

STANDARD
REAL ESTATE
ONE PAGER

LEAD CALL:

When answering lead calls, remember ALM:

- Appointment: start by getting the appointment scheduled
- Location: ask questions like, "tell me more about what draws you to this location," or "What do you like about this area?"
- Motivation: ask questions like, "what led you to decide to start looking for homes?" or "tell me about why you want to purchase a home"

STAGES:

Make sure to update stage for all clients, especially:

- Spoke with client (spoke with client over the phone)
- Appointment set (first showing is booked)
- Met with client (met in person at a showing)
- Showing homes (second time out viewing homes)
- Submitting offers (once 6 month EBAC signed)
- Under contract (fully executed contract for real property in place)
- Closed (transaction is completed)

Other stages:

- Sphere (non-Zillow leads who are referral partners for you)
- Nurture (timeline for purchase is more than two months out)
- Listing agreement (ERTS is signed)
- Active listing (seller's listing is live)
- Trash (also called rejected. Use only if asked to stop all communication or if spam)

FUB:

- Work your smart lists so all are at zero
- Make sure you take good notes every time you speak with a lead, and update the stage after each communication, if necessary:
- If a client becomes unresponsive, move to the cold pond or nurture and not trash
- Don't trash leads unless they are spammers, are working with another agent AND have signed an exclusive buyer agency with that other agent, or ask you to not contact them again
- After nurturing lead for 2 months at a minimum, if still unresponsive, you can keep in your own nurture stage. If you don't want the lead anymore, you can send names to Bryce and he will reassign them to KC Flex Money Pond.

PROCESS:

1. Receive call. Remember ALM. Get people to a showing. Sign non-exclusive touring agreement.
2. After call, add appropriate tag: buyer, seller, or buyer/seller
3. Have convo about preapproval after first showings. "Are you reapproved yet? If not, let me connect you with ZHL or x lender."
4. Ask about property search
5. Ask about timeline for purchase/sale
6. Transfer lead to ZHL
7. Update stage as needed
8. Once closed, change stage to closed and enter home address and closing anniversary date

ZILLOW PREMIER UPDATES:

Go to contacts on Zillow Premier website (<https://premieragent.zillow.com/crm/inbox/contacts>) and click pop up box if one is there. Update lead status with a new note and/or update the stage if needed.