

## Buyer Lead Conversion Plan

Respond effectively to your new buyer leads whether they are from Trulia, or other internet sources. This plan is based on best practices, tips and email scripts shared by top agents.

### Key principles

- Respond immediately to new leads (Your goal is to respond within 5 minutes – have you downloaded the Trulia app to your mobile device yet?).
- Provide information that is helpful and relevant to each person’s needs.
- Reach out in a variety of ways (phone, email, text, Facebook, etc.).
- Take them off the scheduled activities and emails once they engage with you by a phone call, email, or text. Follow-up with them based on their particular situation.

### Three month strategy:

- Phase 1: 7-Day Plan of Attack for Buyers
- Phase 2: 6 Month Nurture Campaign

**Note:** *The goal of these steps is to get your contacts to respond to you. When you are able to engage a lead live, via phone or email, STOP the steps and replace the plan with your personal best practices that match that specific contact’s needs.*

## Phase 1: 7-Day Plan of Attack for Buyers

### Day 1

- Trulia leads only:
  - Check your Trulia Agent App to get a quick view of what the buyer wants from you.
  - Answer your Instant Lead Alerts call.
    - If you have set up [instant lead alerts](#) and receive a Trulia lead, you should receive a call from a (415) area code. If you are the first agent to respond, the system will attempt to connect you directly to the lead. This is a huge opportunity—prioritize these calls!
- If a phone number is provided:
  - Send an introduction text
    - Send a text message
      - *Text: “Hi Dan, I’m in an appointment right now. What can I help you with so I have the information you want on the property when I call you back?”*
  - Make an introduction call
    - Call as soon as possible (within 5-15 minutes). Leave a message if no one answers.
      - *Voicemail: “Hi—this is <your name> with XYZ realty—I just got a request from you for (insert what they wanted from you) from ABC website—and wanted to let you know I’m putting together the information for you. Is there anything else you’d like me to look into about this property or other properties that caught your eye? I’ll send this to you by <insert time> at the latest.*
  - Send an email with the information requested

- Include more information on the property to respond to their request. (Look up the MLS for additional info, agent comments, check property records, or even add personal observations about the property or area. Add something of value!)
  - Include similar listings in the surrounding area.
  - Tell them that you are going to check back to be sure they got all the information they needed (set the expectation)
  - Create a call to action.
    - *Email: "Hi, I received your request on Trulia. I just called and left you a message. It does look like the property is still active at this price \$XXX,XXX and the home owner dues are \$XX. If you're interested, I can show you this home tonight at 3:00 pm since they are reviewing all offers tomorrow at 5:00pm. Can you give me a call back when you see this?"*
- If no phone number is provided.
- Note: Try to find the phone number on Google, Whitepages, pipl.com, etc. If you find a number, follow the steps above.*
- Send an email to respond to the request as soon as possible (within 5-15 minutes)
    - Include more information on the property to respond to their request. (Look up the MLS for additional info, agent comments, check property records, or even add personal observations about the property or area. (Add something of value!)
    - Include similar listings in the surrounding area.
    - Tell them that you are going to check back to be sure they got all the information they needed (set the expectation)
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  - If you are not available to fully respond, send a quick email to acknowledge request.
    - *Email: "Hi Susan, I just got your request from Trulia. I'm on the road right now (or in an appointment right now). What can I help you with so I have the information on the property you want? What's the best number to reach you when I call you back?"*

### Day 3

- Call and leave a message (If you have a number).
- Send an email with a link to a Market Report such as Market Insider on your Trulia One Elite website. (Ideally, this report/market information is on your personal website which engages them with you further).
  - *Email: Hi (name),  
I wanted to make sure you have all the relevant market data as you search for homes in <insert city name>. For a look at the current market, community information, or list of schools & ratings in your area, click the link below to see all the details.  
  
<insert link to a market report or specific community page on your website> I  
  
If there's anything else I can do for you, please let me know.*

### Day 5

- Set up automated listing alerts or adjust existing listing alerts to make sure the properties being sent aren't too narrow or broad
  - Send email that explains either why you set this up for them or explains why you made any changes.
    - *Email: Hi there, I noticed that you had a chance to set yourself up for listing alerts. I just wanted to check in to ensure that you are receiving the type of properties that you want to see. If there is anything else you need, or if you would like some help in adjusting your criteria please let me know. I look forward to helping you.*
- Add Lead to a 6 Month Nurture Campaign

*Note: If your client's listing alerts have vague criteria (e.g., no maximum price, or multiple search areas), try to narrow down the criteria based on homes they may have viewed or saved. If they have too narrow search criteria, try expanding the home price by \$5,000-\$10,000 in either direction (or both) so that they are eligible to receive new listings on a regular basis (this keeps your face in front of them).*

## Phase 2: 6 Month Nurture Campaign

### Week 2- Email

#### **Subject: Let's Look at Homes**

Hi,

Would you like to view some properties this week? What day and times work best for you? I am open this weekend, and in the evenings during this week.

### Week 3- Email

#### **Subject: Finding a Deal on Bank Owned Homes**

Hello,

There are some great deals on bank-owned properties in our market. These homes can be a challenge to find online and I would love to get to work helping you find the best priced homes.

When are you planning to move?

### Week 4- Email

#### **Subject: Deciding what your home is worth**

Hi,

Do you live in this area or are you relocating from somewhere else? Two important things to note:

1. If you live locally and have a home to sell, I am more than willing to give you a free estimate of your home's value.
2. If you are relocating to our area, I have an amazing relocation package to send you.

Which of these do you need at the moment?

### Week 5- Email

#### **Subject: How am I doing?**

Hi,

Are you receiving alerts only the most relevant properties for you? Shall I adjust your alert search criteria for a better match to what you are looking for?

I have an opening tomorrow night if you would like to view some homes.



#### Week 6- Email

**Subject: What you won't find online**

Hi,

Many of my buyers feel that real estate websites only tell half the story about that home. If you are not ready to start touring homes, I have a VIP buyer service you might really appreciate.

I can send you plat maps, tax information, videos, or additional photographs and sale history on any property that is for sale currently or has sold in the past.

Can you think of anything you need right now?

#### Week 7- Email

**Subject: Are you looking to sell?**

Hi,

Just wondering because, but often people use our website to try and gain an understanding of their own home value. Is that the case with you?

#### Month 2 - Email

**Subject: Let's narrow our search**

Hi,

You've received information on quite a few properties over the last few weeks. Sometimes it helps to meet and talk over the key things that are "must-haves" so we can start to narrow our search down. We can do this face-to-face or over the phone. Does Monday at 2:00 or Thursday at 6:00 <insert days and times that work for your schedule> work for you?

#### Month 3 – Email

**Subject: Phone number?**

Hi,

I just tried to give you a quick call to check in and am not sure the number I have for you is accurate. What's the best number to reach you? Just want to make sure you get the exact information you're looking for.

Also, let me know if it's easier to text—I'm flexible!

Thanks,

#### Month 4 - Email

**Subject: I'm really real**

Hi, Even though you found me online—I really am a real person 😊. You might think it's funny I'm pointing this out, but some clients have told me they initially worried about meeting an agent online (could this be a crazy Internet person?) The good news is I'm not! I live and work in <insert area name> neighborhood, my kids go to <insert school> and my favorite restaurant is <insert favorite restaurant> (I'm a sucker for their mac 'n cheese!).

If it helps, here's a little video I recorded so you can get to know me a little better.

<Insert "about me" welcome video">

I love my job—getting to help people find a place they can call home and also making sure their previous home finds happy home owners as well. I'm here to help you in any way I can and would love to know more about your plans for the place you call home.

Thanks again for your interest in your home's current value.

*\*Customization note: insert your local favorites into the text and an "about me" video if you have one.*

#### Month 5- Email (customization required\*)

**Subject: Negotiating on your behalf**

Hi,



When it comes to buying a home, you'll want someone who can negotiate effectively on your behalf. As an expert negotiator, I'll work closely with you to create a unique plan based on your goals and factor in the opportunities in our market. We will get the best price possible in today's market for your future home. I'd be happy to sit down with you and explain how this works at no charge.

P.S. It's free to hire me since sellers pay my commission, not you, the buyer. Pretty good deal, huh? ☺  
<include a reference video with testimonials, site with testimonials—or enter in a testimonial from a past client>

*\*Customization note: Add your own customer testimonials and a link to your Trulia profile reviews if you have them set up.*

#### Month 6- Email

##### **Subject line: How to get help buying a home**

Hey- Have not heard back from you—so I don't even know if what I'm sending is helpful. When you initially reached out to me you were interested in seeing some properties in the <insert area>. Are you still just looking or do you want to move in the next 6 months?

I don't want to bug you, so here's how you can contact me:

<insert agent name>

<insert agent phone number>

<insert agent email>

I would love to help you have a very positive and successful experience buying your dream home. I wish you and your family the best.

Warm regards,

*\*Customization note: Make sure your contact information is correct.*

#### Month 6- Activity

##### **Activity Title: The Buyer Lead Conversion Campaign has ended**

##### **Body of Reminder/Activity:**

The Buyer Lead Conversion Campaign has ended. We recommend that you put this contact on a new campaign.

Suggested campaign: Long Term Buyers (included with Trulia One Elite).

### **Alternate Emails**

#### Email

##### **Subject: Interest rates**

If interest rates change from 3.5% to 4.5%, do you know how that will affect your buying power?

I know that 1% does not seem like a huge jump but it can make a considerable difference in your monthly mortgage payment.

For example, your monthly mortgage payment on a \$300,000 home with a 20% down payment can jump from \$1,078 a month at 3.5% interest to \$1,216 a month if the interest goes back up to 4.5%. Over the life of your loan that can really add up.

Call me today at <insert cell phone> if you would like to know what today's rates are for your financing type.

Hope all is well, have a great week!

#### Email

##### **Subject: Hire a realtor**

Did you know that it is absolutely FREE for a buyer to hire a REALTOR®?



I would love to sit down with you sometime and interview for the position of being your REALTOR. Is there a time this week that would be convenient for you to schedule a meeting?

Additional Resources:

[Seller Lead Conversion Plan](#)

[Create a Custom Campaign](#)

[Manage Your Lead Alert Notifications](#)

Set up Your Trulia One App