

## Seller Lead Checklist

The goal when following your checklist is to immediately respond to all leads, leveraging technology while using links to drive the consumer back to your website to:

1. Eliminate the lead from having to go back online to another site and
2. Engage leads so you can gather additional information based on their behavior

We'll implement four strategies to engage new and returning seller leads:

1. [Listing Alerts](#)
2. [Mini Comparative Market Analysis \(CMA\)](#)
3. [Send Relevant Listings](#)
4. [Assigning Lead to a Campaign](#)

Use the email scripts and action steps below to respond to each new lead immediately.

### Day 1: Immediately Sent Intro Email

- ✓ Send Intro/Welcome Email  
Note: For Housevalues.com and external leads, the system welcome email is not sent automatically because the lead has not registered on your website. Leads that register on your website's Sell page will automatically receive the [Welcome email](#).
- ✓ ACTION: Change status to retry

#### Day 1: Intro Email

Subject: Value for your <CITY> Home

Thanks again for contacting me through <House Values or website URL>. The automated value you received is an estimate and is from public information. I am in the process of gathering the information you requested. In the meantime, feel free to view my website to find all the current MLS listings in the area at <WEBSITE URL>. You can follow and save listings as they come on the market, as well as track home values in your area.

I'll be in touch shortly to provide you a more accurate value of your home in addition to other properties near you with similar characteristics you can view and compare.

Thanks!

### Day 1: Follow Up

- ✓ ACTION: [Send mini CMA](#)
  - Update the default text on the CMA with the template below and send
- ✓ ACTION: Change status to retry and set reminder for 2 days

### Day 1 Email: Custom Mini CMA

Subject: Value for your <CITY> home

Thanks again for the inquiry about the value of your home. As I mentioned earlier, the initial value is an estimate from public records. I have put together a home market evaluation for you. Below you will see a price range I have estimated for your home, which was determined by several factors including: number of bedrooms, bathrooms, and square footage of comparable homes in your neighborhood. Have you had any recent renovations or significant upgrades to your home property? If so, let me know as that will increase your value.

Please note that this is not an appraisal, only an estimate of the current market value of your home, sight unseen. When I visit your home, I can give you a more precise evaluation based on any home improvements you have made, special features, the condition of your home, etc.

One of my specialties is helping people get their home ready for sale, and getting top dollar for their home.

Thanks again and please feel free to come back to my site and visit as often as you like. You have full access to real time homes on the market as well as market conditions you can view at any time. I look forward to working with you further.

### Day 3

- ✓ Have they been back to your website?
  - If yes, ACTION: Change status to WARM and follow up accordingly.
  - If no, send day 3 email with similar listings to their home
- ✓ ACTION: Set reminder for 2 days

### Day 3 Email: Similar Listings

Subject: Similar listings to your home on <STREET>

<Day of the week you sent email 1>, I sent you a home valuation for your property. Thanks again for using my website to gather real estate information. You have full access to real time homes on the market as well as market conditions you can view at any time.

Here are a few homes currently on the market which are similar to your home for you to compare. In addition, I can provide you with new and updated listings weekly that are similar to keep you up to date with homes as they become available on the market.

[<Link to recommended listings on your website>](#)

Are you also curious about a new home in a nearby area? Need more space or looking to downsize?

If so, what are some must have's in your next home? An open floor plan? Quick access to the freeway? Near schools or parks? Let me know and I'll make sure to include those features in the properties I send.

Thanks again, I'm looking forward to keeping you up-to-date!

## Day 5

- ✓ Have they been back to your website?
  - If yes, change status to WARM and use the Consumer Behavior Triggers below to help guide your next step.
  - If no, send day 5 email below
- ✓ ACTION: Set up a listing alert for pending and under contract properties
- ✓ ACTION: Set up reminder for 2 days

### Day 5 Email: Listing Alert

Subject: from <NAME> at from <CITY, Brokerage>

I've set you up to receive listings in your area that are pending or have gone under contract. This will give you an idea of the activity in your market, and comparable home prices. You should receive these property updates twice a week. If that's too much, or if you want to receive them more frequently, just let me know.

## Day 7

- ✓ Have they been back to your website?
  - If yes, change status to WARM
  - If no, send Intro Video email below and [add them to the following campaigns](#)
- ✓ ACTION: Add lead to Monthly Newsletter Campaign
- ✓ ACTION: Add lead to Long Term Seller Campaign

### Day 7 Email: Intro Video



Subject: from <NAME> at from <CITY, Brokerage>

I want to thank you again for registering on my website last week. My site provides you with access to the most recent real estate information on the market such as homes for sale, inventory trends, school and neighborhood details as well as home valuation estimates.

I want to keep you up-to-date with your real estate needs and I have included a VIDEO that puts a name to a face so you are more familiar with the person who is providing the information. Regardless if you are relocating, currently living in the area, a first-time homebuyer, looking to sell and downsize, or simply curious about real estate, my website and I can provide you with the best information to assist you in your search.

Thanks again and looking forward to connecting!

<INSERT VIDEO>

 <h3>Pro Tips</h3> <ul style="list-style-type: none"> <li>• Leverage your <a href="#">status options</a> to stay organized</li> <li>• Utilize social media for additional insights (Facebook, LinkedIn connections)</li> <li>• Once a lead responds by replying or visiting your site, identify behavior triggers (see below) and provide additional relevant information using appropriate email scripts.</li> </ul>	 <h3>Lead Status Definitions</h3> <p><b>New</b> - no action has taken place  <b>Retry</b> - action has taken place, attempting to get back to website  <b>Warm</b> - lead has returned to website within the last 14 days  <b>Cold</b> - lead has not returned to website within the last 14 days  <b>Pending</b> - lead is under contract  <b>Sold</b> - lead has closed  <b>Trash</b> - lead has incorrect contact information</p>
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## Top Consumer Behavior Triggers

Below are key behavior triggers to watch for in your system. Once you identify the behavior, you can create an action plan to follow up with leads. Example follow-up actions are listed below for each behavior.

### 1. Viewed Homes

The homes consumers are viewing on your website says a lot about the home they are looking for or possibly what their current home is worth. **Identify trends or patterns** such as:

- Type (condo/single family/short sales/foreclosure)
- Neighborhoods
- Price range
- Features (view/vaulted ceilings, pool, etc.)
- Number of bedrooms/baths

**Mental checklist:** Is there anything that stands out from the homes that were viewed? Any common features? Have you showed or visited any of the homes that were viewed? Once you have identified a pattern, you can provide relevant content.

**Example:** The lead has viewed homes in a very family friendly neighborhood with 3-4 bedrooms.

#### Email Response:

Subject: <LEAD NAME:> Thought you might like these homes

I noticed you were viewing <property X on street name>. That is a fantastic neighborhood with great schools! I'm very familiar with the community and thought you may find the following property interesting.

<[Link to similar property listing on your website](#)>

There is also great neighborhood data on my website if you'd like to check it out.

<Link to Market Insider tab of your website with relevant Zip Code>

Let me know if you are ready to view any properties or if you are just browsing, enjoy!

This type of response provides value, gets them back on your website and lets the consumer know you are an expert without being pushy. Remember to set a reminder to check back in a week so you can stay top of mind.

## 2. Saved Homes


Saved homes are very similar to viewed homes only the consumer may be slightly further along in the buying process since they are actually saving favorites. Same rule applies to this group, **identify trends or patterns and respond accordingly.**

### Actions:

- Pull up the home in the MLS
  - Collect as much information on that home as possible and try to obtain information that is not available to the consumer.
- Contact the listing agent to gather more information not listed in the MLS.
- Drive by the home
  - Take a few street view pics and/or a quick 30-45 second video.

When you contact the consumer with this information, now is also a great time to ask about their timeline – are they just looking or on a quick timeline. Remember, this is your agent courtship. Don't come across too strong or you will scare them away. This stage is about providing information beyond what they can see online and building trust that you are an abundant source of information.

## 3. Request More Info on a Home

 Warning: Don't just call and ask if they want to go see the home!

### Action:

- Use the MLS and listing agent to help you gather more information on the listing.
- Drive by the property and take video or additional photos.

### **Resources:**

Visit the Training and Support Center anytime to search for support topics: [Learn.marketleader.com](https://www.marketleader.com/learn)

 *training & support*

[Return to MarketLeader.com >](#)

Our customer care team is standing by! Call 877-450-0088 or email [support@marketleader.com](mailto:support@marketleader.com).