

# 1. THE LEAD CONVERSION FOLLOW UP PLAN CHECKLIST

Use the checklist below to guide you through the Lead Conversion Follow Up plan. Click the box to check a task once you've completed it. Click on the bold, capitalized email titles to navigate to its corresponding email script.

## DAY 1

- Call the lead at least 3 times throughout the day - if they don't pick up the first or second call.
- Text the lead if they don't answer your calls.
- Input the lead contract information into your CRM.
- Research the lead's social media profiles like Facebook, Instagram, Twitter, and LinkedIn.
- Send **EMAIL 1: INTRODUCTION.**
- Send **EMAIL 2: CALL ATTEMPT.**
- Categorize the lead into an "level of interest" group - Tire Kicker, Lead, or Prospect.

## DAY 2

- Call the lead 3 times throughout the day if they did not respond during Day 1 - if they don't pick up the first or second call.
- Text the lead if they don't answer your calls.
- Send the lead a friend request on the social media profiles you found.
- Send **EMAIL 3: SPECIFIC PROPERTY.**
- Send **EMAIL 4: DID YOU RECEIVE?** or **EMAIL 5: CONFIRM CONTACT INFO.**

## DAY 3

- Call the lead for first follow-up to discuss listing alerts and ask if they received suggested properties email, or leave a message.
- Send **EMAIL 6: LISTING ALERTS BENEFITS.**
- Send **EMAIL 7: NEIGHBORHOOD DATA LINK BASED ON BEHAVIOR.**
- Set Up additional listing alerts and confirm enrollment into alerts with lead.
- Adjust existing listing alerts and fine tune them.
- Send **EMAIL 8: VERIFY LISTING ALERTS** or **EMAIL 9: LISTING ALERTS ADJUSTMENT.**

## DAY 4 - 7

- Send **EMAIL 10: INTEREST IN FORECLOSURES.**
- Send **EMAIL 11: SPECIFIC FORECLOSURE LISTING** (if lead confirms EMAIL 10) or **EMAIL 12: FEEDBACK ON LISTINGS** (if lead declines EMAIL 10).
- Send **EMAIL 13: SHARE TOP LISTINGS WEBSITE PAGE LINK.**
- Send **EMAIL 14: INVESTMENT OR PERSONAL** or **EMAIL 15: DAILY LISTINGS UPDATES CHECK IN.**

## DAY 8 - 9

- Send **EMAIL 16: SERVICES EXPLANATION.**
- Send **EMAIL 17: WHY TO BUY NOW** or **EMAIL 18: SPAM CHECK.**
- Call the lead for second follow-up to discuss – pick a call to action to discuss or leave a message.

## DAY 10

- Call the lead for third follow-up to discuss close out.
- Send **EMAIL 19: CLOSE OUT** or **EMAIL 20: SHORT CLOSE OUT.**
- Assign lead to appropriate status. NOTE: Don't delete leads if they aren't interested, mark as "Inactive".
- Assign lead to appropriate email campaign based on past behavior.



## 2. EMAIL SCRIPTS

Insert your information and replace the variables in the email script templates below. Variables are designated by all capitalization labels between two brackets. Example: {WEBSITE}

**Pro Tip:** Use these email scripts along with automation to spark conversations with your leads by automatically sending them timely personalized emails and texts based on their interactions on your website. [Learn more >>>](#)

### A. EMAIL SCRIPT TEMPLATES

#### EMAIL 1: INTRODUCTION

SUBJECT: Welcome to My Website

Welcome to my website, {WEBSITE}, I appreciate you for registering with me. By registering, you have unlocked access to all the homes in {MARKET} that are listed with all the different companies. Just so you know, I am here to serve you and answer any questions you might have - so let me know if you need anything. Hope to connect with you soon.

#### EMAIL 2: CALL ATTEMPT

SUBJECT: I Tried to Contact You

Hello! I tried to call you a few times today but got your voicemail instead. I just wanted to introduce myself and see what it is you are looking for, so I can better assist you and help you get the information you're looking for. Do you prefer to communicate through text or email? Let me know. I look forward to helping you with your home search or answering your questions.

#### EMAIL 3: SPECIFIC PROPERTY

SUBJECT: Property You Might Like

I noticed you were checking out some {# OF BEDS}, {# OF BATHS}, THE LEAD CONVERSION FOLLOW UP PLAN homes in the {NEIGHBORHOOD} in the {PRICE RANGE}... I have a new one coming on the market soon, and thought you might like it, let me know if you are interested.

#### EMAIL 4: DID YOU RECEIVE?

SUBJECT: Just Wanted to Touch Base Regarding the Homes I Sent

Just wanted to touch base and see what you thought of the homes I sent. Did you get them? I was wondering if you like any of them. We can check them out in person if you do. Just let me know!

**EMAIL 5: CONFIRM CONTACT INFO**

SUBJECT: Correct Information?

Just wanted to check in with you to see how you are doing. Is the home information that I am sending you correct and relevant to what you are looking for? Please let me know because I want to make sure that I am sending you homes that are of interest. Let me know if they are!

**EMAIL 6: LISTING ALERTS BENEFITS**

SUBJECT: Why Are Listing Alerts So Important?

I noticed that you haven't signed up for home alerts yet. In an effort to notify you the instant your dream home hits the market, I can provide you with daily, weekly, or bi-weekly email updates on homes for sale that match your criteria.

Let me know if you would like me to set it up, or you can do it yourself at my website, {WEBSITE}. Log into your account, click on your name (at the top) and then beneath "My Home Alerts" fill out the "Create a New Alert" section.

**EMAIL 7: NEIGHBORHOOD DATA LINK BASED ON BEHAVIOR**

SUBJECT: Find More Active Listings in {NEIGHBORHOOD}

I noticed you were on my website, {WEBSITE}, searching for homes in {NEIGHBORHOOD}. If you're interested in checking out homes in this area, I recommend visiting this link: {NEIGHBORHOOD LINK} and bookmarking it so you can check it quickly. It will show you all the active listings in {NEIGHBORHOOD} as soon as they go on market. If you find one, let me know and I can set up a showing for you.

**EMAIL 8: VERIFY LISTING ALERTS**

SUBJECT: Please Verify Your Receipt of Listing Alerts For {MARKET} Real Estate

I just wanted to send a quick note ensuring you were receiving my e-mail alerts from {WEBSITE}. If you are getting them, but they are really not what you are looking for, tell me how I should change the criteria to give you more of what you are looking for.

Remember, if you have any questions, I am here to help. I look forward to hearing from you soon.

**EMAIL 9: LISTING ALERTS ADJUSTMENT**

SUBJECT: Should I Adjust Your Listing Alerts?

What area in {MARKET} are you looking to buy your next home? Keep me posted, so I can adjust your Listing Alerts accordingly.



**EMAIL 10: INTEREST IN FORECLOSURES**

SUBJECT: Foreclosure Listings

I'm not sure if you are interested, but I know a lot of buyers nowadays want a deal, and I have access to lists of Bank Foreclosures all over {MARKET}. Let me know if you want a FREE list or if you want to learn more about foreclosure listings!

**EMAIL 11: SPECIFIC FORECLOSURE LISTING**

SUBJECT: Foreclosure Deal

I just came across a great foreclosure deal that I thought you would be interested in! Can you remind me the price range and neighborhood you're interested in? These foreclosure properties typically go off the market quickly, so please let me know as soon as you can. When would you be able to start viewing homes? Keep me posted!

**EMAIL 12: FEEDBACK ON LISTINGS**

SUBJECT: The Listings I Sent You

Do you have any comments or opinions on the listings I've been sending you? I would love your feedback, so I can update my home search parameters - in case we are not hitting the mark with the listings...Let me know!

**EMAIL 13: SHARE TOP LISTINGS WEBSITE PAGE LINK**

SUBJECT: Best Buy List

Here is a link to my Teams continually updated "Best Buy List"; updated every two weeks, {TOP LISTINGS LINK}. Are you still in the market for a new home? Now is a great time to be a buyer. As a buyer specialist, I have access to everything on the market. I would love to take you out to tour homes when you are ready. Please feel free to contact me at {PHONE #}, anytime. I look forward to hearing from you!

**EMAIL 14: INVESTMENT OR PERSONAL**

SUBJECT: Investment or Personal?

I noticed you were on my website looking at several homes... Are you looking for a primary residence or an investment property? Talk to you soon.

**EMAIL 15: DAILY LISTINGS UPDATES CHECK IN****SUBJECT:** Just Checking In...

I just wanted to check in to make sure you still want me to send you daily updates about listings in {NEIGHBORHOOD}. I don't want to bombard you with information, yet I know things change along the way and I just want to get you the best properties and right info. Please let me know if there are any "tweaks" we should make to your updates. Thanks for coming back to {WEBSITE} and I look forward to working with you!

**EMAIL 16: SERVICES EXPLANATION****SUBJECT:** Meeting Your Standards

I just wanted to touch base to see if you have any questions about the property you've been viewing. I would love to set a time to meet with you. I can share more details about the property, go through my Home Buyer's guide, share the benefits I offer, and talk about your needs and goals for a new home. I am available to show homes when you are ready! I also have access to everything on the market. Please feel free to contact me if you have any questions or need anything. I look forward to hearing from you!

**EMAIL 17: WHY TO BUY NOW****SUBJECT:** Great Time to Buy

What do all-time low interest rates really have to do with affordability in today's real estate market? Everything! Are you still wondering when the best time to buy a new home is? There will never be a better time than right now! Watch this quick video below to help understand the market and your buying power. Video: {BUYER VIDEO LINK}

**EMAIL 18: SPAM CHECK****SUBJECT:** Checking In

I hope you are doing well. I want to make sure you are receiving my listing emails because they can end up in the spam or junk folder sometimes. If you are receiving them, are they close to what you are looking for or do I need to "tweak" the search? I look forward to hearing back from you.

**EMAIL 19: CLOSE OUT****SUBJECT:** Should I Continue Sending Properties to You?

I've been sending you listings and information from {WEBSITE} but have not heard back from you. I do not want to clog up your email with unwanted material, so just let me know if you want me to continue sending you properties or if I can assist you in anyway. Thank you for using my website--hope it is helping your home search! I look forward to speaking with you when you are ready to connect.



**EMAIL 20: SHORT CLOSE OUT**

**SUBJECT:** Should I Continue to Send You Properties?

I hope you're doing well! I was just wondering, should I keep sending you daily email updates? Please let me know!

**B. ADDITIONAL EMAIL SCRIPTS**

**EMAIL 21: STILL USING MY WEBSITE**

**SUBJECT:** Home Search

Hi, it's me again, {NAME} :) I see you're still using my website, {WEBSITE}, which is great! Do you have a time frame for your move or know which neighborhoods you're interested? I can help answer any questions if you have any. Please let me know, I am here to serve and I'm more than happy to help.

**EMAIL 22: REFERRAL REQUEST**

**SUBJECT:** Anyone You Know Who Might Be Looking to Buy or Sell?

Other than yourself, do you by chance happen to know anyone who could be looking to buy or sell real estate that you might want to refer to me? I would really appreciate you for sharing their information. Keep me posted please!

**EMAIL 23: STILL SEARCHING FOR A NEW HOME?**

**SUBJECT:** Still in the Market?

I was wondering if you were still in the market for a new home. If you are, I'd love to hear from you so we can discuss your needs and wants in a home! If you have any questions at all, please do not hesitate to email or call me. Looking forward to connecting with you!

**EMAIL 24: STILL BUYING IN NEIGHBORHOOD?**

**SUBJECT:** A Quick Question for You

Are you still looking to buy a home in {NEIGHBORHOOD}? Let me know!