LINDA CRAFT
— TEAM —
REALTORS®

DAKNO SERVICE LEAD DISCIPLINE

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. Goal is to assign 1,000 service leads to you within first 30 days. Touch a minimum of 100 prospects per week.

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 communication must provide value.

3. **Mindset** – No one enjoys Prospecting. Reaching Leads while they are "thinking about real estate" is the benefit of ***Speed to Lead***. Always check monitor "last visit newest" to find warmest leads. Call all Leads from your Dakno Messenger App within 15 minutes (5 minutes is ideal). 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.

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!

LINDA CRAFT TEAM

SALES FUNNEL & INCUBATOR

NEW LEADS

DAILY REMINDER | NEWSLETTER LAUNCHED

Remember to set Tags, Saved Searches and Use To-Do!

*All listings go to listing partners ASAP

When Contact returns to site, push notificaiton will be sent to you and status will change to New. Change to Qualify and begin Funnel again.

1. **TRANSFERING LEADS** – Search assigned to service@lindacraft.com, last visit newest. Click to highlight one page, bulk change status to new, highlight new leads in service and bulk change assign to you. Make sure you have not accidentally assigned any real new leads. If you do reassign back to service.

2. **NEW** – Status "New" is temporary. An Agent should have NO leads assigned to themselves in this status after 24 hours.

    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. Add phone number and/or email to LCT Chatgpt and ask for information about this person
    6. Check Zoey A1 for tips on how to follow up
    7. Change status to **Qualify**.

3. **Call** contact 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. Validate or find the phone number & home address through Forewarn. Use MLS, RPR, Realtor.com, Homes.com, or Zillow to investigate their home address.
7. Local Address means a possible home to sell now or in future. After ownership is confirmed, this is a LISTING LEAD; Leave as Qualify, Add tag 5% and seller/buyer tag. Invite the on-duty Listing Partner by checking their name in the Access & Notification section, and call/text the Listing Partner to notify. The Listing Partner will engage the Lead to assist in the listing opportunity for the Firm as you work the buy side. Lead remains assigned to you. Listing Partner to set calendar To Do's for follow up reminders.
8. 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 to a great agent!
9. Set up home search through Dakno – Saved Search.

10. Check social media icons in Dakno such as Linked In and Facebook, send invites to "friend" you.
11. Check Email Marketing to make sure Data Base Newsletter Campaign is launched.
12. DOCUMENT your interactions not captured in Dakno via BCC code.
13. Check A1 Zoey for insights on follow up. Use LCT Chatgpt for follow up idea

NOTE: All leads that return to the site in DAKNO should be contacted by a phone call first within 15 minutes. Always Call First using your Dakno Messenger App when a phone is available. This will save you considerable time & maximize your conversion rate.

QUALIFY – Status "Qualify" is for new or returning Leads to our website & they should stay as Qualify until 6 Touches are made.

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 To Do, & update Notes.

PHONE & EMAIL - ACTION PLAN

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) Email Home Buying or Relocation Guide as appropriate
e) Call Again ½ hour after initial calls

EMAIL ONLY - ACTION PLAN

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 saved search

PHONE ONLY - ACTION PLAN –

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 Launch Buyer Prospecting campaign.

4. **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 at least 3 emails. Make sure they provide value.

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

5. **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.

6. **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 with the client. Do 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. Remember, "Clients only care about themselves" & "their perceptions become our reality".

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

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

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

ENTIRE DATA BASE DAILY ACTION PLAN

Every morning and evening, search Dakno by "Last Site Visit Newest" assigned to you to identify your leads who have returned 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**

NOTE: **any lead assigned to you regardless of status will generate an email push notifications if they fill out a form or save a property**