

The Keys to Contact Follow-Up Plan

I have been recommending that my agents start texting new leads first, to let them know who will be calling so they are more likely to answer. The results have been Incredible! My agents have said that many more people are answering their calls and they are sharing more intimate details too! Here are the keys to make this really successful.

First, I recommend you create at least two text message shortcuts that allow you to quickly send text messages to new leads. I have included the templates for each of these text messages below along with links that show you how to create these shortcuts ([Text Message Shortcut on iPhone](#) or [Text Message Shortcut on Android](#)).

Text Message Templates

1. Hi, this is <Your Name> and I am responding to your request for information about 55+ and Active Adult Communities in <Your City or Area>. I am excited to hear your story and answer any questions you may have. I will call you in 1-2 minutes. Thank You! <Your Name> <Your Cell Phone Number>
2. Hi, this is <Your Name> and I am responding to your request for information about real estate in <Your City or Area>. I am currently in an appointment, but I will call you as soon as I am finished. I am excited to hear your story and answer any questions you may have. Thank You! <Your Name> <Your Cell Phone Number>

Second, we ask our Partner Agents to commit to texting, calling, and emailing our leads within 15 minutes, every time possible. I would time block your schedule from 9:00 – 9:30am each morning to call all of your Attempted Contact Leads. Here is our recommended follow up plan for New Leads until you connect with them.

Recommended Follow Up Plan

Day 1 = Text -> Call -> Email New Leads within 15 minutes, every time possible. Later that day, call them again.

Day 2 = Call all of your Attempted Contact Leads. Text or email your Attempted Contact Leads too.

Day 3 = Text and/or email your Attempted Contact Leads again.

Day 5 = Call your Attempted Contact Leads again.

Day 10 = Send Final Goodbye Email (Email Template Below)

Day 15 = If the lead has not responded to you, Archive this Lead, select Unresponsive as the substatus, and add this Lead's email address to your newsletter list.

Final “Goodbye” Email

Subject: [LEAD NAME], can you help me out?

Hi [LEAD NAME],

I did my best to reply to your inquiry regarding <Neighborhood Name> as quickly as possible, and even followed up a few times to try to reach you.

It seems like your plans may have changed, and I don't want to bother you. Before I remove you from my client list, can you do me a quick favor? Please reply to this email and let me know if you would like me to help you with your real estate needs.

I appreciate it so much.

P.S. Do you know the top 5 reasons residents love <Neighborhood Name>? I would love to share these with you!

[PROFESSIONAL EMAIL SIGNATURE]

Being successful in any industry often comes down to having the right plan. We see too many agents that text, call, and email on day one, but then they don't institute the correct follow up plan and the lead ends up buying a home with another agent. We want you to help that person buy or sell their home. If you implement this follow up plan, I am confident your sales and income will increase and you will be able to help many more people make one of the best decisions of their lives!