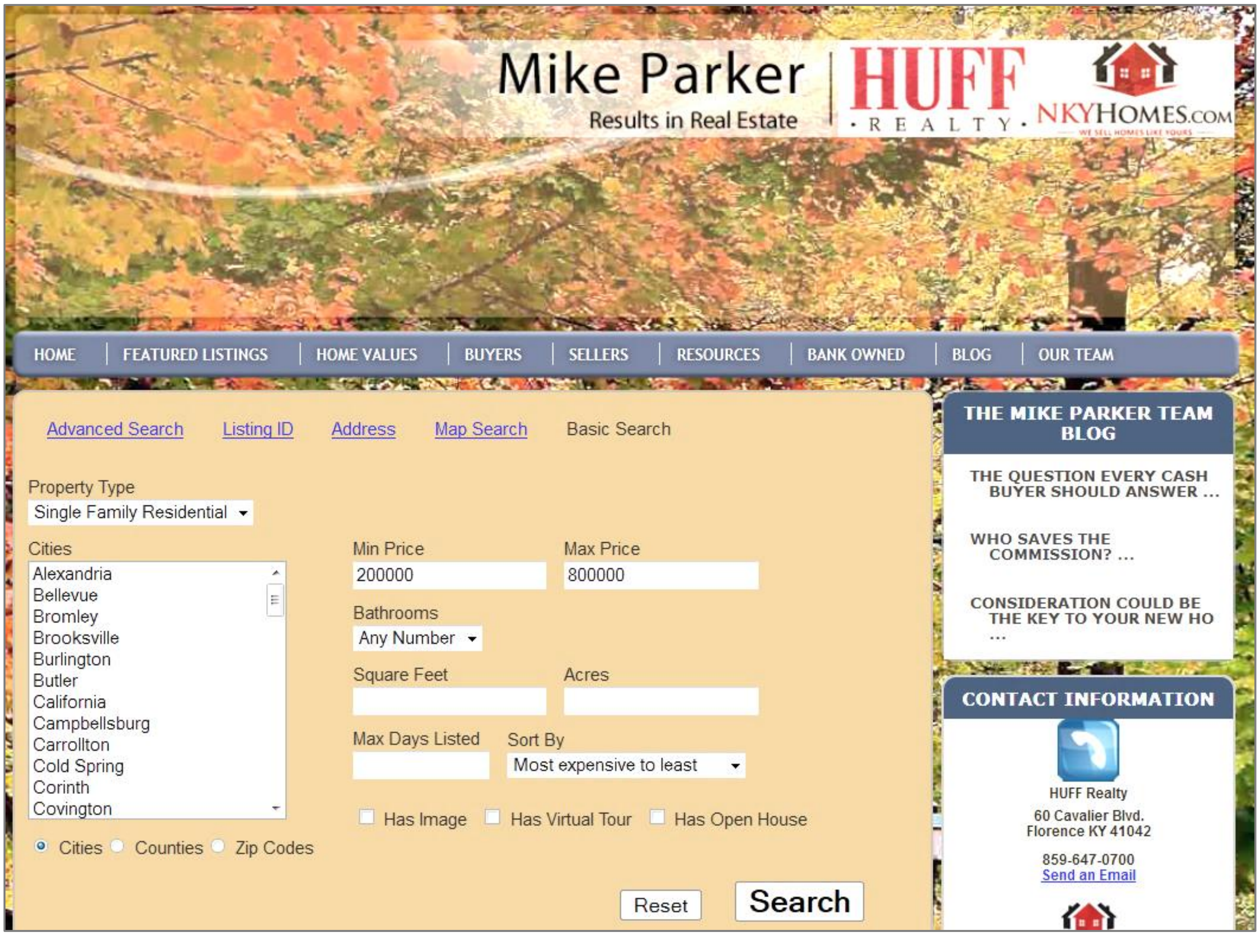
Appendix I2: Mike Parker Sample Real Pro Backend

Showing record(s) 1 - 50 of 148

Page 1 of 3 Jump to page: 1

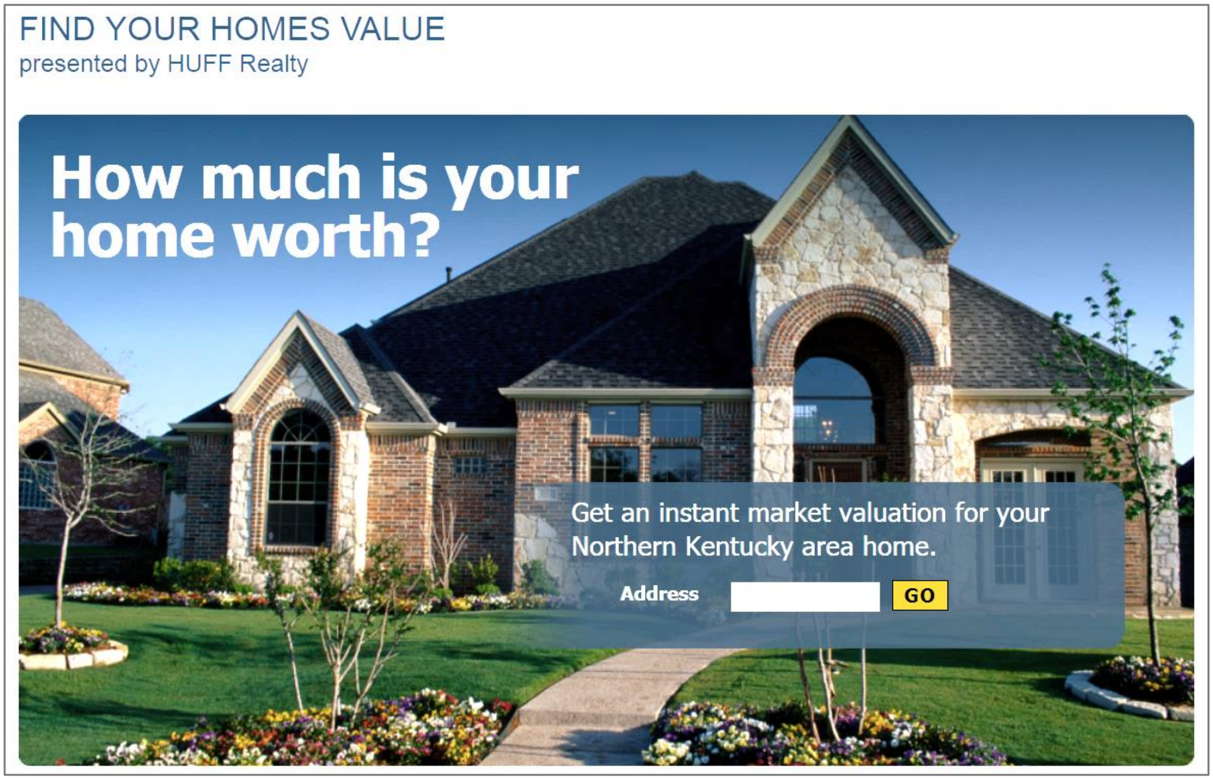
Status	Assigned To	Lead Type	Name	Email	Date Assigned	Last Updated	IDX Views	Last IDX Use	Source	Email Status
Warm	Ray Straub	Buyer	Matt Chalk		2/7/2014	2/7/2014	0		Manually Entered	
Left VM3	Ray Straub	Unknown	Amber45		1/30/2014	2/15/2014	0		Trulia	
Sent First Email	Ray Straub	Buyer	Ray Garges		1/27/2014	1/29/2014	0		Email Home Search	
Sent First Email	Ray Straub	Buyer	Rebecca Sullivan		1/27/2014	1/29/2014	0		Bank Owned Search	
Sent First Email	Ray Straub	Unknown	Anthony Rice		1/27/2014	1/29/2014	0		Trulia	
Sent First Email	Ray Straub	Unknown	Heather Krebs		1/27/2014	1/29/2014	0		IDX Broker - Sync	

Appendix J: Mike Parker IDX Search



http://nkyhomes.idxbroker.com/idx/search/basic

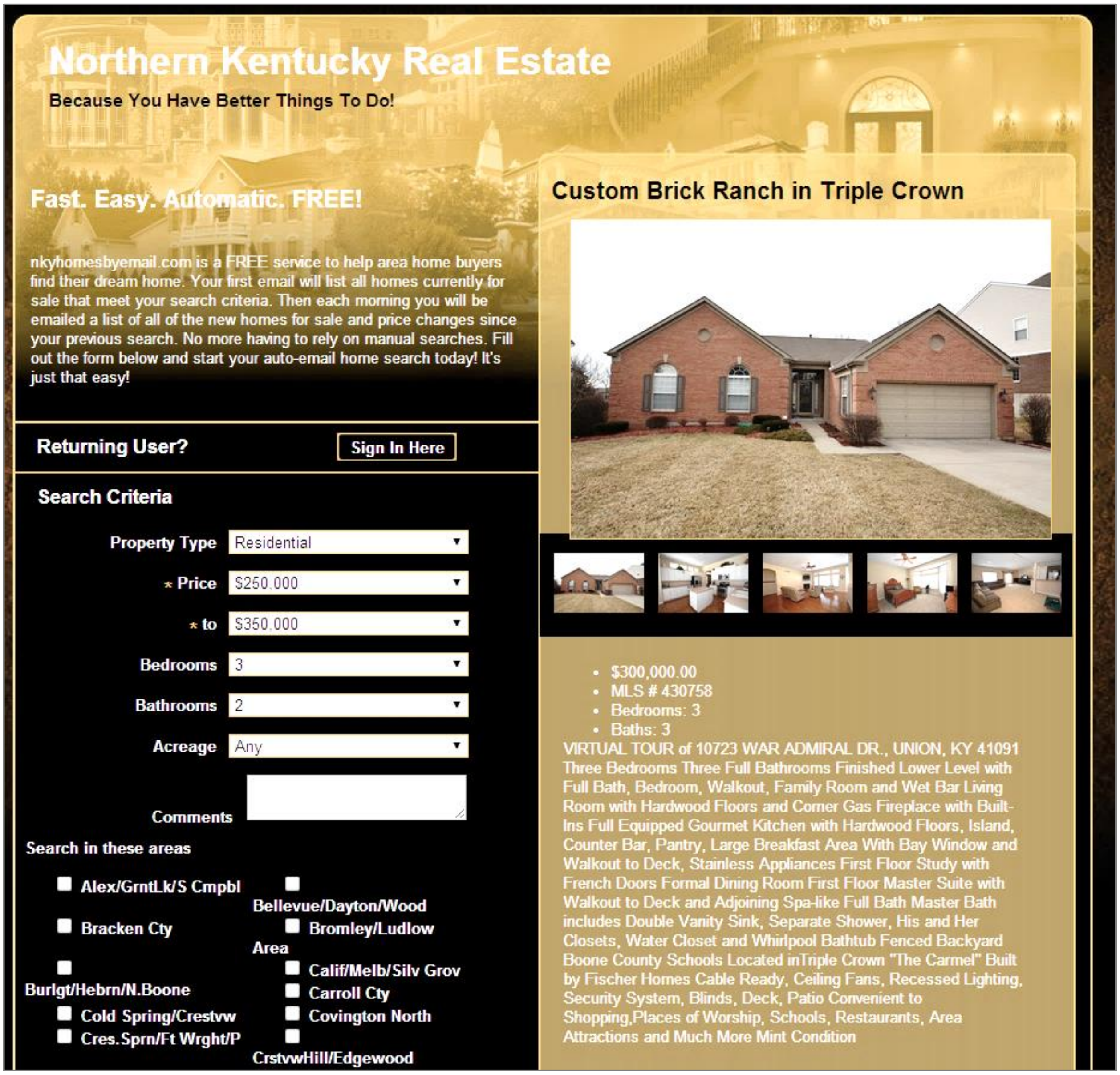
Appendix K1: Mike Parker Stealth Sites



http://www.northernkentuckyhomevalues.com

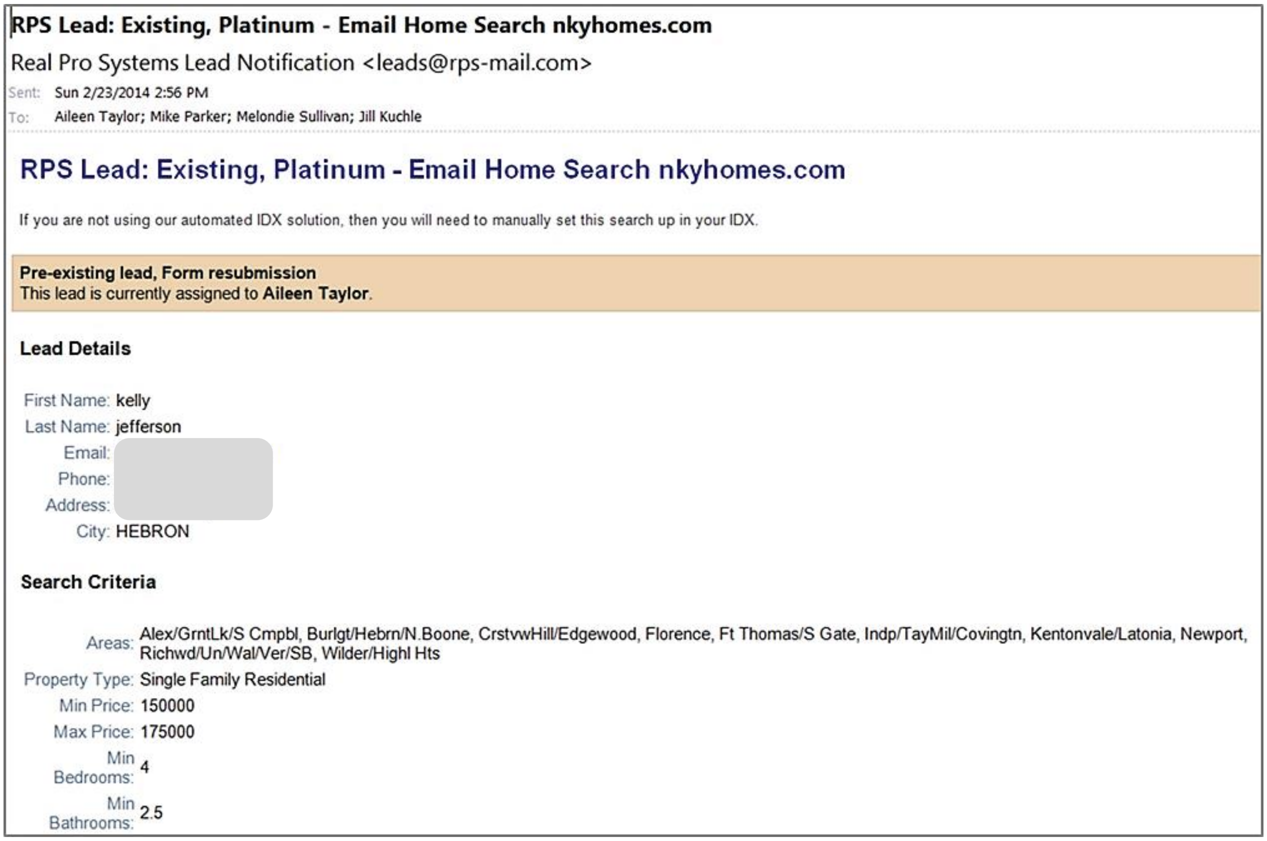
http://www.homevaluesbymikeparker.com (Powered by Prime Seller Leads)

Appendix K2: Mike Parker Stealth Sites



http://www.nkyhomesbyemail.com

Appendix K3: Mike Parker Stealth Sites



RPS Lead: Existing, Platinum - Email Home Search nkyhomes.com

Real Pro Systems Lead Notification <leads@rps-mail.com>

Sent: Sun 2/23/2014 2:56 PM

To: Aileen Taylor; Mike Parker; Melondie Sullivan; Jill Kuchle

RPS Lead: Existing, Platinum - Email Home Search nkyhomes.com

If you are not using our automated IDX solution, then you will need to manually set this search up in your IDX.

Pre-existing lead, Form resubmission
This lead is currently assigned to **Aileen Taylor**.

Lead Details

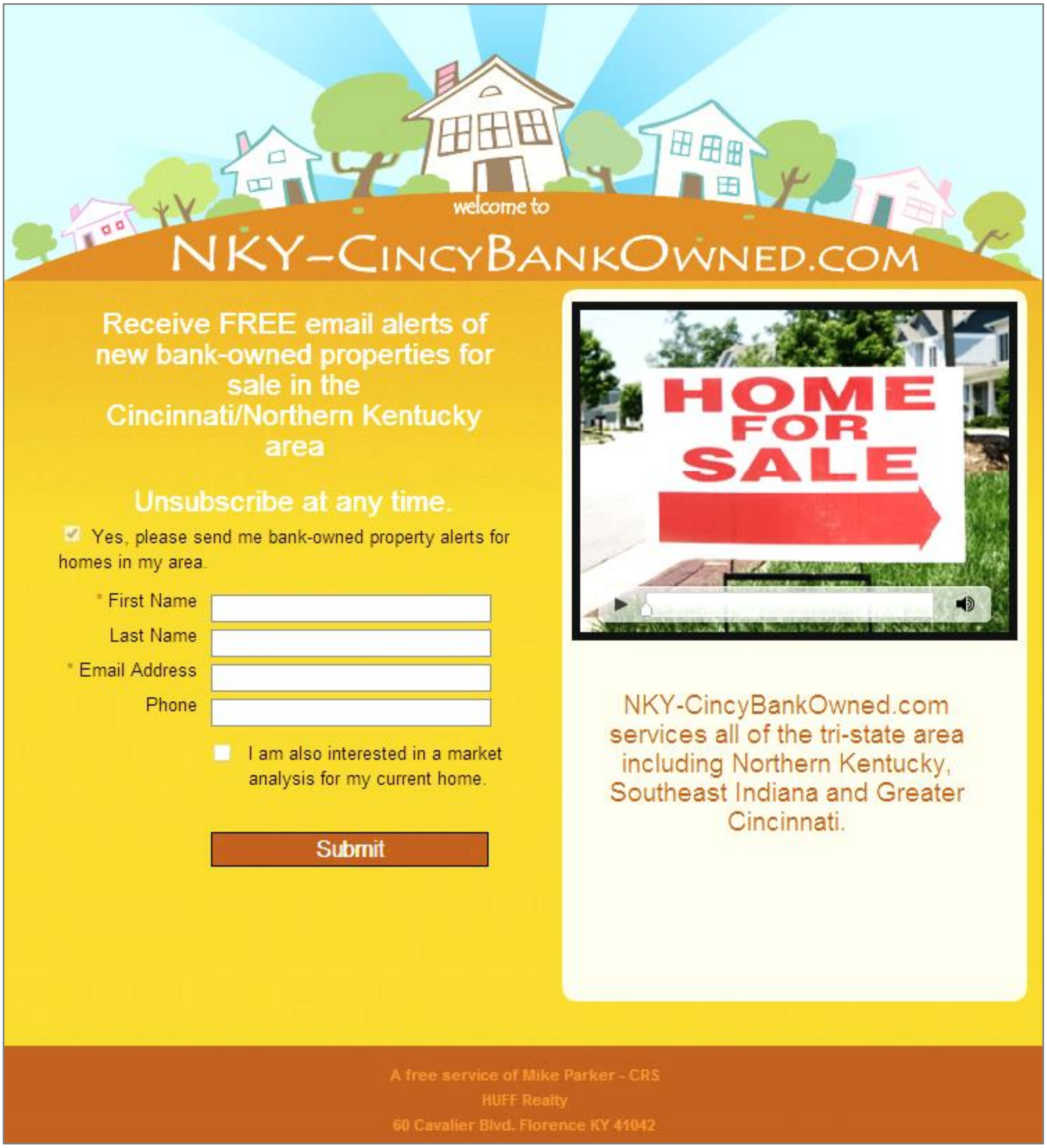
First Name: kelly
Last Name: jefferson
Email:
Phone:
Address:
City: HEBRON

Search Criteria

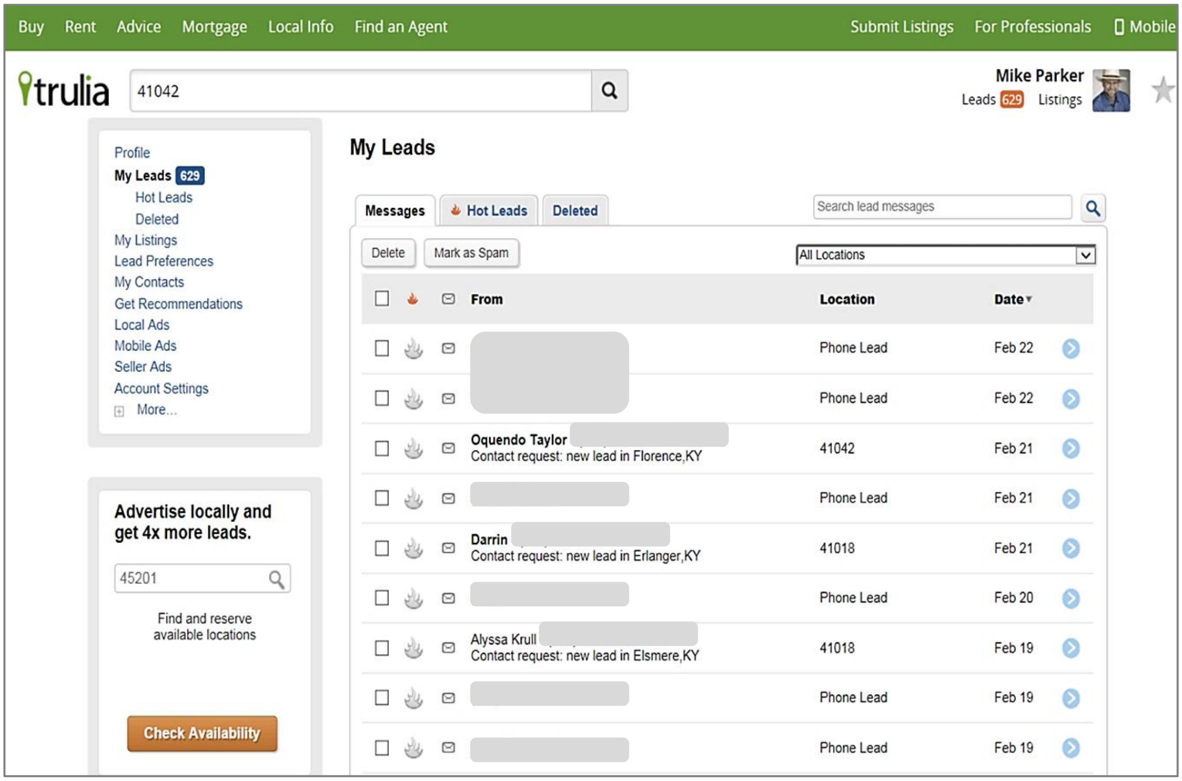
Areas: Alex/GrntLk/S Cmpbl, Burlgt/Hebrn/N.Boone, CrstvwHill/Edgewood, Florence, Ft Thomas/S Gate, Indp/TayMil/Covingtn, Kentonvale/Latonia, Newport, Richwd/Un/Wal/Ver/SB, Wilder/Highl Hts
Property Type: Single Family Residential
Min Price: 150000
Max Price: 175000
Min Bedrooms: 4
Min Bathrooms: 2.5

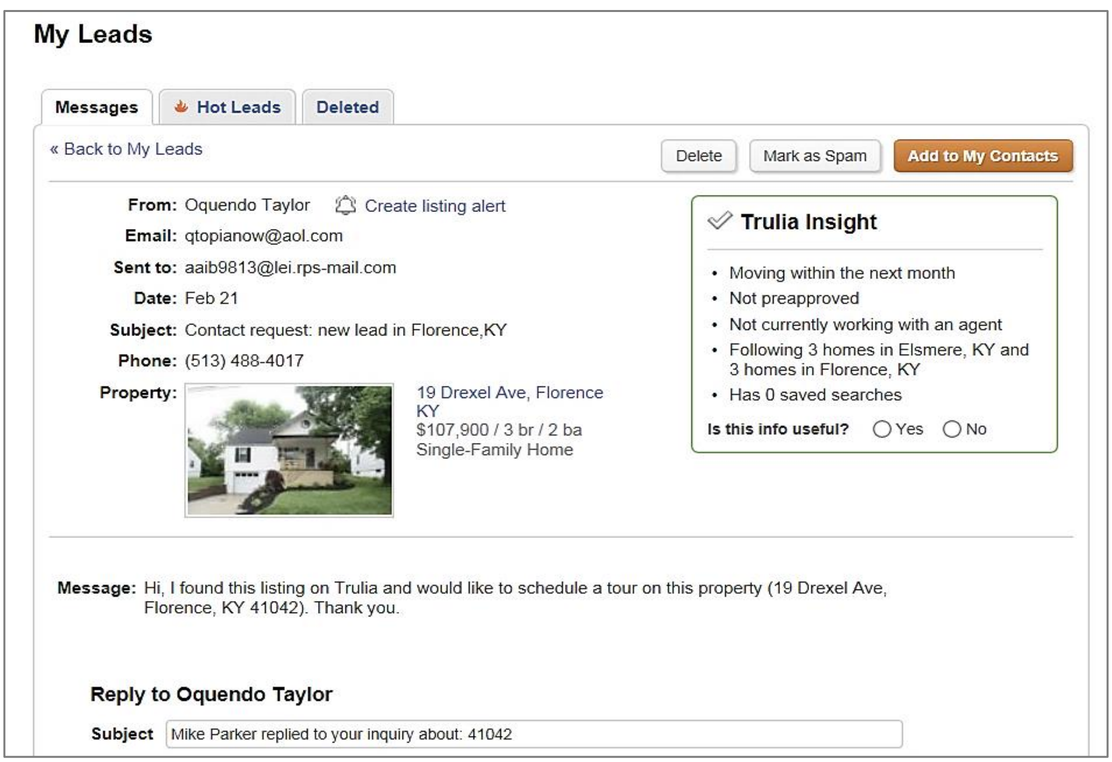
Email Home Search Stealth Site Email Notification

Appendix K4: Mike Parker Stealth Sites



Appendix L: Mike Parker Trulia Backend





Appendix M: Sasha Farmer Facebook Sneak Previews

The Sasha Farmer Team, Charlottesville Real Estate
Yesterday

Sneak Peek- Walk to UVA, Historic Charm- $350,000 (14 photos)
Beautiful home, walkable to UVA, Cabell, the South Lawn, the Stadium, and the Hospital. Above garage apartment for great investment opportunity, in-law suite, or au pair suite, too. Sneak peak - coming on the market tomorrow at $350,000!

Unlike · Comment · Share 2

The Sasha Farmer Team, Charlottesville Real Estate and 25 others like this.

Katie Nelson Marsh Is this on volley rd? I think it's my aunt and uncles old house!!
Yesterday at 2:20pm via mobile · Like · 1

Brett Batten Baker Ooooooo!!!!
Yesterday at 3:52pm via mobile · Like

Tish Price A home with character
Yesterday at 6:54pm via mobile · Like · 1

Jen Fariello I loved this home. Chris Conklin and I lived in this sweet home from 2001-2005. GREAT house.
Yesterday at 7:11pm · Like · 1

The Sasha Farmer Team, Charlottesville Real Estate Jen Fariello the photos of it when you had it listed were PRECIOUS. i wish we could borrow all of your antique cameras to spread around the house You should come see it. I think my buyers agent will be holding it open on Sunday afternoon next week!
Yesterday at 7:17pm · Like

The Sasha Farmer Team, Charlottesville Real Estate and Katie Nelson Marsh- it's Valley Road, which I assume you are talking about? very cool- send them back to come see it!
Yesterday at 7:25pm · Like

Tina Cote Dottie Kluttz, did you see this?
Yesterday at 7:31pm via mobile · Like

Dottie Kluttz oh be still my heart...
23 hours ago · Like

Leontyne Clay Peck So cute...too bad that we can't afford it.
22 hours ago · Like

Chris Conklin Loved living in that house those years. beautiful hedge along the road too. We lived there prior to Valley Rd. being dead-ended at UVA. so idyllic now. Red door... my idea, glad they left it.
22 hours ago · Edited · Like · 1

Miranda Paige Young Beautiful house
22 hours ago · Like

Appendix N: Kyle Killebrew Events and Facebook

Appendix O: Sasha Farmer Just Sold Card

If you are interested in knowing how the Rule family and I developed a plan to incite activity on their Pavilions at Pantops home, resulting in a sale in under 3 weeks- give me a call!

In the past year, over 50% of the homes sold by the Sasha Farmer Team were sold in 45 days or less. If you are SERIOUS about selling your home, please call me for a professional pricing and marketing consultation today. I would love to hear from you!

SASHA FARMER TEAM
REAL ESTATE

SASHA FARMER
OWNER, SASHA FARMER TEAM
VICE PRESIDENT, MONTAGUE, MILLER & CO. REALTORS®

(434) 260-1435
sasha@sashafarmer.com
charlottesville365.com

Montague Miller & Co.
REALTORS®
245 RIDGE-MCINTIRE ROAD, SUITE 1
CHARLOTTESVILLE, VA, 22903

Appendix P: Leslie McDonnell Past Client Postcard

Appendix Q: Alyce and Seth Dailey Housewarming Party Invitation

Appendix R1: Leslie McDonnell Housewarming Party

HOUSEWARMING PARTY!

Our Gift For Your New Home...

A Housewarming Party!!!

Now that you have had time to unpack your new home,
it is time to share it with your friends, family,
and new neighbors too!

The Leslie McDonnell Team would like to
help you throw a House Warming Party at your home
for 20 friends and family members.

We'll send the invitations (if you like) and provide
catering services with paper goods included.
All you need to do is choose from one of the
enclosed menus, give us your guest list and the
party date. We'll take care of all the details!

Call or email Leslie to take advantage
of this special offer.

The Leslie McDonnell Team
Re/Max Suburban
1344 S Milwaukee Ave., Libertyville
847-367-5861
Leslie@ListingsByLeslie.com
www.ListingsByLeslie.com

Appendix R2: Leslie McDonnell Housewarming Party

Catered
PRODUCTIONS

LIGHT & LIVELY LUNCH MENU

MENU #1

***Petite Croissant Sandwich Tray—(2 Per Person)**
Consisting of Fresh Roasted Turkey, Roast Beef, Honey Ham and Tuna Salad topped with Lettuce and Cheese garnished with Kale and French Cornichons with Mayo and Dijon on the side
***Fresh Fruit Arrangement with All Fresh Fruits of the Season**
***Choice of Three (3) of the following Gourmet Salads:**
Vegetable Spaghetti; Seafood Pasta; Rainbow Tortellini; Fettuccini Parmesan; Bowtie Pesto; Japanese Chicken; Southwestern Pasta **OR** Broccoli Cashew
***Also Included with your menu:**
Assorted Homemade Cookies

MENU #2

***Assorted Pretzel Roll Sandwiches—(2 Per Person)**
Consisting of Fresh Roasted Turkey, Roast Beef, Honey Ham and Tuna Salad topped with Lettuce and Cheese garnished with Kale and French Cornichons with Mayo and Dijon on the side
***Fresh Fruit Arrangement with All Fresh Fruits of the Season**
***Choice of Three (3) of the following Gourmet Salads:**
Vegetable Spaghetti; Seafood Pasta; Rainbow Tortellini; Fettuccini Parmesan; Bowtie Pesto; Japanese Chicken; Southwestern Pasta **OR** Broccoli Cashew
***Also Included with your menu:**
Assorted Homemade Cookies

MENU #3

***Assorted Whole Wheat Wraps**
Consisting of Fried Chicken, Turkey & Bacon and Roast Beef prepared on a Variety of Spinach, Tomato and Whole Wheat Tortillas with Mayo and Dijon on the side
***Fresh Fruit Arrangement with All Fresh Fruits of the Season**
***Choice of Three (3) of the following Gourmet Salads:**
Vegetable Spaghetti; Seafood Pasta; Rainbow Tortellini; Fettuccini Parmesan; Bowtie Pesto; Japanese Chicken; Southwestern Pasta **OR** Broccoli Cashew
***Also Included with your menu:**
Assorted Homemade Cookies

All Above Menus Include Disposable Caterware and Serving Utensils

Appendix R3: Leslie McDonnell Housewarming Party

REFRESHMENTS PROVIDED COURTESY OF
THE LESLIE MCDONNELL TEAM

MAKING TRANSITIONS EASY
WE WOULD LOVE TO HELP YOU
BUY OR SELL YOUR NEXT HOME!

847-367-5861
WWW.LISTINGSBYLESLIE.COM

Appendix S1: Sasha Farmer Branded Relocation Guide

HISTORY

MONTICELLO

Charlottesville's top history site. Home of Thomas Jefferson, this house is depicted on the reverse side of the nickel and draws nearly half a million visitors each year. Even if you've already toured the house, the grounds offer impressive gardens and commanding views.

Entrance fee: $24 adults ($17 Nov-Feb); $16 children 12-18 from May 27-Sept2; $8 children 6-11; children under 6 free. Tours conducted 9am-5pm every day of the year except Christmas. Tips: Arrive when it's not crowded or order advance tickets online. Summer is busiest; September and spring are sublime. Local residents who bring out-of town guests get in free. 434-984-9822

UVA GROUNDS

Widely considered the most beautiful college campus in the world. Designed by Thomas Jefferson as the heart of his so-called "Academical Village," the Lawn's centerpiece is the Rotunda. The man himself lived to see it open in the summer of 1825. Seventy years later, the Rotunda burned to its brick shell, then was "restored by architect Stanford White, and restored again to Jefferson's essential design in time for the American Bicentennial in 1976. Free tours of the Rotunda and Lawn include a peek at Edgar Allan Poe's room, #13 of course. The tours meet daily (except during the winter when students are on vacation and the first of May until after graduation) at 10 and 11am, and 2, 3, and 4pm inside the main entrance of the Rotunda. 434-924-1019 Make sure to stop by The Corner- an enclave of lively shops, bars and restaurants surrounding the university!

THE DOWNTOWN MALL

One of the few pedestrian malls in America that actually works, it's the commercial and artistic hub of the city. A nine-block stretch of bricks with over 60 restaurants and lots of shopping, it's the place to see and be seen. The nTellos Wireless Pavilion (434-245-4910) at the Mall's East End plays host to all sorts of musical entertainment, from BB King to Willie Nelson, to ZZ Top, to Sheryl Crow and local acts who perform at Fridays after 5.

Walking Tours of downtown are offered by the Albemarle Charlottesville Historical Society- call 434-296-1492 for information

MONTPELIER

A 40-minute drive north of Charlottesville in Orange County, James Madison's home re-opened in 2008, after a five year effort to restore the home to its original 19th Century conditions. To learn more about this Fourth President and "Father of the Constitution," there are mansion tours between 10am and 4pm during the summer (winter hours are abbreviated between Nov. and March). Open Tuesday through Sunday, 9:30-5:30pm, except Thanksgiving and Christmas. Adults $18, kids 6-14 $7, kids under 6 are free. 540-672-2728

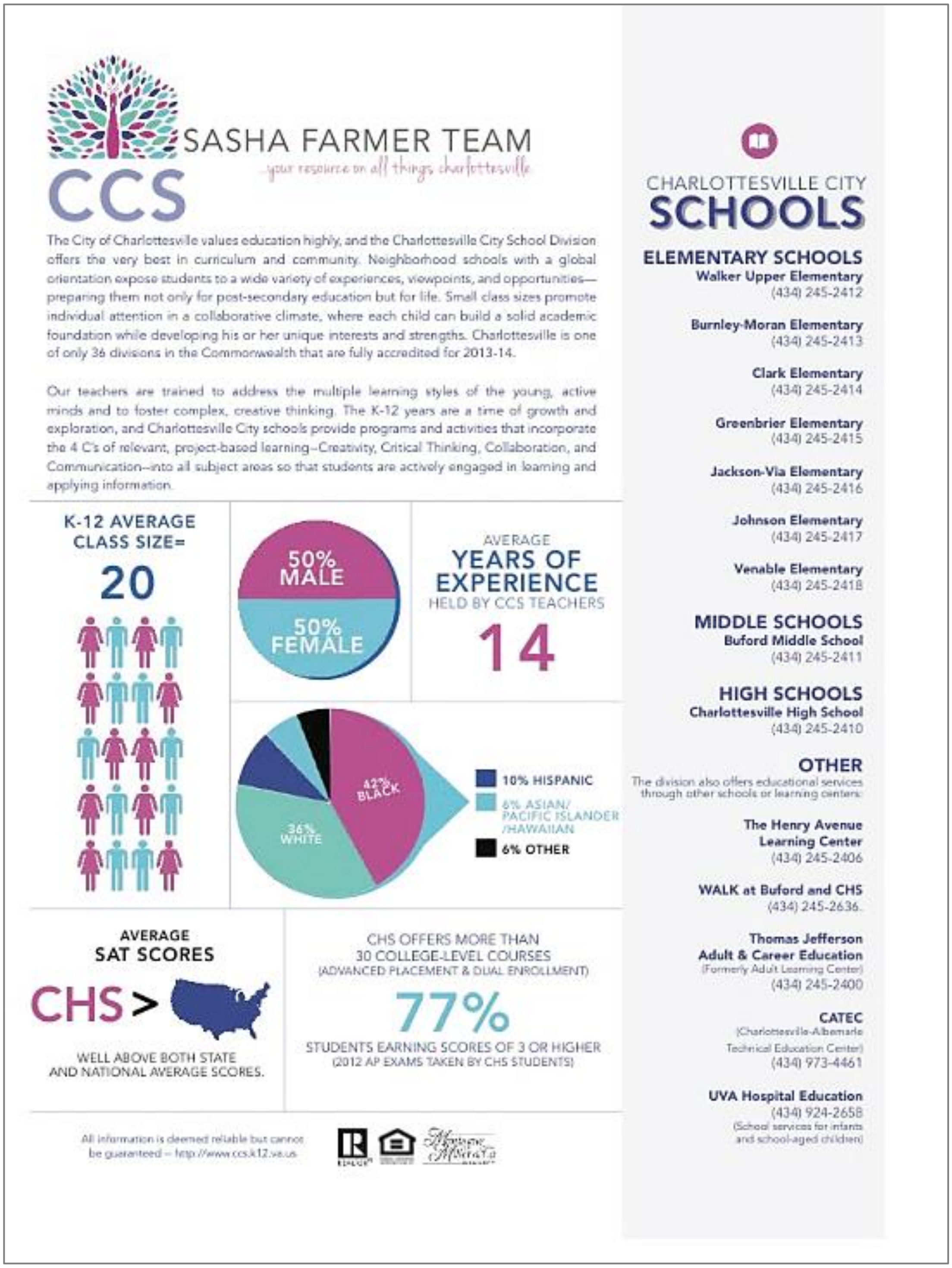
ASH LAWN-HIGHLAND

Located anywhere else in America, the home of President James Monroe would be a town's huge claim to fame, but standing here in the shadow of Monticello (and Montpelier), it's overshadowed. But as fans of foreign relations doctrines can attest, the "Era of Good Feelings" president was an important one. Tours 9am-6pm April-October and 11am-5pm November-March. $14 adults, $8 kids ages 6-11. Locals get in for $8, or free with full paying nonresidents. 434-293-8000

MICHIE TAVERN

An actual old tavern that dates from the 1700s, this building was moved 17 miles from Earlysville around the time Monticello re-opened in the 1920s and offers a traditional Southern fried chicken lunch served by staff in Colonial garb. Museum is open 9am-5pm daily with free tours for locals (lunch served 11:15am-3:30pm April-October, 11:30am-3pm November-March). Located just this side of Monticello on Rt. 54. 434-977-1234

Appendix S2: Sasha Farmer Branded Relocation Guide



SASHA FARMER TEAM

your resource on all things charlottesville

CCS

The City of Charlottesville values education highly, and the Charlottesville City School Division offers the very best in curriculum and community. Neighborhood schools with a global orientation expose students to a wide variety of experiences, viewpoints, and opportunities—preparing them not only for post-secondary education but for life. Small class sizes promote individual attention in a collaborative climate, where each child can build a solid academic foundation while developing his or her unique interests and strengths. Charlottesville is one of only 36 divisions in the Commonwealth that are fully accredited for 2013-14.

Our teachers are trained to address the multiple learning styles of the young, active minds and to foster complex, creative thinking. The K-12 years are a time of growth and exploration, and Charlottesville City schools provide programs and activities that incorporate the 4 C's of relevant, project-based learning--Creativity, Critical Thinking, Collaboration, and Communication--into all subject areas so that students are actively engaged in learning and applying information.

K-12 AVERAGE CLASS SIZE= 20

50% MALE
50% FEMALE

AVERAGE YEARS OF EXPERIENCE HELD BY CCS TEACHERS 14

42% BLACK
36% WHITE
10% HISPANIC
6% ASIAN/PACIFIC ISLANDER/HAWAIIAN
6% OTHER

AVERAGE SAT SCORES

CHS >

WELL ABOVE BOTH STATE AND NATIONAL AVERAGE SCORES.

CHS OFFERS MORE THAN 30 COLLEGE-LEVEL COURSES (ADVANCED PLACEMENT & DUAL ENROLLMENT)

77%

STUDENTS EARNING SCORES OF 3 OR HIGHER (2012 AP EXAMS TAKEN BY CHS STUDENTS)

All information is deemed reliable but cannot be guaranteed – http://www.ccs.k12.va.us

CHARLOTTESVILLE CITY SCHOOLS

ELEMENTARY SCHOOLS

Walker Upper Elementary
(434) 245-2412

Burnley-Moran Elementary
(434) 245-2413

Clark Elementary
(434) 245-2414

Greenbrier Elementary
(434) 245-2415

Jackson-Via Elementary
(434) 245-2416

Johnson Elementary
(434) 245-2417

Venable Elementary
(434) 245-2418

MIDDLE SCHOOLS

Buford Middle School
(434) 245-2411

HIGH SCHOOLS

Charlottesville High School
(434) 245-2410

OTHER

The division also offers educational services through other schools or learning centers:

The Henry Avenue Learning Center
(434) 245-2406

WALK at Buford and CHS
(434) 245-2636

Thomas Jefferson Adult & Career Education
(Formerly Adult Learning Center)
(434) 245-2400

CATEC
(Charlottesville-Albemarle Technical Education Center)
(434) 973-4461

UVA Hospital Education
(434) 924-2658
(School services for infants and school-aged children)

Appendix S3: Sasha Farmer Branded Relocation Guide

WINERIES

- Afton Mountain Vineyards
- Blenheim Vineyards
- DelFosse Vineyards & Winery
- Early Mountain Vineyards
- Glass House Winery
- Jefferson Vineyards
- Keswick Vineyards
- King Family Vineyards
- Mountain Voce Vineyards & Wne Garden
- Pippin Hill Farm Charlottesville Winery
- Pollak Vineyard
- Prince Michel Vineyards
- Trump Winery
- Veritas Winery

BREWERIES & CIDERIES

- Albemarle Cider Works
- Blue Mountain Brewery
- Castile Hill Cider
- Champian Brewing Company
- Devils Backbone Brewery
- James River Brewing
- South Street Brewery
- Starr Hill Brewery
- Wild Wolf Brewing Company

POPULAR CVILLE EVENTS

(a small sample to get you started!)

- Albemarle County Fair
- Ash Lawn Opera Festival
- Charlottesville Restaurant Week
- Festival of the Photograph
- UVA Football games
- Foxfield Steeplechase Races (The fall Foxfield horse races are more family-friendly)
- Women's Four Miler
- The Spirit Walk
- Trick or Treat on the UVA Lawn
- The Montpelier Hunt Races
- First Night Virginia (New Years Eve on the Downtown Mall)
- Virginia Film Festival
- Crozet Arts and Crafts Festival
- Virginia Festival of the Book
- Charlottesville Marathon and Half Marathon
- Tom Tom Founders Festival
- Annual Dogwood Festival
- Fridays after 5

THE CITY MARKET

Charlottesville's oldest open air market. A must visit. It is truly a taste of Charlottesville. They offer a little bit of everything. Fresh fruits and veggies when in season, handmade gifts, home made baked goods, fresh roasted coffee, dough-nuts, organic bagels, authentic Mexican foods made on location, fresh artisan breads, and much more.
Saturdays- 8am-1pm. Located in between Water Street and South Street.

SHOPPING

SHOPS AT STONEFIELD
(Pier 1 Imports, Brooks Brothers, Trader Joe's, Regal movie theater among other shops and restaurants)

THE CORNER
(Mincers the Student Book Store, Ragged Mountain Running Shop and other local boutiques)

THE DOWNTOWN MALL
(lots of locally owned shops and restaurants

BARRACKS ROAD SHOPPING CENTER
(Old Navy, Harris Teeter, Kroger, Ulta, Bed Bath and Beyond, Ann Taylor, Banana Republic and more!)

CHARLOTTESVILLE FASHION SQUARE MALL
Belk, JCPenney, Sears, Victoria's Secret, Eddie Bauer, Kay Jewelers and much more!)

HOLLYMEAD TOWN CENTER
(Target, Kohl's, PetSmart, GameStop, Harris Teeter, Bonefish Grill)

Appendix T: Lead Products and Services

BombBomb http://www.bombbomb.com	Email marketing platform that allows you to create, send, and track results of traditional emails and video emails
BoomTown http://boomtownroi.com	CRM platform designed for brokers or team leaders who are focused on generating a high volume of leads while keeping total accountability over their agents and the leads assigned to them
Contactually https://www.contactually.com	Relationship marketing platform that organizes and updates your contact database, tracks all of your communications across email, social media and phone, and sends automatic follow-up reminders to prompt you to reengage important people with whom you haven't spoken recently
Every Door Direct Mail https://eddm.usps.com	USPS service that delivers your printed piece to every address within the specific area that you want to target, with no names or addresses needed
Facebook Ads Help Video http://on.fb.me/19UuMSU	Informational video that explains the four types of bids to help you choose which one is best in relation to your Facebook advertising objective
Google AdWords http://adwords.google.com	Online PPC advertising service that places advertising copy at the top of, bottom of, or beside the list of results Google displays for a particular search query
Google Canned Responses http://bit.ly/KBzA3v	Instructions for how to use a Lab that allows you to insert pre-formatted content you create into your messages
Happy Grasshopper https://happygrasshopper.com	Service that sends short (under 400 words) emails on behalf of agents to their clients on three-week cycles, highlighting interesting,

	quirky content that is intended to promote interaction and sharing
HouseLogic REALTOR® Content Resource http://members.houselogic.com	REALTOR® benefit that provides access to free homeownership articles and tools to compile and share the articles with clients
Housing Trends eNewsletter http://marketing.realtor.com/housing-trends-newsletter.php	Free marketing system that helps you keep in touch with Internet leads through a monthly newsletter that includes statistics, sales trends, and local facts
HubSpot http://www.hubspot.com	Inbound marketing software platform that includes features for social media marketing, email marketing, content management, web analytics, and search engine optimization
Keeping Current Matters http://www.keepingcurrentmatters.com	Paid content service that provides a new briefing each month in various formats—video and audio, PDF for use in presentations, PowerPoint version to customize, JPEG of each slide for sharing online, and printed transcript
kvCore http://www.insiderealestate.com/	Real estate lead generation service that includes a website, CRM, phone system, mobile platform, email and communications portal, and document storage and e-signatures
Outlook QuickParts http://www.outlook-apps.com/autotext-in-outlook-2013	Instructions for how to create and store frequently used text, pictures, or other email message parts so that you can reuse them
Prime Seller Leads http://www.primesellerleads.com	Lead generation tool that provides proprietary landing pages that have been created for the purpose of generating seller leads
Real Market Reports http://www.realmarketreports.com	Paid service that provides statistical analysis of local markets, including active, pending, expired, and sold listings for the last six months as well as days on market, average

	prices, pending ratios, list-to-sale ratios, and absorption rates
Real Pro http://www.realprosystems.com	Real estate websites and Internet marketing systems, including stealth websites, automated follow-up systems, system migration services, paid lead generation programs, search engine optimization, and custom content creation
Realtor.com: Connection^{SM} for Co-Brokerage http://marketing.realtor.com/connection-co-brokerage.php	Paid lead generation product that is sold in areas, based on zip codes, and priced according to the specific area
Realtor.com: FiveStreet http://marketing.realtor.com/fivestreet.php	Lead response and routing system that automates the follow-up process by consolidating leads from any source and then responding to, researching, and routing them
Realtor.com: Showcase^{SM} Listing Enhancements http://marketing.realtor.com/showcase-listing-enhancements.php	Paid product that inserts your information next to your listings with branding and a toll free number and allows you to post open houses, virtual tours, videos, and up to 36 photos
SmartTargeting Powered by SmartZip http://www.smartzip.com	Predictive marketing platform that uses big data and scientific analysis to predict which homeowners are most likely to sell their homes and provides mailers, lead capture sites, online advertising, and email nurturing
Top Producer https://www.topproducer.com	Marketing and lead generation systems for real estate professionals, offering contact management, lead generation, lead incubation, postcard marketing and web marketing solutions
Wise Agent https://www.thewiseagent.com	CRM system designed for real estate agents that includes features such as contact management, transaction management, marketing tools, and lead tracking

Zurple http://zurple.com	Online marketing platform for residential real estate professionals that uses data-driven, proprietary analytics to identify leads and the right time to approach them

Notes

Notes

Notes

Find RRC on the following social media sites:

www.facebook.com/ThisIsRRC
www.facebook.com/groups/WeAreCRS

www.instagram.com/ThisIsRRC

www.twitter.com/ThisIsRRC

Residential Real Estate Council

Residential Real Estate Council

RESIDENTIAL REAL ESTATE COUNCIL

430 N. Michigan Ave. | Chicago, IL 60611