TOP 10 Daily Steps to Success

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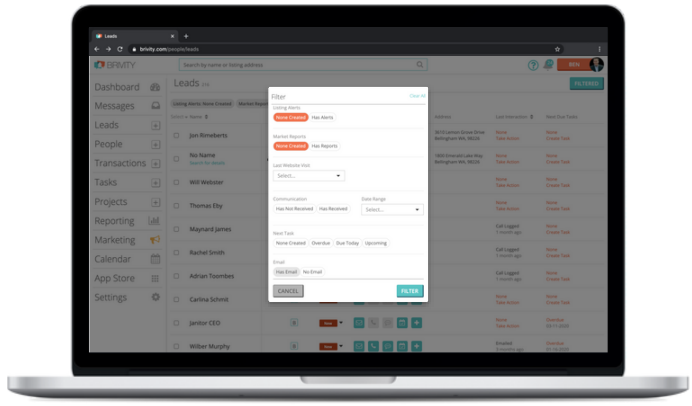
Here are 10 things you should do ***every day*** to succeed with your Brivity CRM – optimize your use these powerful tools, and stay accountable so you can make more money. ***You may be sitting on a goldmine of leads!***



1. **Work New Leads** - Leads are **'New'** until you work that lead the first time. After that first call, update the lead to **Watch**, **Nurture** or **Hot** (if we spoke to them) or **Unqualified** (if we were unable to reach them). *Pro Tip: Try the **LPMAMA Script** and use the **Buyer Info Sheet** to take the best notes.*

2. **Complete Priority 1 Tasks** - **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 Priority 1 reminders that were missed. *Best Practice: Reserve Priority 1 tasks for follow ups 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.*

3. **Recent Website Visitors** - From the Leads or People Index, click the '**Last Visit**' column to sort and surface the most recent visitors to your website. Compare when they most recently visited to the **'Last Interaction'** column. *Best Practice: Recent website visitors should have a last interaction within the last 7 days or a next due task in the future. Unqualified recent website visitors should be called/texted daily.*

4. **Recent Market Report Viewers** - From the Leads or People Index, click the **'Last Viewed'** column to sort and surface the most recent Market Reports viewers. Compare when they most recently viewed to the **'Last Interaction'** column. *Best Practice: Recent Market Report viewers should have a last interaction within the previous 7 days or a next due task in the future. Unqualified recent market report viewers should be called/texted daily.*

5. **Hot Leads** - **'Hot'** leads are generally defined as "**going to buy or sell in the next 90 days**." Sort your **'Hot'** leads by **'Last Interaction'** to see which have gone the longest without any follow-up or communication. *Best Practice: **'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.*

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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**. Use any criteria you know about them to set up a Listing Alert for similar properties. If you aren't sure what they were looking for, set them up with an alert for a major city, county or neighborhood in your area and a price range +/-20% of the average in your market. *Pro Tip: use the* ***Mass Listing Alert*** *feature to set up to 50 people at one time!*

7 **Who Needs Market Reports?** - From the People index, run a filter for: **Market Reports: None Created, Email: Has Email, Address: Has Address**. These people all need a **Market Report**. Get them set up with one so long as our MLS covers their address so we have the data to provide to them on your behalf. *Pro Tip: use the* ***Mass Market Reports*** *feature to set up 50 people at a time, and apply a Smart Radius, guaranteeing at least 15 properties are sent.*

8 **Message Center** - Open the **'Messages'** area in your CRM to review all of the text communications happening between you and the people in your database. *Pro Tip: Don't miss any messages from your Clients and Leads by keeping Brivity Go Handy!*

Review **'Messages'** for:

- **Speed!** How fast are you responding to people?
- **What are you saying?** Are you equipped to handle common objections.
- **Did something slip by?** Sometimes, you're busy and when you get that text from a Client or Lead, you'll think '*I'll get to this later*' and then you forget. Make sure EVERY lead is responded to in some manner.

9 **Past Clients** - Are you loving on your past clients? From the People index, run a filter for: **Status: Past Client**. Then, sort those results by **'Last Interaction'** to see when the last time you made had a meaningful connection with your past clients. *Pro Tip: Send them a Happy Birthday or Home Anniversary with our* ***automated postcards****.*

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 each of them. Run a filter for: **Status: Watch and Nurture, Next Task: None Created**. Now figure out what your next step is with these leads. *Pro Tip: Use the* ***Dialer*** *to knock out these touches quick and easy!*

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