

Follow Up Best Practices Every Agent Needs



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



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 GROUPS New Leads **Under Contract** Referrals Seller Leads **Attempting Contact** Appointment Set Sphere of Influence Property Management Appointment Met Second Home Buyers Cold Past Clients Contract Signed **Buyer Leads** Warm Closed Hot

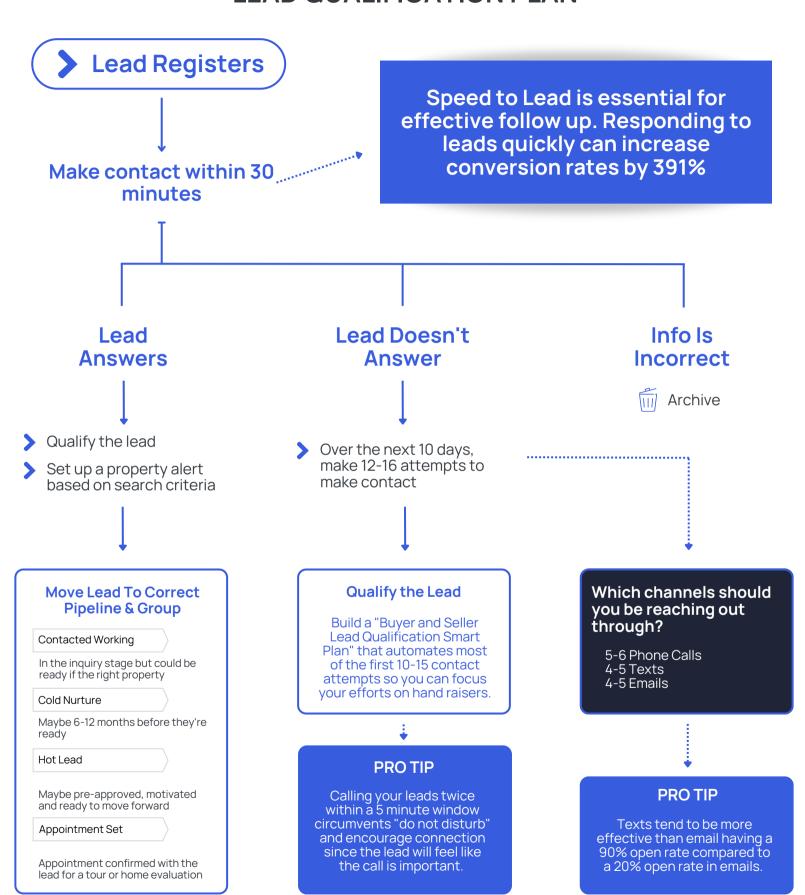
Build your Smart Plans

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





Too busy to follow up? Get Yourself An Al 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 Al Assistant.

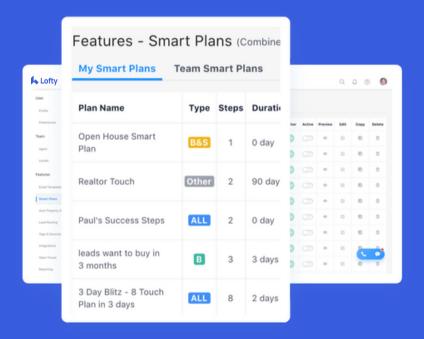
An ISA That Never Sleeps!

Turning your leads into gold, the Al 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





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

Al Assistant

- Embracing AI The Key To Winning
- Leveraging Al Without Losing Authenticity
- 2022 Al 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

