

# The Ultimate Guide to **Managing Online Leads**

Learn exactly what to do with the people who come to your business from the web. Unless you're working 100% by referral, you'll probably encounter a few online leads. Still, keep in mind that online prospects should only make up a small part of your lead generation strategy.



# The Online Customer Journey

IMPRESSIONS	→	Eyes on your content.
INQUIRIES	→	Person responding to an offer/ad.
PROSPECT	→	Captured email/phone number.
<b>LEAD</b>	→	<b>Qualified opportunity.</b>
CUSTOMER	→	Someone you do business with.

There are several levels on the online customer's journey. Remember, an inquiry is not a lead!

**What about referrals?**



Referrals come in as leads (qualified opportunities), since they were given to you from a trusted relationship. These are the highest quality leads you can generate.

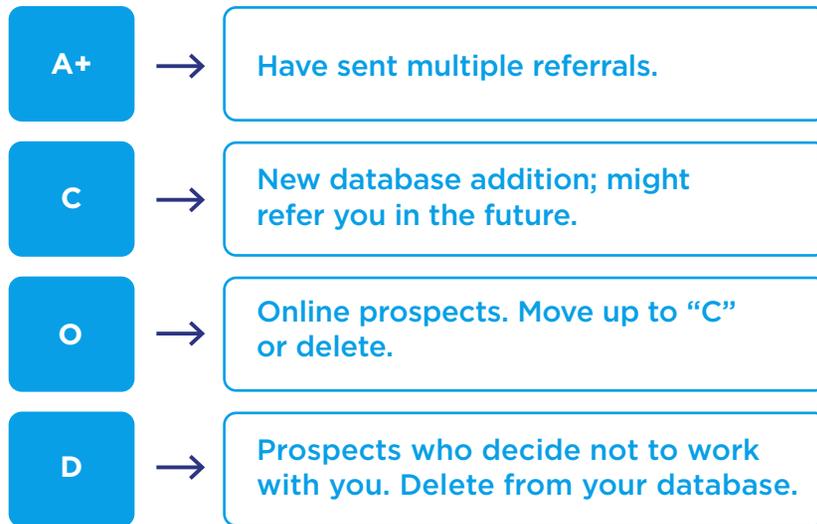


# Importing Prospects to your **Real Estate CRM**

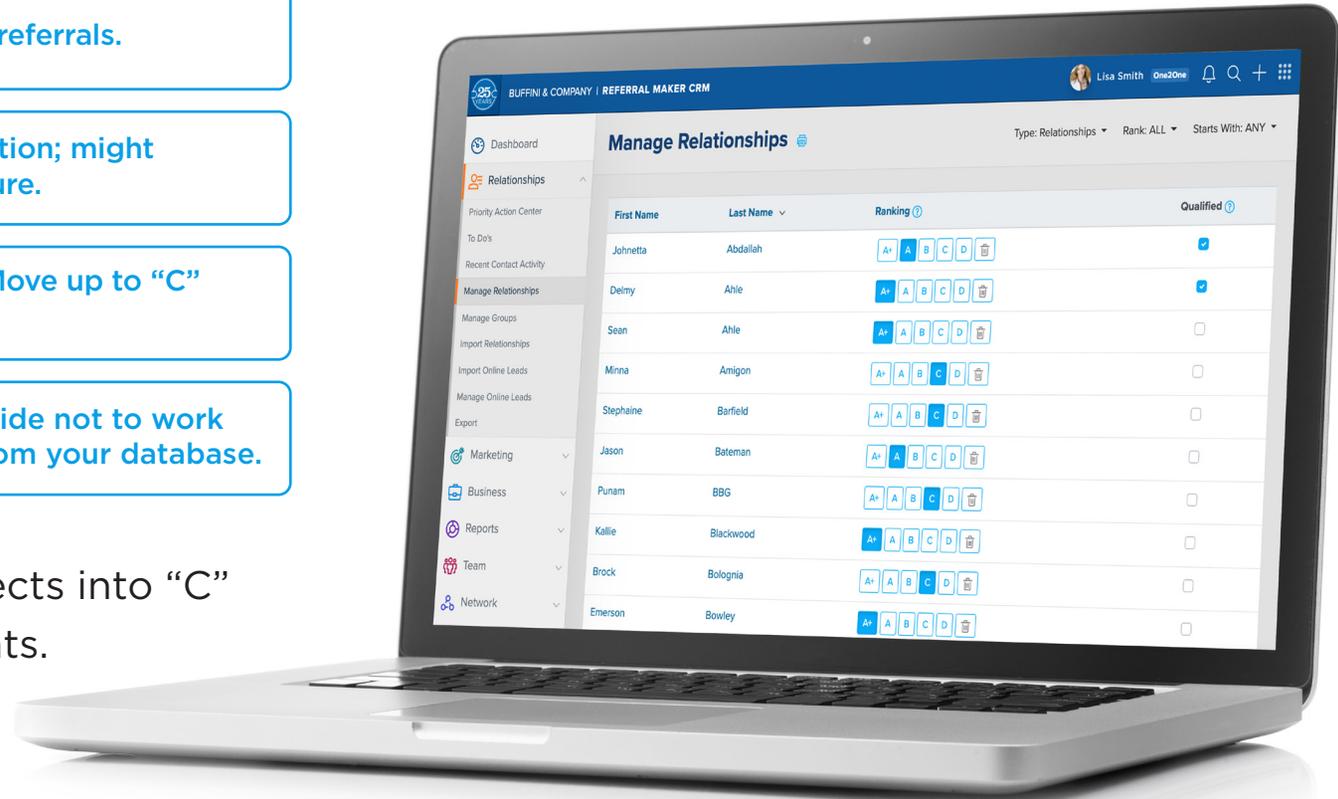
## Client Rankings:

**A+, A, B, C, D** (Delete), **O** (Online)

Keep track of the contacts in your real estate CRM. To identify where they are in the customer journey, we recommend giving them a rank and updating it as the relationship develops.



**Objective:** Turn “O” prospects into “C” clients, and later, “A+” clients.



**Referral Maker® CRM** — This real estate CRM from Buffini & Company lets you rank leads and prospects and track communications all in one place!

# Provide Value

After receiving an online prospect through social media or your website, get in touch quickly by sending a value-add piece that demonstrates your competence and character. Don't forget to follow up!

## What to Send

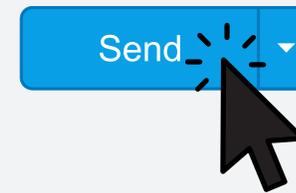
- ✓ General market update.
- ✓ Buyer/seller checklist.
- ✓ Mistakes buyers/sellers make.
- ✓ Value of a real estate agent.
- ✓ Top reasons to buy/sell this season.
- ✓ The value of homeownership.

## Pro-Tip:

Schedule 30 - 60 minutes each day to manage online prospects.

## Need Ready-to-Send Content?

Buffini & Company Referral Maker® PRO Members have access to a wide selection of ready-to-send marketing emails and flyers on the real estate market and buying/selling a home.



# Schedule an Introductory Meeting

For prospects willing to move forward, schedule a face-to-face introductory meeting. This can be done via video conference or in-person.

## Meeting Objectives

- ✓ Introduce yourself.
- ✓ Explain the process and how you work.
- ✓ Discuss their reactions to the value-add piece.
- ✓ Set expectations about the current market.
- ✓ Determine if they are ready to buy/sell.
- ✓ Turn a lead into a customer.



# Deliver Exceptional Service

Once that lead becomes a customer, it's up to you to deliver quality service to transform them into advocates of your business. Here are a few ways to give exceptional service.

## Deliver Pop-Bys

Drop off small appreciation gifts to remind them that you are never too busy for their referrals both during and after the transaction.

## Write Personal Notes

Check in with these clients after the transaction to thank them for their business and congratulate them on the new place.

## Stay Top of Mind

Send them on-going monthly value-add mailers and corresponding eReports on topics like real estate, home improvement and finances to stay top of mind.

## Client Appreciation Events

Invite these clients to appreciation events during the year to thank them for any referrals they send their way.



# Get the Right Tools

## Monthly Marketing Kit

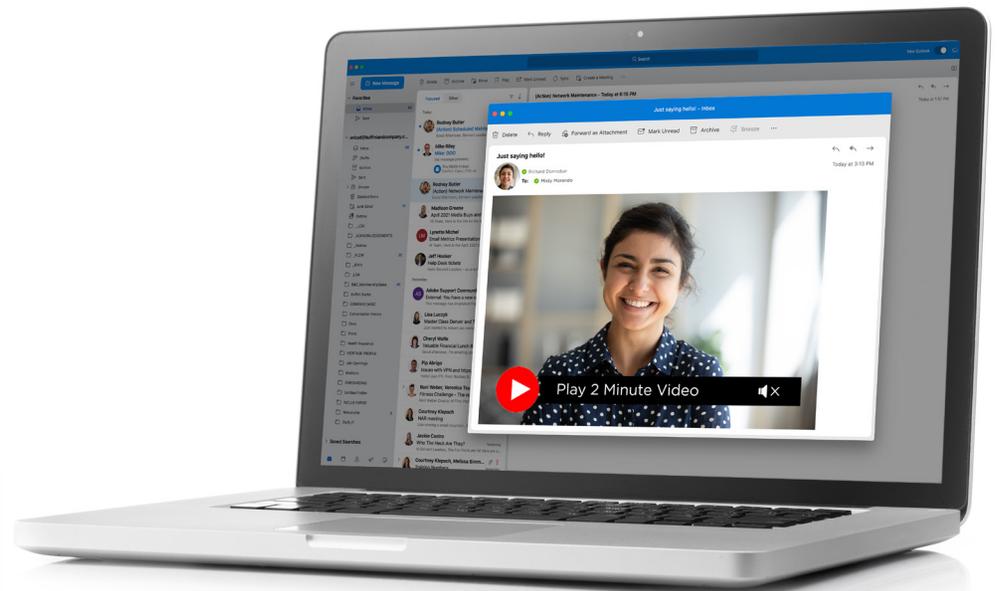
This monthly marketing kit provides ready-made value-add mailers and eReports on a variety of different topics, including real estate, home improvement, finances, personal growth and life hacks. Get personal notecards and creative Pop-By tags to level up your client service.



Join **Referral Maker® PRO** Membership and get the tools you need to get organized and add value to your relationships!

## Referral Maker® CRM is included with your Membership:

- Track, sort and rank relationships.
- Always know who to call, write or visit.
- Add-on Video Messaging and embed personalized videos in your emails or text messages.



Learn more about Referral Maker PRO: [buffiniandcompany.com/rmpro](http://buffiniandcompany.com/rmpro)