Lead Engagement Process

ALM (Appointment, Location, Motivation) Framework for Every First Call:

******Goal is to keep the call short and schedule a face-to-face meeting either the same day or next day (ZOOM, Facetime, Duo, FB Messenger Video Chat are also great ways to have virtual Face to Face meetings)***

1. Hi (use their name if you received it) my name is Randy Barrows with EXIT Landmark Realty. I understand you want to view 123 Main Street. What time today or tomorrow works for you?
2. "ok great, now that we have a time that works for you let me confirm/schedule with the seller and I will call you right back. You will also get all my contact information when we hang up."
3. By the way, while I have you on the phone, are there any other homes you would like to see in that same area that I can schedule as well?
4. What interested you about this/these homes?
5. *Bonus – Suggest additional homes in the area that fit their criteria.
6. Close call, "ok great, I am looking forward toward meeting you today at 2:00 at 123 Main Street. I will send you my mobile business card as soon as we hang up."

After the First Call:

1. Send Mobile Business Card and Digital Buyer Presentation/Guide using the EXIT Realty Connect App
2. Look up Property in the MLS and Schedule Showings
    a. We recommend you schedule two to three listings, the one they requested and one or two similar listings.
3. If the listing they want to see is not available, schedule similar properties then call the lead to let them know you were unable to schedule the home they wanted to see but you are waiting to hear back from the seller for additional information about the status of the home and have scheduled a few similar homes and look forward to meeting them. You can call the listing agent to find out if they are still allowing showings and taking back up offers.
    a. "Hello (lead name) I was unable to schedule 123 Main St and have reached out to the Seller to get more information about the status of the home, in the meantime I have scheduled 1234 First St and will meet you there at 2:00"

First Face-to-Face Meeting with Lead:

1. Present them with a physical information packet (item of value). You can work with your dirty dozen to help pay for folders or buyer guides from Theresa Bader tbader@badermarketing.com. There are also some EXIT Landmark folders in each office.
    a. Buffini Purchasing Pathway Buyer Guide (exitlandmarkagents.com)
    b. MAR Understanding Brokerage Relationships
    c. All-In One Home Inspection Flyer or Inspection Company of Choice
    d. Quality Service Moving or Moving Company of Choice
    e. At least two Lenders - Cardinal Financial Lender Flyer **(OPCITY LEADS: IF AND ONLY IF THEY HAVE CHOSEN NOT TO WORK WITH THE OPCITY PROVIDED LENDER)**.
    f. 1 – 2 Title Companies: Monique Banks with Four Seasons Title (844) 889-8826
2. After you have built rapport:
    a. Explain benefits of buyer agency and present them with the MAR Exclusive Buyer-Tenant Representation Agreement. You can use the MAR Understanding Brokerage Relationships flyer to explain.

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b. Using the Buffini Purchasing Pathway Buyer Guide explain the importance of obtaining a pre-qualification letter from their lender, which will allow you to submit their offer.
c. Zillow My Agent/Friend Request
    i. Right now, I am going to send you a Zillow Friend request via email. This is going to connect us on the backend of Zillow and make it easier for me to assist you by locating properties that meet your needs. It will also allow me to send your properties via text. This is not a binding contract or anything like that it simply makes it easier for us to communicate through the Zillow platform.
d. This is a good time to let them know you can set them up on a listing alert. Attempt to get basic search criteria such as: Location, Bedrooms, Bathrooms, and any other must have features.

After the Face-to-Face Meeting

1. Add the lead/contact to your CRM
    a. Examples: Market Leader CRM, Onjax/Pure Agent CRM, or Chime are all great CRMs. **DO NOT USE Bright MLS as your CRM as it does not easily track communication between you and your client.**
2. Get the lead/contact set up on listing alerts in your CRM and a monthly drip campaign.
    a. This will help you gauge the lead's level of engagement since you can see if they are opening listings and email.
    b. Follow the Website Lead Checklist (Leads Resource Center) after the first meeting. If unable to get a meeting, follow the Day1 checklist.

Zillow Scripts

1. Zillow Friend Request (Best face to face or at least over the phone)
    a. I am going to send you a Zillow Fried request via email. This is going to connect us on the backend of Zillow and make it easier for me to assist you by locating properties that meet your needs. It is not a binding contract or anything like that.
2. Customer Satisfaction Survey (Make it your own…)
    a. Throughout this process, Zillow may send you a couple quick satisfaction surveys very similar to Uber where you simply click a smiley face. I pride myself in five-star service and want to make sure I am doing everything possible to meet your needs and **earn** a five-star ranking from you. If there is ever anything I can do to better meet your needs, please let me know. It would really mean the world to me if you would respond to those surveys.