LINDA CRAFT
TEAM
REALTORS

# DAKNO DISCIPLINE
# BUYER OPPORTUNITY TIME
# Linda Craft Team Realtors
# Lead Action Plan

**Linda Craft Team Realtor's CRM, Dakno, is custom designed to help our Agents prospect more efficiently and effectively, while maintaining contact records. Success is achieved in prospecting through Active (Lead Touches) and Passive marketing (Database newsletter, email campaigns) and Agent direct marketing. Maintaining an accurate database within Dakno is each Agent's opportunity and responsibility as a member of the Firm.**

**Prospecting is a "GRIND", however:**

1. **Successful Agents** commit to <u>Prospecting Daily</u> & schedule Time Blocking to protect their revenue generating activities. DON'T let anything interfere with your Prospecting time. 2 hours per day of Prospecting is recommended LCT each and every day.

2. **Attitude Matters** – When Prospecting an Agent needs to be enthusiastic, encouraging, and persistent. The Goal of Prospecting is a Conversation. The Goal of a Conversation is Setting a Consultation. To excel, it's important to ask targeted questions and hear the response. Focus on questions that allow you to learn about the Prospect's needs & motivations. Your answers must provide value.

3. **Mindset** – No one enjoys Prospecting "cold" leads. Reaching Leads while they are "thinking about real estate" is the benefit of ***Speed to Lead***. Call all Leads from your Dakno Messenger App within 15 minutes (5 minutes is ideal), including while on Divert. If you reach them during the golden 15 minutes, Leads are much more receptive & likely to see you as adding value for them vs. selling them.

   Once that Golden Period passes, you are essentially another salesperson interrupting them. Don't get discouraged, this is PART OF THE JOB, and resist the temptation to not make the call.

4. **Discipline** – It's easy to "put off" Prospecting, especially when you are successful or actively within a transaction. <u>That is the worst time to let up and your bank account will suffer!</u> Be disciplined and accountable to you…ultimately, it's up to you!

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**1.** **NEW** – Status "New" is temporary. An Agent should have NO leads assigned to themselves in this status.

**TOUCH FREQUENCY – IMMEDIATELY**

**Objective –** The goal is to make contact with a new lead as quickly as possible by phone using your Dakno Messenger App and to set a Consultation to meet in person if local & Zoom if not. The expectation is to contact each new lead and leads returning to the website as quickly as possible.

**The GOLDEN TIME is the FIRST 15-minutes of notification of a lead on the website**.

When connecting with a lead by phone, the goal is to build rapport through intentional conversation. Once rapport is established, move to set the Consultation, and when set, end the call. Send an email to confirm the Consultation or use a "calendar" invite. Text 24 hours prior to confirm the Consultation time & place.

**A Consultation is defined as:** An Agent's 1st meeting face to face with a prospect either at the office, by Zoom, at their home, or meeting at a house for a first showing with written Buyer Agency signed. For returning Converted Clients with a new real estate need, a Consultation is the 1st time you meet again as defined above to discuss that new real estate need.

**NEW LEAD – ACTION PLAN –** Day 1

a) Review the Activity for the lead.

b) **If a Listing Lead, reassign immediately to Listings@lindacraft.com and leave status NEW.** After reassigning to Listings, enter a Quick Note identifying yourself as the Buyer Agent should an opportunity exist and check your name in the Access and Notification section to "Notify users by email when notes are added to this contact." As a courtesy, call or text the Listing Agent on duty to advise of the New Listing lead.

c) **If a Buyer Lead, complete (i), (ii), (iii) & (iv) below (which should take 2 minutes or less) and then CALL the lead IMMEDIATELY using your Dakno Messenger App if between 8AM and 10PM (consider time zones) and leave a voice mail if not answered**.

1. Review lead source Activity (click on "Show" boxes to learn what interested them).
2. View Property organizer to learn if any properties saved & to get general sense of what they are searching (area, bedroom, bathroom, price range). Save their search.
3. Check Phone in Forewarn, enter address in contact information & research ownership.
4. Google the area code to identify possible location where the lead resides if not in Forewarn.
5. Change status to Qualify.

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d) Calling the Lead with your Dakno phone app;

1. If answered, Add Note with important information obtained during your call.
2. Send a Text through Dakno if you left a voice mail or no answer that identifies yourself and the firm and that you are calling from as a courtesy.
3. Create a Quick Note with information to remind yourself about this lead for future prospecting.
4. Check lead's email for obvious mistake (ie: @gnail.com…@gmail.con), correct if necessary.
5. Correct issues with lead information (lower case first letter of name).
6. Send Email No 1 including your Dakno BCC code. This will stop your time clock if you did not call with Dakno number, text or add note in activity earlier. If you email from Dakno, the BCC code should prepopulate.
7. Validate or find the phone number & home address through Forewarn. Use MLS, RPR, Realtor.com, Homes.com, or Zillow to investigate their home address.
8. **Local Address means a possible home to sell now or in future. <u>This is a LISTING LEAD</u>; Leave as Qualify, add the on-duty Listing Agent by checking their name in the Access & Notification section, and call/text the Listing Partner to assess the opportunity. The Listing Partner will engage the Lead to assist in the listing opportunity for the Firm as you work the buy side. Add 5% tag.**
9. Non-Local Address - This is a referral opportunity for you, find a Referral Agent in Dakno so when you connect you can inquire about referring a great agent!
10. Set up home search through Dakno – Saved Search.
11. Check social media icons in Dakno such as Linked In and Facebook, send invites to "friend" you.
12. Check Email Marketing to make sure Data Base Newsletter Campaign is launched.
13. DOCUMENT your interactions not captured in Dakno via BCC code.
14. Check A1 Zoey for insights on follow up. Use LCT Chatgpt for follow up ideas

**NOTE: All new leads in DAKNO between 8AM and 10PM should be contacted by a phone call first within 15 minutes of the lead hitting Dakno. Always Call First using your Dakno Messenger App when a phone is available. This will save yourself considerable time & maximize your conversion rate.**

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**2.** **QUALIFY** – Status "Qualify" is for new or returning Leads to our website & they should stay as Qualify until 6 Touches are made within 2 days or 48-hours.

**TOUCH FREQUENCY – 3 times per Day**

**Objective –** To make contact with the lead to set a Consultation in person if local and Zoom if not.

Steps: Build rapport (ask, listen, learn), set a Consultation, end the call, send calendar reminder or email, & update Notes.

**DAY 2 – ACTION PLAN – 3 TOUCHES**

**ACTION PLAN - PHONE & EMAIL**

a) Call using Dakno Messenger App (possible 2x in a row) and then leave a voice mail
b) Text from Dakno
c) Email (consider a video email to enhance engagement)
d) Send Home Buying or Relocation Guide as appropriate
e) Call Again ½ hour after initial calls

**ACTION PLAN - EMAIL ONLY -**

a) Use Forewarn Reverse Look-Up to find phone number. When found add Steps 1-2 above.
b) Email (consider a video email to enhance engagement).
c) Email items of value to them. Area page, home buyer guide, etc.
d) Set up search on website if you have not already.

**ACTION PLAN – PHONE ONLY**

a) Call using Dakno Messenger App and do not leave message.
b) Call right back and leave a message.
c) Text
d) Call using Dakno Messenger App ½ hour after 1st call.
e) Keep as Qualify

**DAY 3 to 6 QUALIFY ACTION PLAN –** 3 touches as follows:

a) Call or Text from Dakno Messenger App.
b) Send Email 2 or something of value such as link to lender page, free moving truck page, about us, your bio. Remember you are applying for a job. Sell them on why they should hire you.
c) Review Property Organizer and offer to show a property they are viewing or send area page or town they are looking at online.
d) If there's a home to sell check to confirm listing partner set up saved neighborhood search
e) By day 7 - Change Status to Encourage and proceed with Prospecting including launching Buyer Prospecting or Buyer Relocation campaign.

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**3.** **ENCOURAGE** – Status "Encourage" is for leads that you are encouraging yourself to connect with by phone and/or to set a Consultation.

**TOUCH FREQUENCY - 1 Touch At Least Every 14 Days**

**Objective –** To connect with the lead by phone, create a conversation that allows you to be perceived as a resource, obtain important information as to their motivations and timing for buying, & set a Consultation to meet in person if local and Zoom if not.

The reason for encouraging a Consultation is to provide them value by (i) refining their search, (ii) updating them on market conditions, (iii) explain the home buying process, (iv) introducing a lender, & (v) prospecting for a referral (including home to sell or family member).

**ACTION PLAN**: **Always Call First** using your Dakno Messenger App when you have a phone number. Reach out at least once every 14-days and vary the day and time of your prospecting.

a) With a phone number and email. Make sure to complete 6 phone calls, 6 texts (including "Did You Get My Message"), and 3 emails (including "Did I Mess Up").

b) With email only. Make sure to send emails at least 3 emails. Make sure they provide value.

c) Change Status from Encourage to Monitor after day 30 if no contact is made.

**4.** **MONITOR** – Status "Monitor" is for long-term lead incubation.

**TOUCH FREQUENCY –** At least 1 Touch every 30-days until contact is made. After contact is made, use "To Dos" to set Touch points 4x per year. Firm giveaways and community events, like Shred, Food Drives, & Red Cross Blood Donation are great Touch points. Be creative and don't be a billboard in Touches!

**Objective –** To contact the lead to determine their motivations and time frame for buying. If a purchase is 12 months or longer, use the conversation to build rapport and stay in contact using To Dos. If the time frame is 12 months or less, set a Consultation to meet in person if local or Zoom if not local.

**DAILY ACTION PLAN:** Every morning and evening, search Dakno by "Last Site Visit Newest" to identify assigned leads returning to the website. Respond IMMEDIATELY with a call and treat these leads as NEW. Change status to Qualify and work through the Funnel again.

**Once contact is made or after 6-months, set a To Dos for at least 2 Touches per year. Holidays are great touch points. Changes in market activity and interest rates are also great touch points.**

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5. **PURSUE** – Status "Pursue" is for CLIENTS only who have signed Written Agency with the Firm allowing you to represent them or CLIENTS under contract.

   **TOUCH FREQUENCY –** At least weekly. It's important to maintain rapport and the client experience to not "disappear" once a search is set up, home listed, or home under contract. Continue to add value to the client, manage introductions to the Closing Manager as the transition of primary responsibility from you can create frustrations for clients.

   **Objective –** To maintain & enhance rapport throughout the Agency period to closing. During the showing & offer process, remain supportive via communication, anticipate friction points, & educate where necessary on changing market dynamics or contract status.

   The Agent's goal once a home is under contract is to maintain and to enhance rapport with the client and Closing Manager. Remain in communication with the Closing Manager to anticipate & mitigate any friction points for the clients, anticipate friction points, ask for Google reviews & ask for referrals.

   **ACTION PLAN:** Complete a weekly "Check in Call" with all Pursue clients. Set this expectation during the Buyer Presentation, confirming their preferred method of communication, & deliver on this commitment. <u>Remember, "Clients only care about themselves" & "their perceptions become our reality".</u>

   Make sure to <u>turn off</u> the LCT website search once you set up a search on MLS Search.

   Make sure to <u>turn off</u> any Email Market Campaigns that no longer make sense (i.e.: Buyer Prospecting / Buyer Relationship DRIPS). <u>Do not turn off "Data Base: Newsletter"</u>.

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**6.** **CONVERTED** – Status "Converted" is for closed clients.

**TOUCH FREQUENCY**

A) Closed Client Follow-Up - During the 1st Year from closing:
   - i) Call 24-hours after closing
   - ii) Call 72-hours after closing
   - iii) Call 1 week after closing
   - iv) Call 2 weeks after closing
   - v) Call on 1 month closing anniversary
   - vi) Call on 3 month closing anniversary
   - vii) Call on birthdays
   - viii) Call on 1 year Home Closing anniversary and each subsequent anniversary. Use RPR and send a home valuation report to them each anniversary
   - ix) Call to invite to Firm events (shred, pie, knife, blood drive)
   - x) When calling, ask for referrals (friends, family, neighbors, co-workers)
   - xi) Make sure you are connected on social media

B) After the 1st Year: At least 1 Touch every year but more is recommended & 4x is a good goal. Use "To Dos" for important events; birthdays, anniversaries, become "friends" on social media, etc. Firm giveaways and community events, like Shred, Food Drives, & Red Cross Blood Donation are great Touch points.

**Objective –** To remain in rapport with Converted Clients until they relocate out of North Carolina by (i) providing service, (ii) asking for referrals, and (iii) identifying new client opportunities. With the average home ownership less than 10 years, an in-market closed client can transact every 3-5 years and is a great referral source. Great opportunities to reach out and call are Home Anniversary dates, both purchase & sale, (ii) client events, (iii) important personal dates (anniversaries, birthdays), & (iv) major holidays (including Veterans Day for veterans and their families).

**ACTION PLAN:**

For Buyers - Day of closing, set "To Dos" as outlined above. Scheduled random touches to be creative and provide value, such as estate planning, fun things to do, etc.

To retain "good will" with closed buyer clients, it is **vital** to stay in contact & provide service through conversation to lead to referrals and future listing business.

**ENTIRE DATA BASE DAILY ACTION PLAN**

Every morning and evening, search Dakno by "Last Site Visit Newest" to identify assigned leads returning to the website in all status including Converted. Follow up immediately and set up saved search when appropriate. Anyone returning to the site that fills out a form will trigger an email notification to you. **Respond within 15 minutes using a Phone Call First from Dakno Messenger App for the best result.**