

# Lead Management Process – Worksheet

**Step 1: Define Your Lead Types** (ie: Buyers, Sellers, or even more specific such as First Time Buyers, Empty Nesters, Dog Lovers, etc.)

- 1) \_\_\_\_\_ 2) \_\_\_\_\_  
3) \_\_\_\_\_ 4) \_\_\_\_\_  
5) \_\_\_\_\_ 6) \_\_\_\_\_

**Step 2: Define Your Lead Sources** (ie: Realtor.com, Craigslist, My Website, Open House, etc) **and also how this leads comes to you** (ie: email, phone call, in person).

Lead Sources:

Lead comes to me by:

- |           |       |
|-----------|-------|
| 1) _____  | _____ |
| 2) _____  | _____ |
| 3) _____  | _____ |
| 4) _____  | _____ |
| 5) _____  | _____ |
| 6) _____  | _____ |
| 7) _____  | _____ |
| 8) _____  | _____ |
| 9) _____  | _____ |
| 10) _____ | _____ |

## Step 3: Organize Your Lead Process

What Database will you use to collect and maintain your leads? (ie: Top Producer, Boomtown, eEdge, Back-end of My Website): \_\_\_\_\_

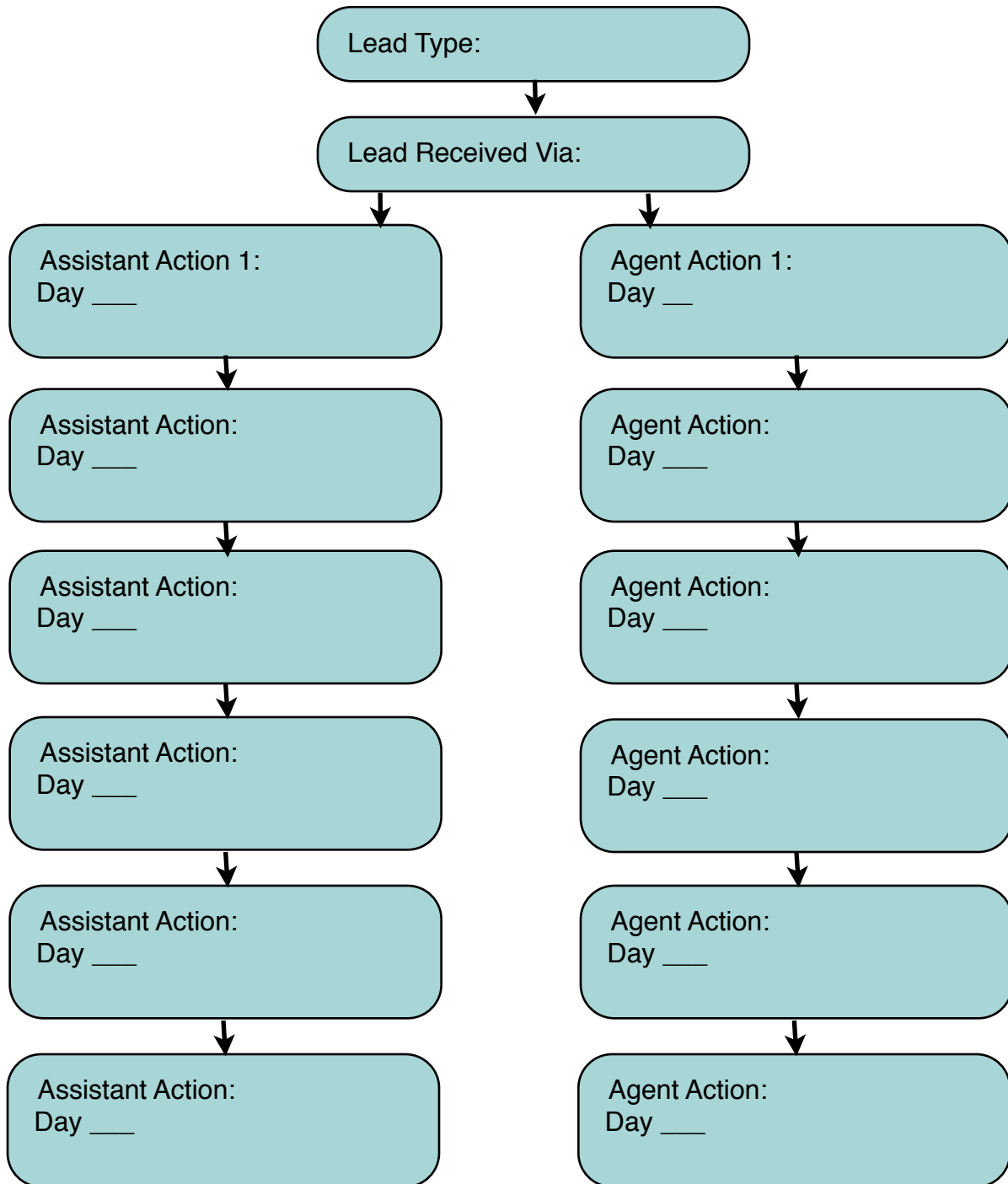
Who will manually enter your leads? (ie: Virtual Assistant, Myself, On-Site Assistant)  
\_\_\_\_\_

How often will your manual leads be entered? \_\_\_\_\_

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## Step 4: Create a Flow

Use the following Flow Charts to document how the flow of how each lead type will work. For accountability, enter who is in charge of which task(s) and how many days each task will be completed from the day that the lead is received. This does not include each actual drip email, which will be documented in the next portion. *Duplicate this page for as many different lead types that you have!*





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## **Bonus Tips:**

- Proactively capture leads on your website by having an irresistible offer. Make sure your offer is graphical and the message is clear. The offer should be something you will provide to them in exchange for their name and email address.
- Make sure your drip emails are personalized, have a clear call to action and are not the out-of-the-box drips that are provided to you through your email service. The drip emails included with your email service are always a good start, but we recommend tweaking and enhancing them to be more personalized and aimed at your target market, community and specific niche.
- Innovative ideas for your drip emails:
  - Include a screen shot of a video that will link to the video on YouTube.com or the video embedded within your website.
  - Include several emails that are just an open ended question to entice the reader to respond.
  - Include your irresistible offers with links back to your website such as a complimentary CMA, relocation package, listings by email, contests, etc.