



Follow Up Best Practices Every Agent Needs



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3 TO-DO'S BEFORE YOU IMPLEMENT YOUR FOLLOW UP PLAN

Determine the capabilities within your CRM

A robust follow up and conversion plan requires a CRM platform that can automate tasks, organize your leads and track lead behavior all while being easy to use and implement.

Create a system for labeling your pipeline

A dynamic platform, like Lofty™, has the capability to bucket your leads with custom pipelines and groups.

PIPELINES

New Leads	Under Contract
Attempting Contact	Appointment Set
Cold	Appointment Met
Warm	Contract Signed
Hot	Closed

GROUPS

Referrals	Seller Leads
Sphere of Influence	Property Management
Past Clients	Second Home Buyers
Buyer Leads	

Build your Smart Plans

Automated follow up campaigns are essential for effective conversion because it ensures you are always in front of your leads without you having to manually initiate every follow up task. Everything is sent strategically, based on actions that leads take on your site – so they'll get listings that are tailored to their preferences, and communication that is relevant to their timeline.

PRO TIP - Build your Long Term Nurture Smart Plans first to automate a majority of your communications in turn allowing you to focus on hand Raisers.

LEAD QUALIFICATION PLAN

Lead Registers

Make contact within 30 minutes

Speed to Lead is essential for effective follow up. Responding to leads quickly can increase conversion rates by 391%

Lead Answers

- Qualify the lead
- Set up a property alert based on search criteria

Move Lead To Correct Pipeline & Group

Contacted Working

In the inquiry stage but could be ready if the right property

Cold Nurture

Maybe 6-12 months before they're ready

Hot Lead

Maybe pre-approved, motivated and ready to move forward

Appointment Set

Appointment confirmed with the lead for a tour or home evaluation

Lead Doesn't Answer

- Over the next 10 days, make 12-16 attempts to make contact

Qualify the Lead

Build a "Buyer and Seller Lead Qualification Smart Plan" that automates most of the first 10-15 contact attempts so you can focus your efforts on hand raisers.

PRO TIP

Calling your leads twice within a 5 minute window circumvents "do not disturb" and encourage connection since the lead will feel like the call is important.

Info Is Incorrect



Which channels should you be reaching out through?

5-6 Phone Calls
4-5 Texts
4-5 Emails

PRO TIP

Texts tend to be more effective than email having a 90% open rate compared to a 20% open rate in emails.

Too busy to follow up? Get Yourself An AI Assistant!

Now you know what to do when you connect with a lead, but what happens when your lead registers at 2am laying in bed?

If you find yourself too busy to monitor your database or simply want to spend your time focused on more dollar productive activities, consider implementing an AI Assistant.

An ISA That Never Sleeps!

Turning your leads into gold, the AI Assistant's conversation covers the entire buying and selling process, helps set client appointments and showings, and integrates with all your Smart Plans so a lead never slips through the cracks.



Smart Plan Recommendations

- Utilize our Smart Plan Library - No sense in recreating the wheel!
- Use website links within Smart Plans to drive traffic back to your website
- Implement a daily schedule to stay in front of daily tasks assigned from Smart Plans

Features - Smart Plans (Combine)				
My Smart Plans		Team Smart Plans		
Plan Name	Type	Steps	Duration	
Open House Smart Plan	B&S	1	0 day	
Realtor Touch	Other	2	90 day	
Paul's Success Steps	ALL	2	0 day	
leads want to buy in 3 months	B	3	3 days	
3 Day Blitz - 8 Touch Plan in 3 days	ALL	8	2 days	



ADDITIONAL RESOURCES

Lead Generation

- [Lead Generation Setup & Expectations](#)
- [Filling Your Pipeline](#)
- [360° Marketing Strategy](#)

Lead Conversion

- [Strategies To Maximize Lead Conversion](#)
- [Conversion Tactics for 2023](#)
- [Why Focus On Lead Conversion More Than Lead Generation](#)

Smart Plans

- [Refreshing Your Smart Plans To Match The Current Market Conditions](#)
- [Lead Routing Follow Up Systems](#)
- [Help Center Article: Managing Smart Plans](#)

AI Assistant

- [Embracing AI - The Key To Winning](#)
- [Leveraging AI Without Losing Authenticity](#)
- [2022 AI Growth Trends](#)

Social Media

- [Top Social Media Strategies for Teams & Brokerages](#)
- [Tips To Power Up Your Social Media](#)
- [Leveraging Social Media For Low Cost Lead Generation](#)