



How to Work Leads

Best practices:

- It takes around 10-14 touches to truly work through a lead.
- The best agents use all the contact methods available to them. Calls, emails, and text messages.
- The quicker you make first contact, the greater the chance of success.
- Being first is not enough, being persistent also makes a significant difference.

You have some huge advantages!

- Using the same phone number to call and text a prospect makes a huge difference.
- By using your phone number and name in an email and in text, your name will show up on cell phones when you call or text that person later. This makes it much more likely that a person will respond or answer your call because you are a real person instead of a random company.
- Your ability to send text messages is also a huge advantage. While big organizations can do it, they can't make it personal and they can't link their texts to the same number as they call from.

Sales Process:

The best, most successful agents all tell us the same thing, a consistent and repeatable process for contacting people makes the difference. They use all the tools at their disposal (call, text, and email) and try to work to a clear answer (yes or no).

Day 1:

1. When lead is received, send an email to them with your name and your cell phone number in the email. Do this before calling them and tell them you will be calling them.
2. Call the prospect. If you don't reach them, leave them a voicemail including your name and phone number.
3. Send them a text message letting them know you have reached out, how you can help, and that is quick and easy.

Day 2:

1. Call at a different time of day from first call. If no answer, no voicemail needed

Day 3 or 4:

1. Call the prospect. If you don't reach them, leave them a voicemail reminding them of why you are calling them.
2. Send them an email with the benefits you can provide by just getting in touch.

Day 4 or 5:

1. Text them to see when a good time to connect might be.
2. If not reply, call late afternoon. Voicemail is optional.

Day 6:

1. Send them an email with reminder of why you are calling.
2. Call or text a few hours after email.

Days 7-14:

1. Every other attempt a call or text. At least 2 of each during this timeframe plus one email.
2. Recommend following a call up with a text message asking for a better time.