

PLAN NAME: **\*2020 Qualify - Action Plan w/Auto-Texts- 3 Calls**PLAN SCORE: **27****PLAN OWNER SETTINGS**

PLAN TYPE: System Plan

TARGET PLAN TYPE: Buyer

DESCRIPTION: 14-day Qualify plan for Buyer leads

SHARING LIBRARY: Not shared

**EVENT TRIGGERS** Auto-Pause plan when prospect replies / sends email Auto-Pause when a call is logged "Talked to Prospect" Auto-Pause plan when prospect changes category. Auto-Pause plan when prospect changes type. Auto-Pause plan when the prospect sends a text to a BoomTown Number**S T A R T**

THIS PLAN DOES NOT AUTO-START

# **1****WAIT** 1 Day Day 1 of Plan**TO-DO**

NA

TYPE: Call

ASSIGNED TO: Assigned Buyer Agent

**DETAILS:** Before call, check to see if e-Alert or email has been opened, if lead has been back on the site or favorited listings, etc. Ask LPMAMA qualifying questions.

<b># 2</b>	<b>WAIT 1 Day Day 2 of Plan</b>
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Do they have an e-alert?

<p><b>IF YES</b> <span style="float: right;"><input type="button" value="NA"/></span></p> <p>Hi {VisitorFirstName}, it's {AgentFirstName} with {CompanyName}. I'd love to set up a few showings for you. What properties interest you the most?</p> <p style="text-align: right;"><input type="button" value="Copy to My Templates"/></p>	<p><b>IF NO</b> <span style="float: right;"><input type="button" value="NA"/></span></p> <p>Hi {VisitorFirstName}, it's {AgentFirstName} with {CompanyName}. I wanted to email you some listings. What neighborhoods are you most interested in?</p> <p style="text-align: right;"><input type="button" value="Copy to My Templates"/></p>
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<b># 3</b>	<b>WAIT 1 Day Day 3 of Plan</b>
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<p><b>SEND TEXT</b> <span style="float: right;"><input type="button" value="NA"/></span></p> <p>The easiest way to search for properties is through our mobile app. Click here to download: {HomeSearchNowApplInvite}</p> <p style="text-align: right;"><input type="button" value="Copy to My Templates"/></p>	
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# 4	WAIT 2 Days Day 5 of Plan
<b>SEND EMAIL</b> <span style="border: 1px solid black; padding: 2px;">29</span>	
<p><b>SUBJECT:</b> {VisitorFirstName}, can you confirm your timeframe?</p> <p>Hi {VisitorFirstName},</p> <p>Thanks for registering on my website {AgentWebsite}. Would you reply to this email to confirm your timeframe for buying?</p> <p>A. You are ready to buy today. B. You are about 3-6 months from purchasing C. Just Looking</p> <p>No matter where you are in the process, I'm happy to answer any questions you have.</p> <p>Have a great {DayOfWeek} {TimeOfDay}!</p> <p>{AgentFirstName} {AgentLastName}</p>	

# 5	WAIT 1 Day Day 6 of Plan
<b>TO-DO</b> <span style="border: 1px solid black; padding: 2px;">NA</span>	
<p><b>TYPE:</b> Call</p> <p><b>ASSIGNED TO:</b> Assigned Buyer Agent</p> <p><b>DETAILS:</b> Script: If you found your perfect home, would you be ready to move? If not, what's holding you back?</p>	

# 6	<b>WAIT 1 Day</b> Day 7 of Plan
<b>SEND TEXT</b> <span>NA</span> <p>I recently sent you an email, is {VisitorEmailAddress} still your current email? Also, do you prefer to be contacted via text or call?</p> <p>Copy to My Templates</p>	

# 7	<b>WAIT 2 Days</b> Day 9 of Plan
<b>SEND TEXT</b> <span>NA</span> <p>Hi {VisitorFirstName} this is {AgentFirstName} from {CompanyWebsite}. I am pulling up some houses in the area that you might like. How many bedrooms are you looking for?</p> <p>Copy to My Templates</p>	

# 8	<b>WAIT 2 Days</b> Day 11 of Plan

**TO-DO**

NA

**TYPE:** Call

**ASSIGNED TO:** Assigned Buyer Agent

**DETAILS:** Follow LPMAMA script. Check to see if eAlerts are still running and being opened and if they have visited the site recently.

# 9

**WAIT** 1 Day Day 12 of Plan

**SEND TEXT**

NA

Hi {VisitorFirstName}, this is {AgentFirstName} from {CompanyWebsite}. I'm sorry we haven't been able to connect. I'm available via phone and email at {AgentEmail}. When is a good time for us to chat about what you're looking for?

Copy to My Templates

# 10

**WAIT** 2 Days Day 14 of Plan

**SEND EMAIL**

NA

**SUBJECT:** Did I drop the ball?

{VisitorFirstName}, have you been receiving my updates?

Checking in one last time to make sure you're getting everything you need from {CompanyWebsiteAsLink}.

Let me know if you don't need me to continue to send listings. I don't want to send you any properties that aren't a perfect fit.

Don't forget that the easiest way to search for properties is through our mobile app. Click here to download: {HomeSearchNowApplnInvite}

Please respond to this email if I can help in any way moving forward.

Best Regards,

{AgentFirstName}

{AgentSignature}

# 11

**WAIT** 2 Days Day 16 of Plan

**TO-DO**

NA

TYPE: Follow-up

ASSIGNED TO: Assigned Buyer Agent

DETAILS: Call/Text(Optional if there's no activity). Check activity and call regarding recent visit/properties viewed.

**FINISH**

AUTO-MOVE?  After the final step, automatically move the prospect to: ~ NA ~

