

*JULIE DOWNEY:*  
**I LOVE COACHING-**  
CENTURY 21 SCHEETZ

Follow up  
Systems that  
elevate your  
client experience

# How Systems elevate you and the experience clients have with you

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Repeatable – same experience each time

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Efficient – makes sure you don't miss anything important

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Saves you time – Templates

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Keeps you ahead of the client, instead of behind

# Today's agenda

Identify the  
most important  
systems

Tools for  
implementation

# Most important follow-up systems:

Seller Management


Buyer Management

Lead Generation

# Seller WEEKLY Update

 New Listings

 New Pendings

 Showing numbers for the week

 Feedback from showings

 Online hits

 Any special marketing you're doing: Calls, mailers, emails, social blasts, open houses, etc.

# Tools for Seller Update- WEEKLY

- ▶ Saved searches for every listing – MLS
- ▶ Broker Bay/Showing Time – Analytics
- ▶ Broker Bay/Showing Time – Feedback
- ▶ Web sites, broker, etc
- ▶ Word document to create your template
  - ▶ Week 1 (explain what you're watching and why)
  - ▶ Each week after
- ▶ Email to deliver – time block every week (Monday at 1pm)

# Buyer WEEKLY Update



New Listings



New Pendings



Showings per listing in their price point



Average DOM



Closed in past month List to Sale Price



Interest rates, sales price – one line of relevant market information

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# 32 Touch Annual *Marketing Plan*

1

## Every Month



Mail a postcard, letter or other marketing piece that promotes you as the EXPERT or AUTHORITY= 12 touches

2

## Every Month



Send a mass email to everyone in your database. Provide Value, and a call to action = 12 Touches

3

## 4 times/year



Send a specialized STICKY mailer. Local market update, magnet schedule, Holiday reach outs, or Pop By = 4 touches

4

## 4 times/year



Connect personally once a quarter with every person in your database. Call them to check in, make sure to see them in person, talk to them when you deliver a pop by. 3 reach outs to check in, 1 time a one on one CONVERSATION=4 touches



# Tools for Annual Marketing Plan

- ▶ Email – drafts, and schedule send
  - ▶ Content –follow other REALTORS,chat gpt, keeping current matters
- ▶ Mailers – Canva, Xpress Docs, Title Companies, Lenders, etc
- ▶ “Sticky” Mailer –magnets, give aways, discount codes, etc
- ▶ List of contact information – Excel, CRM (Contact Management)
- ▶ Personal connection - phone call, Pop by, event

# QUESTIONS?

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