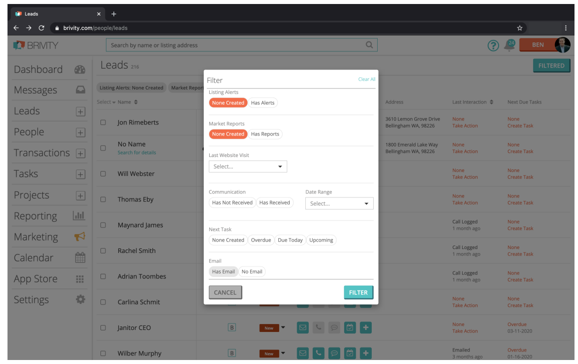
BRIVITY PLATFORM

TOP 10 Steps to Succeed with

Here are 10 things you should do right now to audit your Brivity account, optimize how you use your tools, and help your team be accountable so you can make more money. You may be sitting on a gold mine of leads!



1. **Work New Leads** - Leads are new until an agent works that lead the first time. After that first call, we move the lead to either Watch, Nurture or Hot (if we spoke to them) or Unqualified (if we were unable to reach them). If there are any leads left at the end of the day that are still in the 'New' status, you know that nobody on the team tried to call that lead.

2. **Priority 1 Tasks** - A best practice is to reserve the 1 priority for tasks for any follow up tasks that absolutely positively need to be done on the day you intended to do them. If it's just a general follow up, make it a priority 2 task. Doesn't matter if it happens 15 days for now or 16 days from now. But a priority 1 reminder needs to be done on the day it's due. Go to your overdue tasks and **sort by priority to surface any priority 1 reminders** that were missed.

3. **Recent Website Visitors** - From the Lead or People Index, find the 'Last Visit' column. Click on the column header to put all of the people in your database in order by the most recent visitor to your website. Compare when they most recently visited to the 'Last Interaction' column to see when you last followed up with that lead. DO NOT let leads go weeks or months without communication if they are visiting your website and viewing listings.

4. **Recent Market Report Viewer** - From the Lead or People Index, find the 'Last Viewed' column next to 'Market Reports.' Click on that column header to sort all of the people in your database in order by the most recent person to look at one of the Market Reports you have sent. Determine when you last spoke with this person by referencing the 'Last Interaction' column to see if it's time to attempt to connect with them again!

5. **Hot Leads** - Find your hot leads by going to the leads index and running a filter for a status of 'Hot'. If a lead has a status of 'Hot', that means someone on the team spoke to them at some point and thought, 'This person is going to buy or sell in the next 90 days.' Once you have all of your hot leads in the leads index, sort them by 'last interaction' to see which 'hot' leads you have let sit the longest without any follow up or communication attempts. **Hot leads shouldn't go longer than 7 days without communication of some type.** When you reach out this time, make sure to set a task for when you will next follow up.

6 **Who Needs Listing Alerts** - From the leads or people index, run a filter for: **Intent: Buyer and Buyer/Seller, Listing Alerts: None Created, Email: Has Email**. These people all need a Listing Alert. Maybe you know something about what they were looking for when they came into the database. If you do, use that data to set up a listing alert to send them similar properties. If you aren't sure what they were looking for, set them up with an alert for a major city or county in your area and a generic price range. We will often use an average price point in our market and go up and down 15-20% of that price.

7 **Who Needs Market Reports** - From the people index, run a filter for: **Market Reports: None Created, Email: Has Email, Address: Has Address**. If we have their address and we have their email, and they are not currently receiving market reports from us, they should be. Get them set up with one so long as your MLS covers their address so we have the data to provide to them on your behalf.

8 **Message Center -** On the left hand navigation of Brivity, open the 'Messages' area. This page shows you all of the text communications happening between you, your agents and the people and leads in your database. Review this area looking for:

Speed! How fast are we responding to people

What are we saying? Are your agents equipped to handle common objections. See how they respond when someone says 'we are just browsing'. We know if they don't respond properly via text, they won't respond properly on the phone.

Did something slip by? Sometimes, your agents are busy and when they get that text from a consumer, they think 'I'll get to this later' and then they forget. Make sure EVERY lead is responded to in some manner.

9 **Past Clients** - Are you loving on your past clients? Every year, the majority of real estate transactions come from past clients doing business again with an agent or because of referrals from past clients and people in our sphere of influence. But how often are you communicating with and loving on your past clients? From the people index, run a filter to show you **Status: Past Client**. Then, **sort those results by the 'Last Interaction' column** to see when the last time you made had a meaningful connection with your past clients. Call a few... text a few... love on these people!

10 **Have a Plan for Watch and Nurture Leads** - Your Watch and Nurture leads are people that aren't doing business soon, but if followed up with properly, they will do business with you in the future. Make sure you have an intentional next step with every Watch and Nurture lead. Run a filter for: **Status: Watch and Nurture, Next Task: None Created**. Now figure out what your next step is with these leads. If you never set a task for Watch and Nurture leads....are you actually going to watch or nurture them? No.