ELITE RETREAT 2025

Simplifying Lead Conversion in Your CRM

Preserve your human time by establishing systems that make lead follow-up more manageable.

ELITE RETREAT

2024


TAKE
LIFE
THESE
FIGHT

Cancer
6 Surgeries
29 Rounds of Radiation

9 months of Zero Prospecting

“

Systems and tools can turn chaos into clarity.

Simplify Lead Conversion

Protect your human time by creating systems that make lead follow up more manageable with these 3 pillars

1

Setup for Success

2

The Best Practices

3

A Little Help from AI

SETUP FOR SUCCESS

“Success is the sum of small efforts, repeated day in and day out.” — Robert Collier

Sources

- Standardized lead sources
- Capture source data accurately
    - go beyond “Social Media”- Instagram, Facebook, etc.
- Track your ROI per lead source
    - **Volume:** Number of leads generated from each source.
    - **Conversion Rates:** Percentage of leads that convert into clients.
    - **Cost per Lead:** The amount spent to generate each lead.
    - **Lifetime Value:** The total revenue generated from clients acquired through a particular source.
- Adapt strategies & ad spend

Tags

Buyer Tags

- First-Time Buyer
- Move-Up Buyer
- Luxury Buyer
- Investor
- Relocation Buyer
- Needs Financing
- Cash Buyer
- Hot Buyer
- Cold Buyer

Seller Tags

- Downsizer
- FSBO
- Expired Listing
- Luxury Seller
- Relocation Seller
- Motivated Seller
- Unmotivated Seller
- Needs Staging

Relationship Tags

- Past Client
- Repeat Buyer/Seller
- Sphere of Influence (SOI)
- VIP Client
- Referral Source
- Long-Term Nurture

Geographic Tags

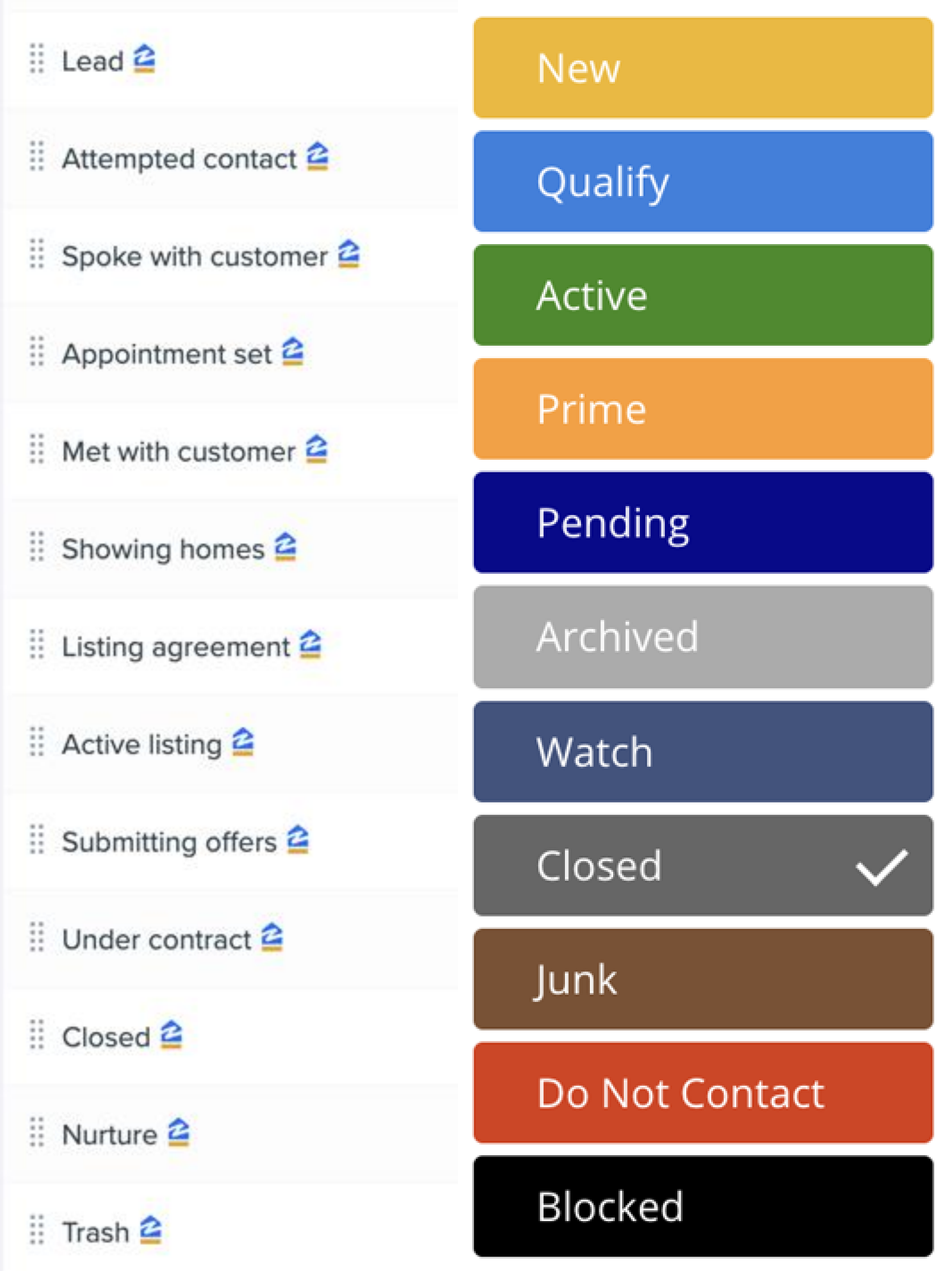
- Neighborhood-Specific (e.g., "Downtown," "Westside")
- City-Specific (e.g., "Phoenix Buyer")
- School District-Specific
- Out-of-State Lead
- International Lead

Behavior Tags

- Viewed Property
- Clicked Email Link
- No Response
- Responded to Text
- Scheduled Showing
- Attended Open House
- Canceled Appointment
- Multiple Property Views

Stages

- Provides clear organization & focus
- Lead prioritization
- Customized follow up
- Pipeline health
- Optimizes use of automation



Stages (take a pic 📷)

NEW

- Definition: New leads, leads who have not yet responded to anything
- Your Commitment: Call a minimum of 1x per day for 14 days or until they respond, set up e-alerts if not already set up
- Timeframe: <30 days
- Next Steps: If they respond, change status to WATCH or NURTURE

QUALIFY

- Definition: 2-way convo and have not gotten time frame or appointment yet
- Your Commitment: Call until timeline is established; set up e-alerts if not already set up
- Timeframe: <60 days
- Next Steps: If they are moving in less than 90 days, set appointment and move to HOT status; if their time frame is >90 days, move to NURTURE status and update e-alerts

NURTURE

- Definition: 2-way convo and their time frame is <2 years
- Your Commitment: Check in by phone every month; set up e-alerts if not already set up
- Timeframe: <2 years
- Next Steps: As their time frame approaches, set appointment and move to HOT status; if their time frame changes, update e-alerts and to-dos

HOT

- Definition: Appointments Set (date, time, place) & Active Client (signed Buyer Rep or Listing Contract)
- Your Commitment: Confirm appointment with them the day before/morning of appointment, then work with them diligently to achieve their goals
- Timeframe: <3 months
- Next Steps: Prepare consultation materials, communicate at minimum weekly, and update e-alerts as necessary

Laws of the Pipeline

- Standard for how leads move through CRM
- Enables implementation of automated workflows
- Creates communication protocols
- Reduces decision fatigue

👥 Team Leader Tip: “Laws of the pipeline” ensure a more consistent and efficient approach to lead management and agent training.

CRM usage can lead to a 50% increase in productivity 🧠🙌

*According to studies done by depositfix and sloboda-studio

Stages	Definition	Time Frame of Stage	Goal	Expectations
Lead	New Lead	24 hours or less	-Initiate contact	-Call, Text, or Email until Contact is made. -Move stage to **Attempted Contact** or **Spoke with Customer**
Attempted Contact	No Contact Made	90 days, Until contacted or Trashed	-Have an initial conversation	- Call 1x every 3 days for 14 days (set **Task in FUB)** - Follow Call up with Text (Sent through **FUB**) -After 14 days, call weekly for 90 days (set **Task in FUB)** -Move to stage **Spoke with Customer**
Spoke with Customer	Had an initia two-wayl conversation	0-6 Months (if intent to transact)	-Begin qualification process • Working with agent • Financing • Time Frame -Set an appointment (**ALM**) • Show Home • Buyer Interview • Listing or Pre-Listing Appointment • Appraisal Walkthrough	-Send Follow Up text message with business card (Through **FUB**) -Move stage to **Appointment Set**, **Nurture,** or **Trash** **-** If looking to transact in 0-6 months set up property search in **YLOPO STARS** **-**Add **Ylopo STARS** link to **FUB**
Appt Set	A scheduled time to meet with buyer or seller	Initial Conversation- date of scheduled appointment (should be no longer than 7 days)	-a date, time, and location was set to meet customer	-Confirm appointment with customer via text -Prepare other properties to potentially show client -Prepare comps for listing

Automation

- Integration: Sync Your CRM
  - Lead Producers
  - Email Service Provider
  - All other tools Mailbox Power, Fello, Realscout IDX
- Lead Routing
  - Speed to lead
  - Communication Campaigns
  - Tags

👥 Team Leader Tip: Use automation to assign leads to the appropriate team members based on criteria like geography or type of lead.

Workflow Automation

- Design a standardized processes with triggers and follow-up actions
- Automatically assign tasks to team members based on lead status changes or specific events
- Example workflow:
    1. Tag new leads as "Specific Source"
    2. Send automated welcome email & text
    3. Systems generates a generic e-alert
    4. AI engages lead through text or call
    5. Assign follow-up call to team member when lead responds
    6. Notify agent when tagged as "AI engaged"

"Automation makes time-consuming tasks easier and you can spare more time on building your brand.
- Salesmate

BEST PRACTICES

79% of leads are never followed up on, according to NAR.

Create a Daily Workflow

- Notifications
  - New Leads
  - Active Leads
- Inbox
  - Responses
- Tasks
  - Days by Design
- Calls
- Appointments or hunt for business

Summary Icons

Location, Price, Motivation, Agent, Mortgage, and Appointment.

- 📍: Location
- 💵: Price Range
- ▯ : Motivation
- 🧐: Agent
- 💳: Mortgage
- 📅: Appointment

Always keep the icons in a note or summary section in your CRM. Don't make it difficult for yourself!

Accountability & Call Filters

- **Create shortcut filters to help you identify leads that need attention**
  - Active on the website that have not been called
  - Leads without an e-alert
  - Leads that have not been called in x days
  - Leads not on a action plan
  - Closed clients that have not been called in 90 Days
  - Leads that looked at their home value
- **Saved filters help you...**
  - Identify leads that need to be called
  - Identify leads that need action plans
  - Identify leads that should be moved into a new stage
  - Identify leads that need to be maintained

Accountability & Call Filters

Name
❗ Today's Total Team Leads
1️⃣ New- Call ASAP Brand new leads, no recent call made or text sent
2️⃣ $-Raiya, Handraisers, And Call Nows Leads that have responded to Raiya
3️⃣Hot Leads- Call To Close Hot Prospects- Weekly Call to Close List
4️⃣ Nurture- Call Monthly Nurture Updates

Name
List 1: NEW - No Contact
List 2: New Priority Alerts
List 3: New - Needs Convo
List 4: Client Priority Alerts
List 5: Submitting Offers - Needs To Buy
List 6: Hot Client - Push Listings
List 7: Set An Appointment!
List 8: Short Term Nurture
List 9: Long Term Nurture
List 10: Past Clients

SMART FILTERS

PLA CALLS

Prioritizes newly registered leads and those triggering a priority lead alert. Daily call task for up to 7 days or until contact is successfully made, ensuring prompt engagement and responsiveness.

CONVERSATIONS

Identifies leads in 'Active' status, indicating ongoing conversation engagement between the agent and the lead. Used to establish the lead's timeframe, milestones, and motivation.

NEEDS ATTENTION

Identifies leads in Active status that have not contacted by the agent in 3 days or more, or lacking future task assignments, ensuring proactive follow-up to maintain engagement and progress

CALLS / TASKS DUE TODAY

Populates tasks set manually by agents or through call plans assigned by agents. Prioritizes tasks assigned directly by agents, ensuring focus on personally designated responsibilities.

NEW > ENGAGE

Prioritizes leads in 'New' status for immediate follow-up and engagement. Protocol: Tasks a call every 3 days for 21 days, or until the lead responds, to maximize conversion opportunities.

QUALIFY > ENGAGE

Identifies leads in 'Qualify' status, requiring regular follow-up. Criteria: Lead must have been active within the last 30 days. Action: Tasks a call every 15 days to ensure ongoing engagement and qualification.

WATCH > NURTUE

Identifies leads in 'Watch' status designated for long-term nurture, either with a timeframe of 6+ months or more. Action: Assigns a call task every 30 days to facilitate ongoing engagement and nurture.

WATCH > PLA

Identifies leads in 'Watch' status requiring long-term nurture, with triggered Priority Lead Alerts. Recommended action: Engage with leads promptly via email, text, or phone call for effective follow-up.

PRIME CHECK

Identifies leads in 'Prime' status. Simplifying the process of sorting and managing your prime leads.

REACTIVATION CAMPAIGN

Leads that have been assigned to a Reactivation Campaign. It streamlines the viewing and management of leads designated for reactivation by users.

RE-ENGAGE OPPORTUNITIES

This filter identifies leads with the potential for reactivation. These leads may benefit from targeted re-engagement efforts

NEEDS ACTION PLAN

Accountability: Leads in New, Qualify, or Watch that are not assigned a Fully Automated Action Plan (FAAP).

NEEDS E-ALERT

Accountability: Buyer leads that need to be assigned a E-Alert.

NEEDS MARKET REPORT

Accountability: Seller leads that need to be assigned a Market Report.

Text & Email Templates

- Time efficiency
    - **Save your human time**
- Consistency & Professionalism
- Streamline Communication
- Performance Optimization

Text & Email Templates Ideas (take a pic 📷)

1. Deal of the Week
2. Zestimate
3. Buyer Returned To Site
4. Buyer Saved Property
5. Follow-Up On Listing Alerts
6. Quick Market Update
7. Seller Success Story
8. Lead Response = Already Bought
9. Closed Client Anniversary
10. Instant Home Valuation

Dynamic Smart Campaigns

- Automation & personalization
- Timely & trigger-based
- Multi-channel
- Analytics to optimize performance

Bludoor: Buyer - Long-Term Engagement for Unresponsive Leads [Automation]

Long-Term Nurture Plan for Buyer Leads. Assigned automatically by automation to buyer leads that complete any initial 30-day Qualifying Action Plan without response, contact by phone, or change of status. Designed for extended nurturing of leads.

54 Activities / 730 Days

95%	21	320	31	7	0
Response Rate	Responded	In Progress	Paused	Completed	Unsubscribed

We’re currently reaping the benefits

34088 N Elizabeth Lane - under contract

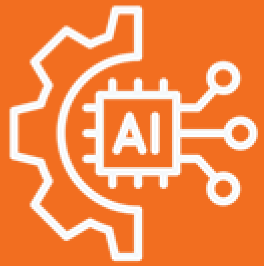
The owner was in our system for 7 years.

We didn’t call him for the past 4 years, but the system was still emailing him our market updates and engaging with him.

When he called us this year to list his home, he said “You hung in there for 7 years, I figured it was worth it to work with you”.

A Little Help from AI

AI is to real estate what GPS is to navigation. You can still get there without it, but it’s so much faster and easier with it.



AI Communication

- 24/7 lead engagement
- Dynamic responses based on lead behavior
- Predictive analytics lead scoring
- Suggested tasks and call lists

Suggested Tasks

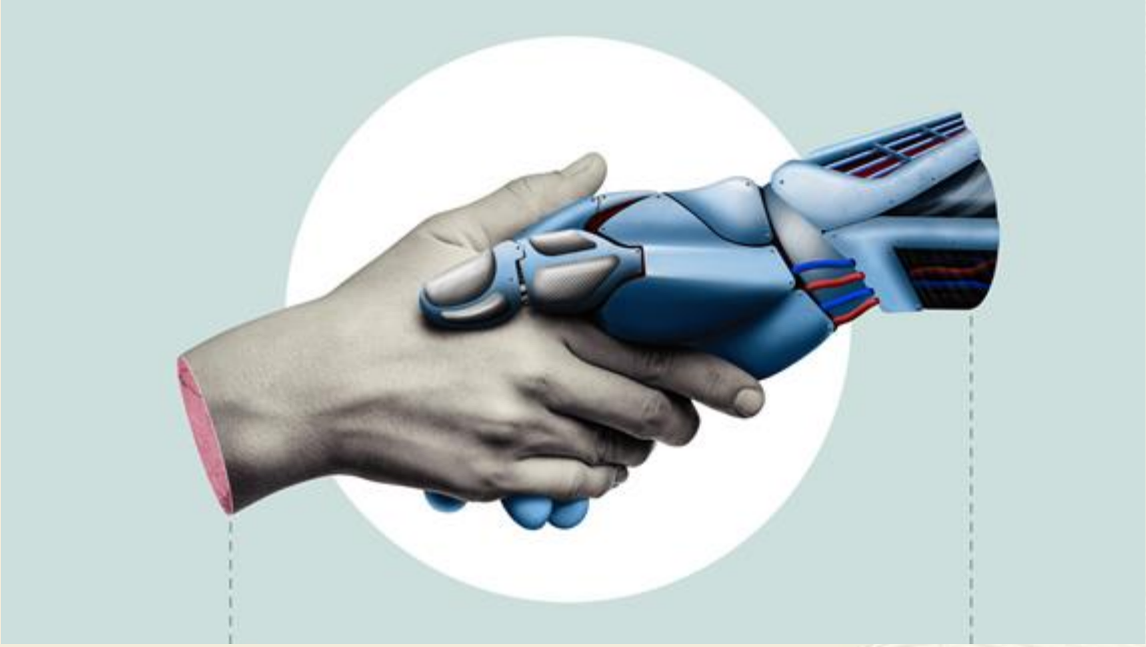
- Send the home value report to the lead's email from
- Ensure the email includes estimates from both **Zillow** and **Attom**.
- Follow up with the lead in a few days to confirm receipt of the email and see if they have any questions.
- Keep the lead on a monthly alert for neighborhood market updates in **Brentwood**.
- Document the lead's interest in selling and their current relationship with another real estate agent.

Summary Transcript

- The call was initiated regarding a home value request for a property in **Brentwood** off of **Somerset Drive**.
- The lead expressed interest in obtaining a home value estimate but was not ready to proceed immediately.
- The agent offered to send a report with estimated property values based on data from **Zillow** and **Attom**.
- The lead mentioned having a sophisticated spam filter and warned that the email might end up in spam.
- The lead is considering selling the property but has not made a final decision and currently has another real estate agent.
- The agent assured the lead that they could provide further assistance if needed in the future.

AI Coaching

- Increase efficiency, transcription and note taking automatically happens
- Focus on building rapport not note taking
- Flag missed opportunities
- Highlight strong moments
- Suggest specific phrases to improve



Call Analysis Prompt Part 1 (take a pic 📸)

"Please analyze the following call transcript. Identify key strengths and areas for improvement in the conversation, focusing on the following:

1. Rapport Building: How well did I establish a connection with the client? Highlight moments where rapport was built and suggest ways to improve.
2. Question Techniques: Evaluate my use of open-ended, calibrated questions. Did my questions uncover the client's needs and motivations? Suggest 2-3 better questions I could have asked.
3. Objection Handling: How effectively did I address any objections or hesitations? Highlight specific objections raised and how they were handled. Suggest alternative ways I could have responded.
4. Call Flow: Was the conversation structured logically and smoothly? Identify any points where the flow was interrupted and suggest ways to maintain momentum.

Call Analysis Prompt Part 2 (take a pic 📸)

5. Actionable Next Steps: Did I clearly establish the next steps for the client? If not, suggest how I could have guided the client toward a decision or appointment.

6. Tone and Phrasing: Analyze my tone and word choice. Were they confident, professional, and empathetic? Suggest adjustments if necessary.

7. Missed Opportunities: Highlight any missed opportunities for follow-up questions, addressing concerns, or closing on a commitment.

Provide specific examples from the transcript, actionable feedback, and a summary of how I can improve future calls. Focus on helping me refine my skills for better lead conversion and client satisfaction."

AI Enabled Agent

Bringing it Together: Example Workflow

1. A lead visits your website and chats with a bot to inquire about a neighborhood.
2. The chatbot schedules a call and sends an automated follow-up email.
3. You take the call, which is recorded and transcribed by AI.
4. The CRM scores the lead high due to recent activity and sends them into a hot lead nurture campaign and applies a tag “return to site”.
5. AI suggests a follow-up script to address any objections from the call.

Practical Application

Opening Framework and Rejection-Free Openers

- Current Approach: James opens with, "Hi, there, this is James from (Brokerage). I was reaching out to David regarding a home value request."
- Suggested Improvement: To spark curiosity, James could use a perspective-shifting opener, like:
    - *"Hi David, this is James from Brokerage I’m reaching out because you requested a home value estimate, and I have some interesting findings on the Brentwood property I think you might find useful."*
- Using “interesting findings” and mentioning specifics (Brentwood property) makes it sound more personalized and invites curiosity without being salesy.

Call Evaluation - missed opportunities

Calibrated and Curiosity-Driven Follow-Up Questions

- Current Approach: James shares data but doesn’t ask follow-up questions to explore David’s motivations or interests.
- Suggested Questions:
  - *"Out of curiosity, is there a particular reason you’re considering a cash estimate for the property right now?"*
  - *"What are your plans for this property if you don’t mind me asking? That will help me tailor the info we provide."*
- These questions invite David to reveal his intentions (e.g., potential sale, refinancing, etc.), which could guide James in offering relevant services.

Call Evaluation

Magic Words for Securing an Appointment

- Current Approach: James closes with, “We offer a more detailed analysis if you are interested.”
- Suggested Next Steps:
  - James could end with an engaging, rejection-free line like, *"If it wouldn’t be too much trouble, I’d love to follow up in a week or so to see if you have any questions. Would that be all right?"*
  - Another option could be, *"I’ll make sure to stay available if anything comes up—don’t hesitate to reach out if you’d like to explore options further."*
- By providing a clear next step or keeping the conversation open, James encourages future engagement without sounding pushy.

Call Evaluation

Summary of Key Recommendations:

- Start with a curiosity-inviting opener to spark David’s interest.
- Use calibrated and curiosity-driven questions to explore David’s needs and motivations.
- Integrate rapport-building techniques, to strengthen connection.
- Lead toward a natural next step with phrasing that subtly suggests an appointment.
- Minimize filler words for a concise and professional tone.
- Close with rejection-free language to keep the door open for continued engagement.

Get into Action Simplify Lead Conversion

Decide now what you will implement in your CRM

1. Create a Routine
2. Organize your leads
3. Manage your Pipeline
4. Use the tools
5. Implement AI
6. Don’t give up :)

Take action now....

so your CRM can act for you if/when

$#!+ hits the fan.