



ISA Best Practices

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Boost Performance, Build Relationships, Drive Results,
Maximize Conversion & Achieve Success



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The Why, How, What and When...

01. Why

Importance of ISAs

02. How

ISA Best Practices & Lead
Conversion Strategies

03. What

Key Metrics to Track

04. When

Action Plan

05. Who

Who do I hire & How do I pay them?



Why Inside Sales Agents (ISA's) Matter...



ISAs are the frontline for lead qualification, nurturing and conversion.



A dedicated ISA increases agent efficiency by focusing on qualified leads and ensuring that all leads are contacted and nurtured. Database Management as a whole.



Effective ISAs drive revenue growth and maximize ROI on marketing efforts.



Additional accountability and tracking of leads that are handed off to agents.



Building the High-Performing ISA Team

1

Hire the Right Talent

Know what you need (Inbound, outbound or combo). Look for communication skills, organization, persistence, and coachability.

2

Have a Budget & Hire Accordingly

You can scale it later.
Train in groups whenever possible.

3

Provide Comprehensive Training

Teach Scripts, Objection handling and CRM usage

4

Foster a Positive Culture

Celebrate wins & encourage continuous improvement

5

Equip with Tools

Use robust CRM systems, auto-dialers, & call tracking



QUALIFY LEADS EFFECTIVELY



- 01 Use the LP-MAMA Framework
- 02 Location: Where is the lead interested in?
- 03 Price: What is their budget?
- 04 Motivation: Why are they buying/selling?
- 05 Agent: Are they currently working with one?
- 06 Mortgage: Are they pre-approved?
- 07 Appointment: Set a meeting to move forward.



OVERCOMING COMMON OBJECTIONS



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"I'm just looking": "That's great! What sparked your interest today?"



"I'm not ready yet": "Totally understand—what's your timeline?"



"I'm working with another agent": "Fantastic! How's that going for you?"



Use empathy: Listen actively, validate concerns, and provide solutions.



Strategies for Higher Conversion Rates

1

Speed to Lead:

Respond to new leads within 2 minutes.

3

Personalized Messaging:

Tailor communication to the lead's stage and needs.

2

Consistent Follow-Up:

Use a multi-touch approach—calls, texts, video, and emails.

4

Appointment Setting:

Prioritize in-person, virtual meetings & branded video messaging with team agents to build trust.



Effective Time Allocation

1

Block time for lead generation and follow-ups.

2

Use CRM productivity tools like calendar reminders, dialers and task prioritization.

3

Limit distractions and batch similar tasks.



Measure Performance to Improve Results

- **Contact Rate:**
% of leads contacted successfully
- **Appointment Rate:**
% of leads scheduled for a meeting.

- **Show Rate:**
% of appointments attended.
- **Conversion Rate:**
% of leads converted into clients.
- **Pipeline Health:**
Monitor leads by stage in the sales funnel.



Implementing Best Practices



Audit your current ISA processes. Set goals and schedules for optimal results.



Improve response times and follow-up systems. Keep agents accountable.



Celebrate & reward successes and reiterate processes (or punish in private when necessary) based on data.



Train your team on qualification frameworks and objection handling. (All Agents start with them).



Set up tracking for key metrics and review





BoomTown!



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