

mkt

CRM PROCESS GUIDE

NEW LEADS



Log phone call within 5-15 minutes

NEW LEADS



LEAD ANSWERS

- Refer to scripts for lead type



INFO IS INCORRECT

- Both forms of contact are incorrect
- Move to "Bad Leads" Pipeline



DOES NOT ANSWER

- Refer to scripts for lead type and leave voicemail

MOVE LEAD TO PIPELINE

3-DAY FUP

CONTINUE TO CALL EVERY FEW DAYS

11-DAY FUP



NEVER ANSWERS

ANSWERS & ENGAGES

- Setup property alert, assign to Pond

A



Appt booked or agreement signed. FUP once/week.

B



Could buy or sell within 3-6 months. FUP every 15 days by phone.

C



Could buy or sell 6-12 months. FUP every 30 days by phone.

Prospects



Not A, B, or C but not ready for Pond.

TRASH



Opted out of communication (incl. requests for DNC) No valid contact info.

A DAY IN THE LIFE OF AN ENGYNE CRM USER

Below is a suggested daily workflow for MKT agents to manage their pipelines efficiently. Whether or not these guidelines are followed will be used for evaluating where you sit in lead distribution priority.

> LOG INTO CRM > Pre-Record Daily Voicemail

New Leads

- Move new leads into 3-Day FUP

3-Day FUP

- Select all 3-Day Follow-up Leads and load them into the dialer
- Make calls using scripts for lead type
- If they answer and you have a conversation, move them to either A, B, or C depending on the outcome
- If no answer, drop voicemail & automations will send text and email or move them to 11-Day FUP if they've completed the 3-Day cycle

11-Day FUP

- Select all 11-Day Follow-up Leads and load them into the dialer
- Make calls using scripts for lead type
- If they answer and you have a conversation, move them to either A, B, or C depending on the outcome
- Drop VM & Automations will send text and email or move to prospects pipeline when 11 day cycle is complete

Needs Call (NC) views

- Got to each of your Needs Call (NC) views and load them into the dialer.
- Make calls using scripts for lead type, or updates for A leads
- Automations will remove them from the view after contact attempt has been made and subsequently move them back when its time to follow-up again
- If lead status has changed after contact, move them to the appropriate pipeline

Bonus Opps & Prospects

- When all pertinent follow-ups are complete, check bonus opps then prospects for additional prospecting opportunities

#ProTip

Use this workflow to help create your ideal schedule and time-block for each of the above activities to ensure you are staying top of mind and managing your pipeline effectively while eliminating any time sucking activities. Remember that rejection or rudeness is not personal. Something in their world is hurting. Be glad that you could be their outlet and move on.

LAWS OF THE PIPELINE

NEW LEADS

Default "Waiting Room."
Waiting for a first contact attempt. When you're ready to contact, move to next stage > 3 Day FUP

3-DAY FUP

Where all uncontacted leads begin their journey, Intentional and consistent follow-up for 3 days. 2 Calls, 2 Texts, 2 emails per day for 3 days. No contact? 11-day FUP

11-DAY FUP

Next 11-Days of slowed down cadence. 6 Calls, 6 Texts, 6 Emails total over next 11 days. You will see a spike in contacts/conversations between days 9 and 13. No contact? Move to Pond.

A

A = Active. This is the pipeline for all leads that have a signed listing or buyer agreement or an upcoming appointment. Contact should be made at minimum once a week.

B

Leads that could buy or sell within next 3-6 months. You will contact these leads a minimum of once every 15 days by phone.

C

Leads that could buy or sell 6+ months from now. Cap at 1 year. Contact by phone a minimum of once every 30 days.

Top 50

Ideal/Favorite past clients, top referrers, and people you want to become clients from your SOI and F&F. Contact at minimum once every 30 days.

Top 100

Good past clients you wouldn't mind doing business with again. Local SOI & F&F you want to keep in touch with. Early SOI or F&F you would like to become clients. Contact at least once every 90 days.

General

There are people who aren't ideal clients, live out of the area but could refer, distant SOI like your dentist or friends from high school. No specific commitment for contacting. Might get general emails/updates.

MINIMUM STANDARDS & EXPECTATIONS

3 & 11 DAY FUP CONSISTENCY

It goes without saying that agents in lead rotation are expected to follow the process laid out as they are defined. This means completing all tasks assigned **on schedule** and ensuring lead profiles are as comprehensive and accurate as possible. This includes, but is not limited to:

- Completing all phone calls assigned for new leads until a connection is made or a lead reaches the end of the 11 Day FUP journey. That would mean that if you reach the end of an 11 Day FUP journey with no response that there is a total of 12 phone calls made and recorded in the lead's activity timeline. No exceptions.
- Maintaining a clean 3 Day and 11 Day FUP list where no more than 10% of tasks are overdue at any given point in time. Should an audit of your database be conducted and it is determined that you are 30% or more behind on follow-up tasks, you will be taken out of lead rotation and required to reduce that to at least 10% before you are placed back into rotation.
- **Speed to Lead & Weekend 'Floor Time'**: Speed to lead is incredibly important to the success of conversion. Should you claim a lead (at any given time) you are expected to make the initial phone call within 15 minutes. For weekend lead rotation (*Friday after 5pm - Monday Morning*), you must notify the operations team whether or not you would like to be in lead rotation and for which days. You will be expected to follow-up with those leads within 15 minutes the same as you would during your pre-set "working hours" in Lofty.

MINIMUM STANDARDS & EXPECTATIONS

A, B, and C Pipelines

Similar to 3 and 11 Day FUP, you are expected to maintain a regular schedule of follow up with leads in these pipelines as they fall into your "Needs Call" views. This means:

- Calling A Leads every 7 days
- Calling B Leads every 14 days
- Calling C Leads every 30 days
- You will be held to the same 10% minimum overdue and 30% removed from lead rotation standards as for 3 and 11 Day FUP

Bonus Opportunities

Bonus opportunities are considered equally as important as new leads and you are expected to treat them as such. This means:

- Completing all tasks on schedule, maintaining the 10% minimum overdue standard

Prospects & Pond

When leads have gone stale and you decide to reassign them to the pond. You must do the following before reassignment.

- Ensure the lead is setup on a property report automation
- Update the pipeline to prospects

NEW BUYER LEADS SCRIPT & WORKFLOW

3-Day FUP

INTRO:

“Hey Buyer, I got your request for information on 123 Main Street and I just had a few questions because if you like that property I have a few more like it that I could send you. I’m curious, what is it that you like about that home?”

NO ANSWER: (Voicemail Drop)

“Hi this is [Agent Name] from MKT I got your request for information on 123 Main Street. I just had a couple of questions for you to get your thoughts on this property if you can give me a call back when you get a chance. I’m also going to shoot you a text and an email. If I don’t hear back I’ll try you again this afternoon.”

ANSWER:

One of two things will happen > you will either have an engaging conversation (congratulations, now book the appointment); or you will get the inevitable “Just looking” response. Either way, follow these guidelines.

Most people will be afraid that you’re going to force them to do something they don’t want to do. Frame your responses in a way that gets information out of them without them realizing it. Don’t accept an objection at face value. Try the following:

Just Looking: “I get that. Who doesn’t love looking at homes online? Just out of curiosity do you think you might eventually want to live in this part of town or are you considering other areas?”

Make note of this info, you now know their location preference.

Follow up with: “And I forgot to ask, when are you hoping to be in your new home? Did you have a time-frame in mind?”

3-Day FUP Continued

“Hey that’s a great time frame to consider, what’s significant about that for you? Why _____?”

This will either be a condition or an objection. Things like:

- *Snowbirds*
- *They think XX is the best time to buy*
- *Job changes*
- *etc.*

Either way, dig deeper: “If the perfect home came on the market before then, would you want me to send it to you or would you want to wait until (their time frame)?”

If they say “yes,” it means they’re looking for the perfect home and they don’t think that will happen until the time they’re waiting for.

Ask other questions like:

“This property you were looking at is a 3 bedroom, 2 bath. Is that about what you’re looking for?”

“And the listing price on this one is \$XX, is that more, less, or about the same as what you think your price range might be.”

“Is there anything special you’re looking for like an attached garage or outdoor space?”

If they’re more ready than they thought, book the appointment and move them to A pipeline. If they’re still 3 months+ out, move them to the B or C pipeline based on their timeframe and use their answers to set them on a property alert. Engyne will remind you when to follow-up.

3-Day FUP Continued

Call wrap-up

Make sure to ask about pre-approval. If they haven't been pre-approved. Connect them with preferred lender. If they have, try to get their pre-approval info or make sure they bring it to the appointment.

"This is all great. Very helpful.

NO ANSWER: (Day 1 - Afternoon Follow-up)

If there was no answer to your first call, or call back from the voicemail or responses to text messages and email, you will attempt to call again. If they answer, go back to having the initial conversation. If they don't, leave this voicemail:

"Hi [Name], it's [agent name] calling you back this afternoon like I promised. I was hoping this might be a better time to catch but it looks like you're tied up at the moment. I have another hour or so before I *(step into a meeting, wrap up for the day, etc. whatever works for you)* If I don't hear back from you I'll try you again tomorrow morning."

Day 2 - Voicemail (morning):

"Hi, this is [agent name] again. I wanted to see if I could connect with you this morning before your day gets started because I have these other homes that I want to get sent out but I don't want to send you things you aren't interested in.

It should only take about 3-5 minutes max and then I can get them sent right over to you.

I'll also shoot you a text in case that's easier for you and then I'll try you again this afternoon unless you'd prefer I'd call at a different time.

Either way, just let me know. You can reach me at xxx-xxx-xxxx"

3-Day FUP Continued

Day 2 - Voicemail (afternoon):

Hi, [NAME], this is [YOUR NAME] with [COMPANY] again. Hope your day's been going well!

As promised, I'm following up on my call from earlier.

I just have a couple of quick questions I need to ask you so I can get these homes sent out to you. Including those ones that haven't hit the market yet that I've been referring to.

So feel free to give me a call back at your earliest convenience or shoot me a text and let me know if there's a better time for us to speak. I'll be available this evening until [TIME].

I'll also try you again tomorrow if I don't hear from you as I know things can get hectic.

Either way, just let me know.

You can reach me on my cell at XXX-XXX-XXXX. Again, that's XXX-XXX-XXXX.

Day 3 - Voicemail (morning):

Hi [NAME]! It's [YOUR NAME] at [COMPANY]. Hope you're doing well!

Not sure if you're getting my messages or not and I've got some great homes I'd like to send you (including some that haven't hit the market yet) but I don't want to waste your time by sending you things you aren't interested in.

I just have a couple of quick questions for you and it should only take about 3-5 minutes and then I can send them over to you.

Give me a call back at XXX-XXX-XXXX or text me on that number with the best time for us to speak.

3-Day FUP Continued

Day 3 - Voicemail (afternoon):

Hi [NAME]! It's [YOUR NAME] again.

I thought I'd try you one more time here to see if we could connect and I could get you those homes.

Not sure if you're getting my messages or not and I've got some great homes I'd like to send you (including some that haven't hit the market yet) but I don't want to waste your time by sending you things you aren't interested in.

I just have a couple of quick questions for you and it should only take about 3-5 minutes and then I can send them over to you.

Give me a call back at XXX-XXX-XXXX or text me on that number with the best time for us to speak.

Also, let me know if you're getting my messages because I'd hate for you to miss out on some of these deals if they're a fit for you.

My cell number again is XXX-XXX-XXXX and I look forward to speaking, [NAME]!

Move to 11-Day FUP

At this point, the 3-day follow-up is complete. When you have checked your last call task and the final automations are complete, the lead will automatically move to 11-Day FUP.

11-Day FUP Voicemails

Day 1 – Re-Introduction / Checking In:

“Hey [Name], this is [Your Name] with MKT Real Estate Advisors. I wanted to quickly follow up — I’d reached out last week about some homes similar to the one you were looking at. Not sure if the timing is still right, but I didn’t want you to miss anything that could be a good fit. Give me a call or text when you get a second — my number’s [XXX-XXX-XXXX]. Looking forward to connecting!”

Day 3 – Market Update Angle

“Hi [Name], [Your Name] with MKT here. Just wanted to keep you in the loop — a few new listings popped up this week that remind me of what you were looking for. I’d love to get your thoughts and see if any might work for you. When you get a moment, call or text me back at [XXX-XXX-XXXX]. Hope your week’s going well!”

Day 5 – Personal Touch / Light Curiosity

“Hey [Name], it’s [Your Name]. I was thinking about your home search and wondered if your plans have shifted at all — maybe timeline, area, or price range? Even a quick text back helps me tailor what I send you. You can reach me anytime at [XXX-XXX-XXXX]. Talk soon!”

Day 7 – Friendly Nudge / Missing Out Tone

“Hi [Name], [Your Name] with MKT. I didn’t want you to miss out on a few homes that have gotten a lot of attention — they check some of the boxes from what you’d asked about. Give me a quick call or text when you can so I can make sure you see them before they’re gone. Again, it’s [XXX-XXX-XXXX].”

Day 9 – Re-Engagement / “Still Active?” Check

“Hey [Name], it’s [Your Name] with MKT. Just checking in — are you still actively looking, or should I pause the property alerts for now? Totally fine either way, I just want to make sure I’m being helpful. You can call or text me back at [XXX-XXX-XXXX]. Thanks!”

Day 11 – Last Touch Before Pause

“Hi [Name], [Your Name] here. This will be my last follow-up for now — I know how busy things get. If you’re still in the market or want me to send updates from time to time, just shoot me a quick text. Otherwise, I’ll step back until you’re ready. My number’s [XXX-XXX-XXXX]. Take care!”

CONVERSATIONS FOR SOI:

Your Sphere of Influence Falls into 1 of 3 Categories:

1. Homeowner
2. Renter
3. Unknown

Your sphere of influence lead types should reflect this with either "Buyer, Seller, or Other."

Tactic overview:

You have 2 goals: New business and/or referrals. You want to go for both.

Use this tactic every 6-12 months, making sure you change up the message slightly each time.

Get straight to the point but DO NOT go in for the "kill" too quickly.

Leverage Curiosity.

CONVERSATIONS FOR SOI

Homeowners

Homeowner Reports

“Hi [Name], it’s [Your Name]. How are you doing? {Insert a small amount of rapport-building}

The reason I’m reaching out is because the market has been {talk about current market conditions i.e., interest rates, time of year, election season etc. whatever is affecting the market at the moment}. I’ve been putting together Seller Report’s and market updates for [insert neighborhood] and I immediately thought of you guys since you’re also in the area.

It’s a monthly email that keeps you updated on your home value and some useful financial information so you can keep up with whats going on in your neighborhood. Do you have 3-5 minutes for a quick chat so I can get one set up for you?”

Questions to ask

Have you made any updates or changes to the home since we last spoke?

Have you done anything cosmetically to the home? (i.e. New Paint, New Carpet, New Windows, etc.)

Is anything starting to have issues that may require repair soon? (i.e. Air Conditioning, Plumbing, Electrical, etc.)

Is there anything else you think I should know about that you think could impact the value of the home?

Out of curiosity, I have a few clients looking for homes in your neighborhood...do you know of anyone that might be open to considering strong offers on their home if they could get the price they wanted for it?

Referral request:

Not a problem, [Name]. It was great to connect with you again and I’m glad you’re doing well. Out of curiosity...who do you know that WOULD find a report like this valuable? Who do you know that’s talked about selling or moving?

CONVERSATIONS FOR SOI

Renters

Renter Conversation

“Hi [Name], it’s [Your Name]. How are you doing? {Insert a small amount of rapport-building}

The reason I’m reaching out, Name, is because [interest rates have dipped down a little/are still way down from their historic levels/have really stabilized] and a lot of our clients who had been renting have been moving into homes for close to what they had been paying in rent.

I was in the process of putting together a Buyer’s Report for some of my clients and I immediately thought of you guys. I don’t know whether you’ve ever thought of purchasing a home, but either way, this is a powerful report that shows you what you could afford to purchase for what you’re currently paying out in rent.

I’ve started to put one together for you and I have a couple of quick questions I need to ask so I can finalize it. Do you have 3-5 min so I can get this sent over?

Questions to ask

Have you given any thought to where you’d like to move if you purchased a home?

What would you want in a home? How many beds/baths? What other features would be important to you? Do you have a preferred style of home (i.e. ranch style, modern, single-story, etc.)?

Have you considered [COMPLIMENTARY NEIGHBORHOOD] as well?

If you did purchase something, when would you like to be able to buy a home?

And what are you currently paying in rent each month? Does that include all utilities or is that separate?

And, last question, do you have anything saved up for a down payment or could you come up with anything for a down payment? Don’t worry if you don’t as there are a lot of financing options available today. I just want to make sure I get you accurate info.

Unknown Conversations:

When reaching out to people who you are unsure of whether they rent or own, simply assume they are OWNERS and then adjust course if they say they rent.

You can even ask “You guys own, right? Or do you rent?”

If they say rent, you don’t want to make them feel weird about it. “Oh that’s great, now is a great time to buy because...” Just shift gears and spin it into a positive thing. Make it the *better* answer.

CONVERSATIONS FOR PAST CLIENTS:

Past Client (now homeowners:)

Past client conversations will be similar to Sphere of Influence homeowners where you make a call, build a small amount of rapport, and offer a Seller Report.

“Hi [Name], it’s [Your Name]. How are you doing? {Insert a small amount of rapport-building]

The reason I’m reaching out is because the market has been {talk about current market conditions i.e., interest rates, time of year, election season etc. whatever is affecting the market at the moment} and a lot of our clients have been wondering how their home values have been impacted. Whether you’re selling or not this is a helpful tool to keep you informed on your home’s value and whats going on in your neighborhood so you can make smart decisions.

I started to put one together for you and I have a few questions I need to ask so I can finalize it. Do you have 3-5 mins so I can get this sent over to you.

Questions to ask

Have you made any updates or changes to the home since we last spoke?

Have you done anything cosmetically to the home? (i.e. New Paint, New Carpet, New Windows, etc.)

Is anything starting to have issues that may require repair soon? (i.e. Air Conditioning, Plumbing, Electrical, etc.)

Is there anything else you think I should know about that you think could impact the value of the home?

Out of curiosity, I have a few clients looking for homes in your neighborhood...do you know of anyone that might be open to considering strong offers on their home if they could get the price they wanted for it?

Referral request:

Not a problem, [Name]. It was great to connect with you again and I’m glad you’re doing well. Out of curiosity...who do you know that WOULD find a report like this valuable? Who do you know that’s talked about selling or moving?

CONVERSATIONS FOR SOI & PAST CLIENTS

Add'l touches

Simple Items of Value for SOI

- Monthly Video Market Updates
- Annual CMA
- Quarterly list of homes that have sold in their neighborhood - 4 Touches
- Invitation to grab coffee/lunch/drinks, etc.
- Just listed/just sold updates for their neighborhood
- Invitations to Client appreciation events
- Comment on their social media posts & occasionally send private message

SPHERE OF INFLUENCE

PEOPLE PROMPTS

Family & Close Friends

- Immediate family (parents, siblings, spouse, children).
- Extended family and in-laws you keep in touch with.
- Closest friends — the ones you text, call, or see regularly.
- Your children's friends' parents or teammates' parents (if applicable).

Local & Community

- Neighbors (current and former).
- Friends or acquaintances from school, sports, or kids' activities.
- People from your place of worship or volunteer organizations.
- Local business owners or professionals you see often (barber, trainer, favorite restaurant owner, etc.).
- Service providers you trust — mechanic, dentist, accountant, realtor, etc.

Professional Network

- Current coworkers and teammates.
- Former colleagues, managers, and mentors.
- Current and past clients or customers.
- Vendors, service providers, or partners you do business with.
- Members of professional or industry groups.

Shared Interests & Connections

- Gym or fitness friends.
- People you travel, golf, or attend events with.
- Friends from clubs, hobbies, or special interest groups.
- Old friends from High School or College
- Anyone who would recognize your name — even if you haven't spoken recently.

LEAD SOURCE GUIDELINES

Met at Open House

Team Listing

Source = Open House
Tag = Team Open House

Agent Listing

Source = Open House
Tag = Agent Sphere Open House

Outside Listing

Source = Open House
Tag = External Open House

Website



Source = "Website" **Tag** = Team Lead

Google



Source = "Google" **Tag** = Team Lead

Walk-in



Source = "Walk-in" **Tag** = Team Lead

Sign Call



Source = "SIGN_CALL" **Tag** = Team Lead

FARM



Source = "FARM" **Tag** = Team Lead

Team Event



Source = "COMPANYEVENT"
Tag = eventsource (i.e., Summer Picnic)

LEAD SOURCE GUIDELINES

MK Refferal

MK Sphere

Source = Sphere
Tag = MK Sphere

Past Client

Source = Past Client
Tag = MK Past Client

Agent Sphere

Personal Sphere

Source = Sphere
Tag = [Your Name] Sphere

Team Lead Turned Sphere

Source = Keep Original Source
Tag = [Your Name] Sphere

** Also pin a note indicating that this is a repeat client whom you've previously served thus now making it your sphere. **



LEAD SOURCE GUIDELINES

AGENT SPHERE GUIDELINES

What qualifies as your sphere?

Any client personally known to you whether it be a friend, family, previous coworker, etc. that had not previously done business with MKT.

Any client or referral that works with you on an additional transaction after an initial one.

For example, even if it originally started as a team lead, it will be your sphere the next time they do business with you or if they refer a family or friend.

The one exception would be simultaneous deals at the origin. For example, if you are given a team lead that buys and sells in the same year, both of those deals would be paid out as a team lead.