How To Increase Your Conversion DAILY with CINC

CINC is proud to be your partner, powering your team with the most elite contact management software in the industry. Although the system is complex, we want to make your job easy when it comes to working the platform to get the highest return on your investment (and more money in your pocket)! Introducing our conversions made easy plan! Simply...

1 Spend 60 Min. Prospecting.*

And follow Page 1's: **5 Steps to Prospecting Daily**

2 Spend 60 Min. on Follow Up.*

And follow Page 2's: **7 Steps to Follow Up Daily**

3 Repeat at Least 5 Days a Week!

Consistency is key to building rapport & converting your leads

Let's get started...

*We encourage at least 60 minutes for both prospecting and follow up each day. It can be split into smaller 30-min timeblocks if preferrred.

Last Revised: 7/14/16

Your One-Time SystemSetup

Before you dive into the daily process of prospecting and follow up, it's important to setup your system and preferences for all users. Follow these **5 simple steps** to setup your platform for the most conversion success.

1 Know Your Options

Your Lead Routing Options!

You have a TON of options when it comes to assigning leads in your platform. You can route leads based on the inclusion or exclusion of location, price, source or more.

Our best advice is to get with your CSA to discuss what you'd like lead routing to look like in regards to what agents get what type of leads, weighting scale, etc and they can help you configure the system so it works best for you.

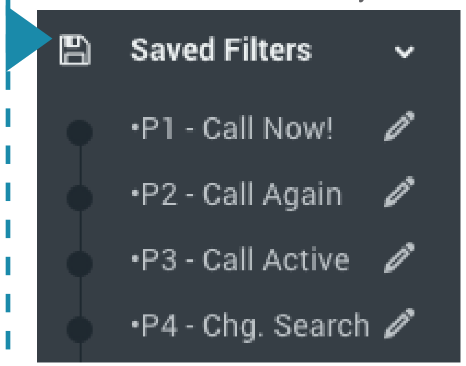
Additional Options...

- Use "**Switchboard Sarah**" to increase contact in first 5 minutes. Sarah calls the agents and then connects the agent to the lead.
- Use "**Agent Reassign**" to automatically reassign leads within your desired timeframe of no contact. Great for enhancing agent activity.

2 Check Your "P" Saved Filters

Check Your Saved Filters

- Ensure your system has all four "P" saved filters enabled in your account



What Do the Filters Include?

P1: Pipeline = New Lead
Registration Date = Beg. of Time

P2: Pipeline = Attempted Contact
Registration Date = Last 14 Days

P3: Pipeline = Attempted Contact
Registration Date = 15 to 5000
Last Login = Last 30 Days

P4: Pipeline = Attempted Contact
Registration Date = 4 to 7
No "Custom Search" Label*

** See step 4 for label setup*

3 Set Your Labels

How Do You Use Labels?

Labels can be created to organize and/or group leads into a similar situation, status, etc that the system doesn't do automatically through filters.

What Labels Should We Create?

Labels will be unique to each team and or platform. Some common labels are:

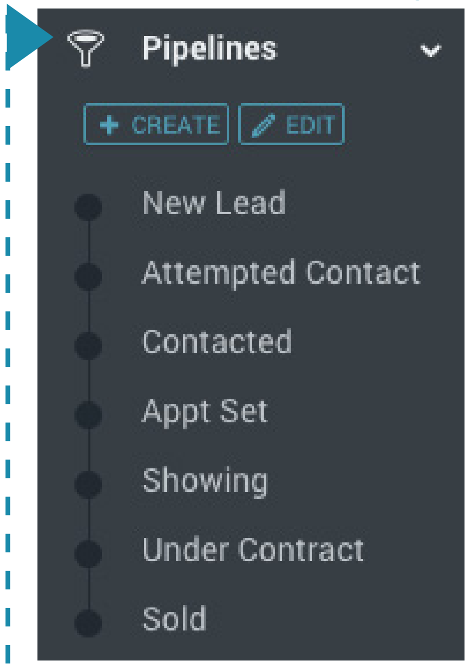
- Situation Labels (Credit Repair, Looking to Rent, Renting, Investor, Relocation, Retirement, etc)
- Operations Labels (Custom Search, Agent SOI, Flag, etc)
- Objection Labels (Has an agent, Is an agent, Lender, Low Price, Buy Out of State, Poor Credit, Couldn't Sell, Already Bought, etc)
- Lender Labels (Qualified, Not Qualified, Turndown, etc.)
- Trigger Labels (START–bad no. drip, STOP–bad no. drip, etc)
- Preferred Contact Labels (call, email, text, morning, night, etc)

4 Check Your Pipeline

Ensure Your Pipeline Is Set

The pipeline organizes your database and it's IMPORTANT that every lead is assigned to the correct stage. You can add additional stage to the pipeline, but the stage MUST occur for every buying scenario.

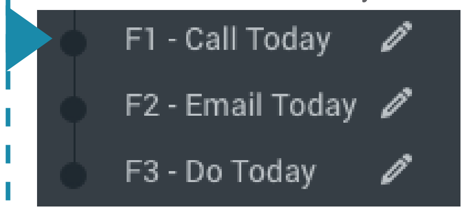
What Are the Pipeline Stages?



5 Create "F" Saved Filters

Check Your Saved Filters

- Ensure your system has all three "F" saved filters enabled in your account



What Do the Filters Include?

F1: Call Today
- Next Reminder Type = Call
- Next Reminder Due = Today or Overdue

F2: Email Today
- Next Reminder Type = Email
- Next Reminder Due = Today or Overdue

F3: Do Today
- Next Reminder Type = Other
- Next Reminder Due = Today or Overdue

5 Steps to Prospecting Daily

Call All Leads In 5 Min.

Did You Know?
- The odds of qualifying a lead is **21 times greater** in 5 minutes versus waiting 30 minutes
- Your odds of qualifying a lead is **4 times higher** when calling within 5 minutes vs waiting 10 minutes

What Do You Say?
A: "Hello! This is ________ with the home search site you just signed up on. I see you're looking in [FAVORITE CITY], what's your situation?"

Other Tips...
- Adjust the PIPELINE stage to "Attempted Contact", this keeps your database organized from the start
- Do NOT leave a voicemail, rather call the lead right back and see if they answer on the second call.
- Do NOT set a reminder on a lead you haven't spoken to. Instead just keep calling who fall in your filters.

Dial All P1–New Leads

"P1–Call Now" Filter Includes...
- "New Lead" status in pipeline
- Any lead "unworked" in system

What If...
- **I don't have a lot of leads in this filter?** GREAT! That means you are...
  1) calling in 5 min and/or
  2) changing the pipeline stage
- **I have a ton of leads in this filter?** Make sure you have...
  1) tried calling the lead AND
  2) changed the pipeline stage

What are "Pipeline Stages"?
This allows you to track your business:
- New Lead (no contact attempted)
- Attempted Contact (call, no answer)
- Contacted (know timing & motivation)
- Appt. Set (ready to meet)
- Showing (looking at houses)
- Under Contract (written contract)
- Sold (closed transaction)

Dial All P2–Attempt. Contacts

"P2–Call Again" Filter Includes...
- Leads you have reached out to and have NOT identified timing and/or motivation
- Leads who registered <14 days ago

Did You Know?
- 8-9a and 4-5p are the best times to call to qualify a lead.
- 8-9a is 164% better than calling at 1-2p, right after lunch.
- 4-5 p is the best time to contact a lead to qualify that lead.
- 4-5p is 109% better than 11a-12p.

Other Tips...
- Change up your calling times. Morning won't work for every lead, so switch it up.
- Call leads 2x/day: morning & night
- Once you TALK to a lead:
  1) Make great notes
  2) Adjust the Pipeline Stage

Check with P3–Last Logins

"P3–Call Active" Filter Includes...
- Leads with unknown or unclear timing and motivation
- Leads in "Attempted Contact"
- Registered 15+ days ago
- Logged in within the last 30 days

What Do You Say?
A: "Hey [FIRSTNAME], this is _______, how are you?"
(...listen/small talk...)

A: "I wanted to check in and see how your home search was going. How can I help?"

...or...

A: "Hey, this is _________ with the home search site you've been utilizing. I see you're looking in [FAVORITE CITY], what's your situation?
(...stop talking and listen...)

Check and P4–Adjust Search

"P4–Chg. Search" Includes...
- Leads in "Attempted Contact"
- Registered 4-7 days ago
- Have no "Custom Search" label

What Do You Do?
For this group of leads, you want to update their saved search to reflect a more accurate range of properties. Those super high/low one viewed properties skew the results, so adjusting the saved search will ensure they will get better properties that meet their criteria in the property alert email.

What Do You Do?
1. Click into the contact record.
2. Select the icon and look at commonalities in their views
3. Determine an ideal price range
4. Now, click on "Saved Search" (top right action bar)
5. Update their saved search
6. Apply desired label to notate action

7 Steps to Daily Client Follow Up

Pipeline Follow Up

Reach Out to Clients In "Showing"

What are "Showing" leads?

Leads in "Showing" Pipeline stage:

- Have a buyer's rep agreement
- Are actively looking to buy a home
- Want to close within 60 days

What is Your Goal?

- Narrow Their Focus: Be diligent in sending them properties that match their search & they'd put an offer on
- Stay Top of Mind: Check in often and listen to their needs
- Add Value: Create a great experience and educate them along the way

Next Step?

- If they write an offer, move to "Under Contract" in Pipeline and turn off property alerts.
- If they decide to put search on hold, move back to "Contacted" and return to nurturing them until ready to buy.

Call And Confirm "Appt Set"

What are "Appt Set" leads?

Leads in "Appt Set" Pipeline stage:

- Have a time set on calendar to meet/ work with you.

What is Your Goal?

- Stand Out: Give them a reason to want to work/meet with you
- Listen & Educate: Understand their wants/needs and educate them on why you are the BEST person to help
- Stay Top of Mind: Remind them often of the appointment and why they do not want to miss it.

Next Step?

- If they meet and are ready to start looking, move to "Showing".
- If no show or are not ready, move them back to "Contacted" and nurture until ready.

Follow Up with Clients In "Contacted"

What are "Contacted" leads?

Leads in "Contacted" Pipeline stage:

- Have had a conversation with you
- You know their timing/motivation
- You chat at least once a month and are waiting until timing is right to buy

What is Your Goal?

- Build Rapport: Buyers work with those they know, like & trust so, get to know your buyers personally.
- Educate Them: Give them a reason to reach out to you because you are the expert not just a resource.
- Be Consistent: When timing is right, buyers act, check in often.

Next Step?

- If they are ready to meet, move to "Appt Set"
- If they no longer respond, move to "Attempted Contact" and start over

Saved Filter Follow Up

What Are "F" Saved Filters?

Any leads in your "F" series filters:

- Should be leads you have talked to
- Asked for you to reach back later
- Have manual reminder added on the set date at one point in time

What is Your Goal?

Working through each Saved Filter:

1. Follow up according to the reminder (ie call, email, other)
2. Mark completed or set new one

Call All F1–Call Reminders

Email All F2–Email Reminders

Review All F3–Other Reminders

Email Follow Up

Respond to Any Email Requests

Why Is This Last?

Your email/inbox follow up should be last on your list of actions unless something is urgent. Often times we reactively respond to email all day and rarely get to our basic prospecting & pipeline follow up.

What Do You Do?

The biggest piece of advice is set your client's expectations. If there's a set time for email follow up or call backs, let your clients know.

Did You Know?

Nearly all email communication is tracked in your CRM, even if you reply from outside of CINC. As long as the initial email is sent from your CINC system, all back and forth communication WILL be tracked in the client's contact record.

DAILY Prospecting & Follow Up Checklist

Today's Date: ____________

CINC

Prospecting

☐ **Call leads w/in 5 Min.**
NOTE: Adjust Pipeline

☐ **Dial 'P1 – Call Now!'**
NOTE: New Leads, Adjust Pipeline

☐ **Dial 'P2 – Call Again'**
NOTE: Attempted Contact, Adjust Pipeline

☐ **Dial 'P3 – Call Active'**
NOTE: Last Login Leads, Adjust Pipeline

☐ **Adjust 'P4 – Chg. Search'**
NOTE: Add Label

...Call Tracking...

Check off all your call attempts and contacts made

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...Appointments Set...

Who / When / Price Point

1. ____________
2. ____________
3. ____________
4. ____________
5. ____________

Dials: ______
Contacts: ______
Apts Set: ______

Follow Up

☐ **Check In with "Showing"**
- Send New Properties
- Check Timeline to Taking Action
- Setup Reminder for Next Touch

☐ **Confirm "Appt. Set"**
- Send/Setup Reminders
- Send Checklist / Prep-list
- Call Next Day Appointments

☐ **Follow Up with "Contacted"**
- Complete Existing Reminder/Action
- Set Face-to-Face Appointment
- Adjust Pipeline / Schedule New Reminder

☐ **Call F1: Call Today**
NOTE: May overlap "Contacted" leads

☐ **Email F2: Email Today**
NOTE: May overlap "Contacted" leads

☐ **Review F3: Other Today**
NOTE: May overlap "Contacted" leads

☐ **Respond to Email Inquiries**
- Ensure you are following up
- Communicate clearly
- Add notes to contact record

..."Under Contract"...

☐ **Complete Contract Needs**
Based on the steps in your Under Contract to Closing Plan or the structure of your office, this stage varies. Whatever your role is for closing process, complete now!

NOTES: