



New Lead - 10 Day Checklist:

STOP #1 Goal - Stop the Search STOP

Keep your customers shopping in your online store. Remember what is important to your consumers:

- Secure place to search real estate inventory
- Relevant Information:
 - Market Stats, location, affordability, mortgage rates, life events, etc.
- Respect their timeline - Meet them where they are
- Fast response once they are ready to engage

10 Day - New Lead Checklist

Your first 10 days should be spent trying to connect with the new lead so you can

1. Determine the Lead Timeline AND 2. Activate their Nurture Plan based on where they are in their timeline.

Pro Tip Let kvCORE do the heavy lifting. Make sure you have turned on the CORE New Lead Buyer and CORE New Lead Seller smart campaigns.*

<input type="checkbox"/> Day 1 <input type="checkbox"/> Agent Task - Call ASAP (within 5 minutes) <input type="checkbox"/> System - Text <input type="checkbox"/> System - Follow up email	<input type="checkbox"/> Day 6 <input type="checkbox"/> System - Text <input type="checkbox"/> System - Follow up email
<input type="checkbox"/> Day 2 <input type="checkbox"/> System - Email	<input type="checkbox"/> Day 7 <input type="checkbox"/> Agent Task - Call <input type="checkbox"/> System - Email
<input type="checkbox"/> Day 3 <input type="checkbox"/> Agent Task - Set up listing alert	<input type="checkbox"/> Day 8 <input type="checkbox"/> System - Text
<input type="checkbox"/> Day 4 <input type="checkbox"/> Agent Task - Call	<input type="checkbox"/> Day 9 <input type="checkbox"/> Agent Task - Review Lead Activity
<input type="checkbox"/> Day 5 <input type="checkbox"/> System - Email	<input type="checkbox"/> Day 10 <input type="checkbox"/> Agent Task - Call

You Have a New Lead, Now What?

After completing your 10 day new lead checklist, follow the guidelines below to determine which status you should mark your new lead and which actions to take to nurture. Remember 85% of your new leads will end up in the Prospect bucket during this timeframe.

PROSPECT

Lead Timeline: Phase 1 - Information gathering and researching.

- Has communicated that they are not ready at this time

OR

- You have not made contact within 30 days

Nurture Plan: Long Term - Drip

ACTIVE

Lead Timeline: Phase 2 Active Research

- You have made contact

OR

- Lead has communicated that they are actively searching for a home or preparing to sell

Nurture Plan: Short Term - Engaged

Prospect Checklist

- Activate a Generic Weekly Search Alert
- Activate a Smart Campaign (long term buyer/seller, holiday, newsletter)
- Activate a Monthly Market Report
- As leads engage update their status and be ready to respond quickly

Active Lead Checklist

- Activate 2 Search Alerts. #1 meets their criteria. #2 captures listings in the broader area
- Activate a Market Report or increase cadence to 7 days
- Schedule weekly calls to review wants/needs/findings. Minimum 1x per week