

Buyer Prospect

Date Received _____
Source _____

Office Appt Set _____
Activity to Generate _____

Home Plate

Name _____
Email _____

Cell _____
First Time to Buy? _____

Current Address _____

Own or Rent _____ Lease end date _____ Move in date _____

When can we meet _____

Home Finder set up in FMLS _____ Docs in Dashboard _____

Contact 1 _____ Contact 2 _____

Contact 3 _____ Contact 4 _____

Contact 5 _____ Contact 6 _____

First Base

Lender _____ Cell _____

Submitting app and docs _____ Approved _____

Approval Received _____ Down Payment _____

Loan type _____ Closing Costs _____

Monthly Payment _____ Move In Costs _____

Days needed for loan _____ Move in Date _____

Second Base

Showing Properties on the following dates:

_____/_____/_____/_____/_____/_____/_____

Third Base

Finance Contingency _____ Due Diligence _____

Appraisal Contingency _____ Closing Date _____

Home Plate

Home Anniversary Postcard set _____ Home Finder set _____

Birthday Postcard set _____ Newsletter set _____

Grouped/Categorized _____ Ask for referral _____

LeadStreet Lead: _____ Date: _____

Good Email: _____ Phone: _____

Step 1 – Call:

1st Attempt: _____
2nd Attempt: _____
3rd Attempt: _____
4th Attempt: _____
5th Attempt: _____
6th Attempt: _____
7th Attempt: _____
8th Attempt: Go For No!

Address – send personal note with business card: _____

Step 2 – **Web Activity**

Did they save a search on their own? Y or N

If No, look at Web Activity and make 2 assumptions – price and location

Step 3 – Set up Saved Search on Your Website/MLS

Click on **“View My Home Finder”** Tab and complete search set up with email notifications selected and search name

Complete: ___/___/___

Step 4 – **Email**

Follow up with address in Subject Line – ASK TO CONNECT or refer to a viewed property

Step 5 – **Turn on Activity Notices**

Make sure you are notified every time a client logs in and saves a favorite

Step 6 – **Build a Powerful Dashboard!**

Load their dash with useful forms, tools, links, etc. A sample contract, a buyer brokerage agreement, Checklist for starting the loan process – link to your lender’s application page, How to Protect Yourself when buying a home, more, RE/MAX Toolkit, Buyer Tour, Home Tour Link!

FOLLOW UP, FOLLOW UP, FOLLOW UP
No great lead system will ever make you money if you
don’t FOLLOW UP!
The FORTUNE is in the FOLLOW UP