2023 Sellebration
Weichert®
BAHAMAS

Step 1: Create an awareness of your current pipeline and database health.

Sphere	Active Leads	Clients	Closed
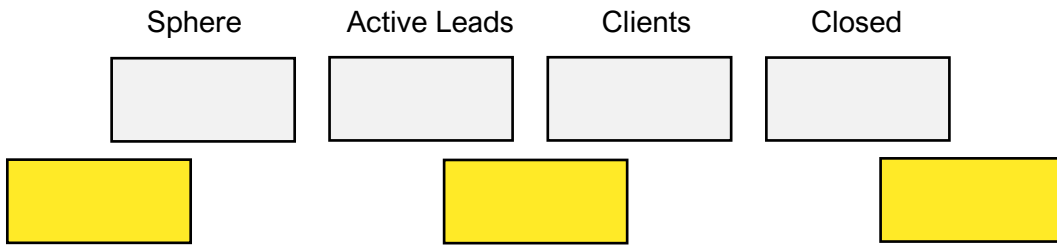
Hot Leads:
How many hot leads did you receive in the last 7 days?

Website Visitors:
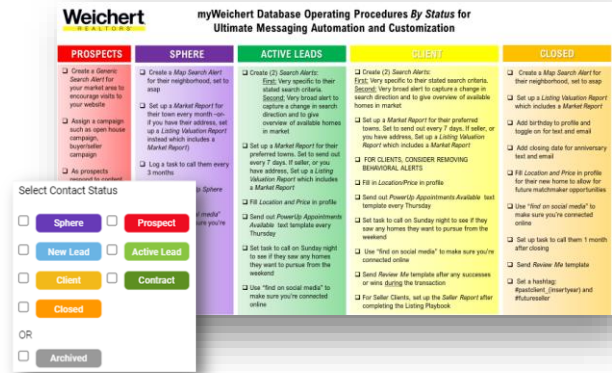How many people have visited your website in the last 5 days?

Database Growth:
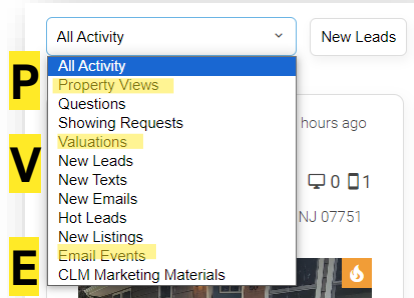How many people have been added in the last 30 days?

Step 2: Use the *Ideas Guide* to choose at least three lead generation ideas to add to your current Sources of Business to grow your database. Add 10 contacts per week.

BONUS IDEAS GUIDE
LEAD GENERATION & CONVERSION
Unlocking Leads in your myWeichert Vault

Step 3: Input/organize contacts using the myWeichert Standard Operating Procedures Checklist.

Step 4: Conduct the Simple Daily Routine "E.V.P" and follow up to set appointments.

P

All Activity
All Activity
Property Views
Questions
Showing Requests

V
Valuations
New Leads
New Texts
New Emails
Hot Leads
New Listings

E
Email Events
CLM Marketing Materials

New Leads

Watch a video to learn about the Simple Daily Routine.

Step 5: Conduct prospecting/lead generation activities to add 10 contacts per week
Each week, designate which lead generation activities your contacts will come from..

Open Houses	Sphere	Referrals	Circle Prospecting	Website/Social	Networking

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Unlocking Leads in your myWeichert Vault

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COMPILATION OF PROPERTIES SQUEEZE PAGE

Audience: Sellers & Buyers

Purpose: Establish yourself as an expert of a specific property type or location by posting the same property compilation squeeze page multiple times a week.

Video How To:
LEAD GENERATION

ADD LEAD CAPTURE TO YOUR OPEN HOUSE SIGNS

Audience: Sellers & Buyers

Purpose: Create sign riders that can clip on to for sale signs and open house directionals to add lead generation to your signs! Utilize your text to lead code to set this feature up!

Video How To:
LEAD GENERATION

SHARE BLOG

Audience: Sellers & Buyers

Purpose: Utilize myWeichert's easy blog post maker to direct traffic to your website. This will help increase prospects searching for properties, which will be recorded on your dashboard for you to follow up by doing our Simple Daily Routine.

How To Article:
LEAD GENERATION

CRAIG'S LIST AUTO-POSTER FOR SEO

Audience: Sellers & Buyers

Purpose: Craig's List auto poster is built into the listing playbook and the listing tab. Use this to quickly create property listings on Craig's list. This increases your SEO tied to the town, address and real estate.

How To Article:
LEAD GENERATION

CORE PROPERTY BOOST

Audience: Sellers & Buyers

Purpose: With a couple of clicks, you can boost listings on Facebook and Instagram. In less than 24 hours, you can have quality leads in your database, ready to work. The average cost per lead is less than $7, making this an easy /economical way to build your database and nurture leads.

How To Article:
LEAD GENERATION

REVIEW ME TEXT SENT DURING TRANSACTION

Audience: Sellers & Buyers

Purpose: Create a quick text template "review me" and make it a habit to send during each of your wins during a listing or a sale. By asking for review during the transaction, you will receive more robust, descriptions of your skills and service.

How To Article:
LEAD GENERATION

LANDING PAGE WITH FREE DOWNLOAD OFFER

Audience: Sellers & Buyers

Purpose: Providing a valuable item in return for contact information is an effective way to build your database with high quality leads to nurture.

Video How To:
LEAD GENERATION

LANDING PAGE WITH SPECIALTY PROPERTIES

Audience: Sellers & Buyers

Purpose: Use a multi property squeeze page (eliminate the registration) link and make a landing page advertising the property selections they will get.

How To Article:
LEAD GENERATION

LANDING PAGE FOR EXCLUSIVE LISTING ALERTS

Audience: Sellers & Buyers

Purpose: Use a landing page to gather leads that are interested in being on your exclusive listing email list.

How To Article:
LEAD GENERATION

Unlocking Leads in your myWeichert Vault

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PITCH SHEET

Audience: Sellers & Buyers

Purpose: Use during buyer & seller consultations. Visually quantify the power of your connections and database to a seller and educate a buyer on their competition at their price point and area they are searching for a home.

How To Article:
CONVERSION

OOPS LETTER TO "HALFWAY" VALUATIONS

Audience: Sellers & Buyers

Purpose: Reach out to potential sellers that clicked off the valuation request when prompted to input personal information. If this happens, their address is still recorded in myWeichert. Download this letter and address to "Homeowner" of the address recorded.

Letter:
CONVERSION

LISTING PLAYBOOK

Audience: Sellers & Buyers

Purpose: Leverage the sophisticated technology of the myWeichert platform with a click of a few buttons. The playbook takes care of the digital promotion and database emails/texts for a new listing or an open house.

How To Article:
CONVERSION

TEXT VIDEO WITH LAST PROPERTY VIEWED "CTA"

Audience: Buyers

Purpose: Use Core Video to engage with website visitors looking at a specific property to get agreement to an appointment. Put a voice and face to the static photo they see on your website.

How To Article:
CONVERSION

USE DIALER TO CALL "ACTIVITY STREAM" IN APP

Audience: Sellers & Buyers

Purpose: Let the power of myWeichert compile your follow up list. The activity stream is a list of those most recently on your website.

How To Article:
CONVERSION

GO-TO FOLLOW UP TEXTS SENT WEEKLY

Audience: Sellers & Buyers

Purpose: Generate 3 go-to texts that you use for follow up weekly:
- Appointments available
- Precision home search
- Review me

Sample Texts:
CONVERSION

FILTERS BY FOLLOW UP

Audience: Sellers & Buyers

Purpose: Organize your SmartCRM filters the way you like to prospect. For example: Closed Clients, Open House Prospects, Current Clients.

How To Article:
CONVERSION

SIMILAR AND NEARBY LISTINGS TAB FEATURE

Audience: Buyers

Purpose: Show your value and make the most of showings. Use the "nearby" filter to add showings to your tour. Use similar listing features to identify homes that are similar to a home your buyer likes/missed out on or that may be at different price point and area that you may miss otherwise.

How To Article:
CONVERSION

CREATE A FILE SYSTEM HASHTAG CHEAT SHEET

Audience: Sellers & Buyers

Purpose: Develop 10 hashtags that you use to file your contacts. This will keep everything organized. For example, #openhouseguest so you have one list with all OH prospects that you've ever met!

How To Article:
CONVERSION

Unlocking Leads in your myWeichert Vault

TASKS TO KEEP TRACK OF FOLLOW UP DURING CALLS

Audience: Sellers & Buyers

Purpose: Always deliver on what you said you would by logging tasks during your calls. This will allow you to stay in rhythm with your calls and handle all the follow up at once after your prospecting session is completed.

How To Article: CONVERSION

MATCHING BUYERS

Audience: Sellers & Buyers

Purpose: While reviewing the daily new inventory in the listings tab, zero in on the best property of the day and use the matching buyers feature to find someone in your database that you can match up with the home. Match the home to a buyer versus matching a buyer to a home. Faster, easier!

How To Article: CONVERSION

"GENERIC" SEARCH ALERTS

Audience: Sellers & Buyers

Purpose: Properties are your product, be sure every prospect in your database has product to look at, even if you don't know exactly what they are looking for. This works because search alerts bring the prospect to your website and records the properties they do look t!

How To Article: CONVERSION

SMART CRM SORT BY "LAST VISIT"

Audience: Sellers & Buyers

Purpose: The closer your phone call is to when your prospect is on your website, the better. This is why sorting by last visited will help you secure appointments at a higher rate.

Video How To : CONVERSION

CREATE DAILY CALL CHALLENGES

Audience: Sellers & Buyers

Purpose: You can set the number of calls you want the system to schedule for you a day. Set at least 30 and stick with it. Treat it like a daily challenge to keep up with it! myWeichert will even email you a reminder!

Video How To: CONVERSION

HOME VALUATION CONTACTS MAILING

Audience: Sellers

Purpose: Sort your home valuation request prospects and generate mailing labels for them in myWeichert. Generate RPR reports and mail the property report with a handwritten card offering a Price Trend Analysis..

Video How To: CONVERSION

TURN ON VALUATION/ MARKET REPORT SETTINGS

Audience: Sellers & Buyers

Purpose: Valuations is a popular seller engagement tactic, turn your settings on so this feature is automated whenever you add an address to your SmartCRM.

Video How To: CONVERSION

CUSTOMIZE BEHAVIORIAL ALERTS

Audience: Sellers & Buyers

Purpose: Be sure you're alerted when your contacts change a behavior. When a contact starts doing something on your website, like revisiting after 14 days, it can indicate a new direction or a commitment to moving forward with a real estate transaction,

How To Article: CONVERSION

SET MONTHLY HOME VALUATION REPORTS

Audience: Sellers & Buyers

Purpose: In SmartCRM, filter by the following: *has primary address* and *no valuation added*. This will help you quickly identify the contacts that you have an address for but are not currently sending home valuations to.

Video How To: CONVERSION

Status Definitions

It's important to understand how you categorize contact status in your platform. It will help you stay organized and focused on who to contact and close first. Here is what each status means:

Select Contact Status

☐ **Sphere**   ☐ **Prospect**
☐ **New Lead**   ☐ **Active Lead**
☐ **Client**   ☐ **Contract**
☐ **Closed**
OR
☐ **Archived**

→ I HOPE TO MAKE MONEY

→ I MIGHT MAKE MONEY SOON

→ I AM MAKING MONEY

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Sphere: Contacts you know, or would recognize your name when mentioned, who may or may not be searching for real estate.

Prospect: Contacts you've met briefly or have information for, who you want to convert into a real estate lead. They are not actively searching right now, and your efforts are directed towards getting them to do so.

New Lead: Contacts who have signed up on your website, either from an ad or some other lead source. You do not "import" contacts to this status. Keep it open for new leads to funnel in.

Active Lead: Contacts who are actively returning to your website to view properties. Contacts you met and had a conversation with but haven't committed to working with you. Leads who respond to communication who have not responded before will automatically default to active status when they respond the first time (if not within the first 2 minutes of the lead's creation in the CRM).

Client: Contacts you are working with, and showing homes, have done a consultation, etc.

Contract: Contacts who are in the buying or selling transaction process.

Closed: Contacts who have completed a transaction.

Archive: Contacts you don't intend to work or communicate with. Moving a contact to this status will unsubscribe them from any further automated communication.

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	SPHERE	PROSPECTS	NEW LEADS	ACTIVE LEADS	CLIENTS	CLOSED
WHAT DO THESE BUCKETS really REPRESENT?	Where most of your business comes from	Your insurance policy for your future business (the gravy)	The proof of the work you're doing with lead generation	Your immediate 90-day pipeline	Your next paycheck	Your source of referrals and future business.
What are you missing out on when they are being worked manually?	**Money.** You miss the opportunity to instill confidence in the biggest, most effective referral source you have. **Said another way, you're staying in the friend zone!**	**Stamina.** You stay on the real estate hamster wheel, which creates burn-out. This is the group that **makes or breaks a career in real estate.**	**Time.** You work triple when you manually generate leads. This is the group that can **give you more free time.**	**Speed.** You can easily lose active leads because you're too busy/not prepared. This is the **group that hurts your momentum and mindset.**	**Security.** You've lost the ability to catch disloyalty, change in direction. This group directly **cuts your pay and puts you at volunteer status.**	**Consistency.** You're cutting out those who have experienced your great service, results and expertise. This is the **group that fills in your production gaps for you, long-term.**
What are your customers missing out on when they are being worked manually?	YOU! Without inherent trust that you're in business and a "good choice", they will go elsewhere and miss out on doing business with you.	Miss out on the reminders and nudges needed to make a good decision!	They don't exist!	Miss out on properties and opportunities to win offers.	They lose money because you are more skilled and have more tools and resources than the competition.	They have to start over again with their next transaction, with an agent that doesn't have prior history to make the transaction easier, faster, better results or less stressful.

myWeichert Database Operating Procedures *By Status* for Ultimate Messaging Automation and Customization

PROSPECTS

- ☐ Create a Generic Search Alert for your market area to encourage visits to your website

- ☐ Assign a campaign such as open house campaign-buyer/seller campaign

- ☐ As prospects respond to content, assign hashtag (#engagedprospect)

NEW LEADS

- ☐ These are incoming leads. Call new leads immediately and move up to Active Lead, Client or down to Prospect

SPHERE

- ☐ Create a Map Search Alert for their neighborhood, set to asap

- ☐ Set up a Market Report for their town every month --or-- if you have their address, set up a Listing Valuation Report instead which includes a Market Report)

- ☐ Log a task to call them every 3 months

- ☐ Send a Sphere Welcome email

- ☐ Use "find on social media" feature to make sure you're connected online

ACTIVE LEADS

- ☐ Create (2) Search Alerts: 1. Very specific to their stated search criteria. 2. Very broad alert to capture a change in search direction and to give overview of available homes in market

- ☐ Set up a Market Report for preferred towns. Set to send out every 7 days. If seller, or you have address, set up a Listing Valuation Report which includes a Market Report

- ☐ Fill Location and Price in profile

- ☐ Send out an Appointments Available" text template every Thursday

- ☐ Set task to call on Sunday night to see if they saw any homes they want to pursue from the weekend

- ☐ Use "find on social media" to make sure you're connected online

- ☐ If open house guest, use #openhouseguest

CLIENT

- ☐ Create (2) Search Alerts: First: Very specific to their stated search criteria. Second: Very broad alert to capture a change in search direction and to give overview of available homes in market

- ☐ Set up a Market Report for their preferred towns. Set to send out every 7 days. If seller, or you have address. Set up a Listing Valuation Report which includes a Market Report

- ☐ FOR CLIENTS, CONSIDER REMOVING BEHAVIORAL ALERTS

- ☐ Fill in Location/Price in profile

- ☐ Send out an Appointments Available text template every Thursday

- ☐ Set task to call on Sunday night to see if they saw any homes they want to pursue from the weekend

- ☐ Use "find on social media" to make sure you're connected online

- ☐ Send Review Me template after any successes or wins *during* the transaction

- ☐ For Seller Clients, set up the Seller Report after completing the Listing Playbook

CLOSED

- ☐ Create a Map Search Alert for their neighborhood, set to asap

- ☐ Set up a Listing Valuation Report which includes a Market Report

- ☐ Add birthday to profile and toggle on for text and email

- ☐ Add closing date for anniversary text and email

- ☐ Fill Location and Price in profile for their new home to allow for future matchmaker opportunities

- ☐ Use "find on social media" to make sure you're connected online

- ☐ Set up task to call them 1 month after closing

- ☐ Send Review Me template

- ☐ Set a hashtag: #pastclient_(insertyear) and #futureseller

ACTIVE LEADS	WHY
☐ Create (2) *Search Alerts*: **1.** Very specific to their stated search criteria. **2.** Very broad alert to capture a change in search direction and to give overview of available homes in market	This is important to help your potential client get a broader overview of the market and to help them consider other areas and options. For potential sellers, it helps them understand secondary competition. Most people buy something other than what they thought they wanted! This gives you a competitive advantage, as most agents send very specific searches. It demonstrates your expertise.
☐ Set up a *Market Report* for preferred towns. Set to send out every 7 days. If seller, or you have address, set up a *Listing Valuation Report* which includes a *Market Report*	Understanding the market weekly is important, as an active lead may buy or sell at any moment. You want to be in front of them often. If you have an address, add a home valuation report, too. This will help solicit responses and comments.
☐ Fill *Location and Price* in profile	This helps you sort and matchmake without opening contact records.
☐ Send out *Appointments Available* text template every Thursday	People want instant service, this helps make them aware, consistently, that you want to meet them.
☐ Set task to call on Sunday night to see if they saw any homes they want to pursue from the weekend	There is data that suggests buyers and sellers will work with the first person they meet, or the person who is in front of them when they want to act. Put yourself in that position, weekly!
☐ Use "find on social media" to make sure you're connected online	Most of your advertising is done on social media, these people should be seeing it!
☐ If open house guest, use #openhouseguest	It's important to have a running list of all open house guests that you've met for easier follow up and increased conversion.

CLOSED	WHY
☐ Create a *Map Search Alert* for their neighborhood, set to asap	You want to reinforce that you are a neighborhood specialist. Once you close with the client, they will start to get acquainted with seeing other real estate agent signs. You want to maintain your presence by being the first person to tell them about a neighborhood listing.
☐ Set up a *Listing Valuation Report* which includes a *Market Report*	You want to tie yourself to a monthly "temperature check" of the value of their home.
☐ Add birthday to profile and toggle on for text and email	Strengthening the relationship with personal messages keeps you top of mind.
☐ Add closing date for anniversary text and email	People tend to reflect on their situations at anniversaries, holidays and birthdays. Make sure you're front and center on the purchase anniversary.
☐ Fill *Location and Price* in profile for their new home to allow for future matchmaker opportunities	Strengthen your matchmaker capabilities. This makes you very valuable to sellers and buyers.
☐ Use "find on social media" to make sure you're connected online	Most of your advertising is done on social media, your past customers should be seeing it!
☐ Set up task to call them 1 month after closing	Luxury item purchases usually have a follow up service call. Treat their home purchase as a luxury purchase experience by following up to check on how they are acclimating to the home. You may be able to provide meaningful help.
☐ Send *Review Me* template	Social proof is important for your future business prospects and also you get valuable feedback to better your business.
☐ Set a hashtag: #pastclient_(insertyear) and #futureseller	This is your virtual filing cabinet. Think about how you want to reference this special group of people and also what you do for them. Think cards, pop-by's, customer appreciation events, quick messages about events. You need their info in one spot to do this with efficiency!

CLIENT	WHY
☐ Create (2) *Search Alerts*: First: Very specific to their stated search criteria. Second: Very broad alert to capture a change in search direction and to give overview of available homes in market	This is important to help your potential client get a broader overview of the market and to help them consider other areas and options. For potential sellers, it's helps them understand secondary competition. Most people buy something other than what they thought they wanted! This gives you a competitive advantage, as most agents send very specific searches.
☐ Set up a *Market Report* for their preferred towns. Set to send out every 7 days. If seller, or you have address, Set up a *Listing Valuation Report* which includes a *Market Report*	Understanding the market weekly is important, as an active lead may buy or sell at any moment. You want to be in front of them often. If you have an address, add a home valuation report, too. Easy to sort and matchmake in your database.
☐ FOR CLIENTS, CONSIDER REMOVING BEHAVIORAL ALERTS	This will allow for more customized, individualized correspondence.
☐ Fill in *Location/Price* in profile	This helps you sort and matchmake without opening contact records.
☐ Send out *Appointments Available* text template every Thursday	People want instant service, this helps make them aware, consistently, that you want to meet them.
☐ Set task to call on Sunday night to see if they saw any homes they want to pursue from the weekend	There is data that suggests buyers and sellers will work with the first person they meet, or the person who is in front of them when they want to act. Put yourself in that position, weekly!
☐ Use "find on social media" to make sure you're connected online	Most of your advertising is done on social media, these people should be seeing it!
☐ Send *Review Me* template after any successes or wins <u>during</u> the transaction	Most reviews end up being a summation of the experience because we ask for them when the process is done. Consider asking for a review about a specific instance within the transaction. This will give potential customers a better idea of what level of result and service you give.
☐ For Seller Clients, set up the *Seller Report* after completing the Listing Playbook	Sellers need to see the result of the behind the scenes work you do!

The Engagement:
🔓 Weichert's Simple Daily Routine

Email Events:
Check this area to see if your contacts are opening your content. Follow up to discuss what you sent them.

Valuations:
These are listing leads. Use our system to follow up with these special leads. They should always be called. Do not email them!

Property Views:
These are properties that were viewed by the contact on your website. Follow up, remembering that they can be a seller or buyer lead. Many sellers use property views to compare their home and "self-price."

Watch a video to learn about the Simple Daily Routine.

Weichert REALTORS

Templates to Create

Appointments Available (Text & Email)
ACTIVE LEADS AND CLIENTS

EMAIL SUBJECT LINE: I have appointments available, let's meet!

Hi {lead_first_name}, it's {agent_full_name} from Weichert Realtors. I have a few appointment slots open for area tours, home price opinions and home showings. Want to go out house hunting? Interested in a quick price opinion? Text, email or call me at {agent_cell_phone}.

Precision Search Text & Email
PROSPECTS

EMAIL SUBJECT LINE: Are you looking for a home you can't find?

Hi {lead_first_name}, it's {agent_full_name} from Weichert Realtors.

Are you looking for a home you can't find? I have great exclusive listing inventory to show. Many sellers in our area are not putting their homes on Zillow. If you tell me what you're looking for, I can set up a more precise search for you and include off market properties. Are you still looking? What are you looking for?

Review Me Text
CLIENTS AND CLOSED

Hi {lead_first_name}, it's {agent_first_name} from Weichert. Thank you so much for your business and trusting me with your real estate needs. I would appreciate a review on my website. Thank you so much! {agent_website}/testimonials.php

Weichert
REALTORS®

Templates to Create

Sphere Text & Email Letter
SPHERE

EMAIL SUBJECT LINE: {first_name}, I have some good news to share!

Dear {first_name},
I'm excited to share some good news, I've joined Weichert, Realtors! You now have a friend in real estate – someone you can call with questions!

As a member of the several multiple listing services, I now have access to information about homes for sale and sold, average prices, and market trends in your area. Whether you're curious about the selling price of a home down the street or simply wonder if prices are up or down in your neighborhood, just get in touch. I'll be happy to do the research and get back to you quickly.

Of course, if you do happen to be in need of an agent to help you purchase or sell a home, I'd love to be that agent. And, if you have a friend or acquaintance in need of a real estate professional, I'd appreciate the referral.

I can provide up-to-date information, home improvement value opinions, home price opinions, and local home vendor resources. You can also count on me to provide honest answers, dependable communication, and total support. Consider me your go-to person for all things real estate! Check out my new website: {site_url}
Also, Try out my instant, automated home valuation tool: {site_url}/sell.php

Thank you for your support!

TEXT VERSION:

Hi {lead_first_name}, how have you been? I'm updating my real estate database and I have a great monthly home appreciation report. Please respond back with your home address and email if you'd like to receive it. Hope to catch up soon! {agent_full_name} Weichert Realtors. Text back/call me at {agent_cell_phone}!