

SOI/COI 'Sold Activity & Market Report' Procedures (Real Geeks)

The ultimate goal is to have solid follow up systems that add value to your SOI/COI or Past Client database.

Step #1

Import your database of SOI/COI and Past Clients into Real Geeks CRM. **Important Note:** Make sure your RG site is live and not in Development mode. As long as the site is live it will create an account on your RG site so you can login as client to save them searches.

Step #2

Call all your COI/SOI & Past Clients

Here is a Script you can use to call COI/SOI & Past Clients:

Hi **Name**, this is **Name** with **Real Estate Company**. I'm calling you today because I have a lot of friends and relatives like you... asking me to keep them updated on their REAL ESTATE INVESTMENT. My website can do that... I can set you up on a saved **Sold Search** and it will send you Sold properties in your neighborhood as they happen. It will also send you a **Monthly Market Report** of all the Active Properties, ones Under Contract and Sold within the last six months. Is that something you would like me to do for you as well?

Note: Make sure you let them know they will be getting a Thanks For Signing up email from the site and that is you doing this for them.

Step #3

Login as them from CRM & Set them up on a sold search in their neighborhood. The system will automatically also save and send a monthly Market Report based on their saved Sold Search.

Step #4

Make sure you schedule recurring follow-ups in the CRM... 2,3 or 4 times a year. That way you can make sure they are getting what they want and to see if they now anyone you can help with real estate.

A few benefits of doing this:

- Keeping in front of them with something real estate related and value.
- Email alerts will bring them back to your site so they can engage.

- Home Valuation on every detailed page if you have enabled. If they start thinking about selling they will put in their address and the system will send you a (trigger) notification when they do.
- Track all their activity on the site from the CRM.
- Monthly Market Reports have Home Valuation tool and Property Search widgets at the bottom so they can engage more on the site.