

Goal - what does this accomplish? What should the outcome be?

System - activities, autoplan, tasks/reminders

Models - Mindset around the LGL (scripts, activities, objections)

Tools - scripts, marketing/deliverables, best practices, trackers, data & dialer, CRM

8 open houses per month (2 out of 8 being a Seller Exclusive Open House)

25 door hangers dropped off before or after each open house  
100 dials from circle prospecting prior to each open house (If no drop offs, 200 dials)

**\*Dialer report to be sent to coach weekly prior to 1:1**

**\*ISA support with calling additional list of 100 closest neighbors**

**\*Marketing support with Digital Open House Folder**

**\* Virtual Open House tools via Brivity**

**\*See Open House/Virtual Open House Best Practices**

Entering leads:

Option 1: Manually enter openhouse lead into Brivity. Enter all contact information, notes, tags, lead source, status (Hot, Nurture, Watch, Unqual, etc.), & apply appropriate action plan or task.

Option 2: Use /OpenHouse feature for open house sign in sheet (Auto plan applied)

Follow up TASK Best Practices: \* This will be in the instructions and notes within the auto-plan in Brivity

- Set follow up activity task on a specific date (priority 1) \*apply recurring follow up task
- Set follow up activity task on a general day in the future (priority 2) \*apply recurring follow up task
- Set follow up activity task at a future date with the prospect not expecting follow up (priority 3) \*apply recurring follow up task

## **Promotion & Process**

Day 0: Select an Open House

- Apply "Open House Promotion" auto plan

Open House Promotion Auto Plan:

Day 0:

Task - To do: Order circle prospecting call list

Task - To do: Gather photos, description, & MLS link & go to portal and log in. Click "Marketing Materials Request Form" on your team's dashboard. Complete the form by selection Open House Flyer and Call List from the selection available. Provide all information for the property and upload the photos.

Task - To do: Order ISA Calls

Task - To do: Search for open house listing details page on consumer facing brivity site and create SM post & Craigslist post [Instructions: /Share promotion & select platform (FB, Instagram, Craigslist) copy and past link, then post]

Task - To do: Promote open house on social media & craigslist using /share feature in brivity

Day 1:

Task - To do: Promote open house on social media & craigslist using /share feature in brivity

Task - Call: Using mojo call open house circle prospecting list

Task - To do: Place additional open house promotion in yard or attached to sign with open house schedule

Day 2:

Task - To do: Promote open house on craigslist using /share feature in brivity

Task - To do: Verify open house is entered into MLS as open to ensure open house is promoted on all 3rd party sites

Task - To do: Drop off open house invites

Day 3:

Task - To do: Promote open house on social media & craigslist using /share feature in brivity

Task - To do: Compile open house materials and add market reports & neighborhood comps and data to Digital Open House Folder

Task - To do: Drop off any remaining open house invites if applicable

Task - To do: Verify all circle prospecting calls are completed & door hangers are dropped off

## **VIRTUAL OPEN HOUSES**

\*See open house SOP on portal & promote via brivity virtual open house tool

\* Use brivity virtual open house tool <https://info.brivity.com/knowledge/virtual-open>

### Open House Visitors

- Brivity Registration sheet <https://info.brivity.com/knowledge/shortcut-/openhouse-open-house-registration>
- Once registered - simple open house follow up auto plan assigned
- Options:
  - 1) Good connection during open house (set up on property alert or market report)  
Manual tasking for follow up as necessary
  - 2) No real connection during open house [UNQUAL] “Open House Leads” auto plan
- Buyer plan & Seller plan options (see below)

## **Simple Open House Follow Up Auto Plan**

Day 0:

Text: Thanks for attending the open house, {{recipient\_first\_name}}! Let me know if you have any follow up questions about any of the properties you may have seen in the area.  
-{{primary\_agent\_first\_name}}

Email: [Great To Meet You]

Hi {{recipient\_first\_name}},

I hope you had an enjoyable weekend looking at homes! It was really great meeting you and showing you the open house. I have an interactive report of active, pending, & sold homes in the neighborhood where we met. Would you like me to set that up for you?

I can actually set this up in any neighborhood you're interested in. Let me know!

Day 1:

Task - To do: Set up on Market Report around property held open

Task - Apply "Open House Leads - Buyer" auto plan for UNQUAL buyer leads

Task - Apply "Open House Leads - Seller" auto plan for UNQUAL seller leads

Task - Apply "Open House Nurture" auto plan for any Nurture or Watch leads

Task - [HOT NURTURE WATCH] lead = Verify set up on Listing Alert (buyers) or Market Report (sellers) & follow up task as necessary

**Open House Leads - Buyer Auto Plan [\*Already created] - For leads that you didn't really have a great conversation with or still need to engage**

**2 week plan that then flows into a long term follow up plan.**

Day 0:

Text: Thanks again for stopping by my open house yesterday, {{recipient\_first\_name}}!  
Were you able to make it into any other open houses? -{{primary\_agent\_first\_name}}

Text: Oh and did you have any interest in that particular home?

Task: Call to check in and see if they saw any houses that were of interest [LPMAMA]

Day 1:

Task: Call the Open House attendee

Text: I meant to ask yesterday- are you looking for an investment property or home to live in yourself? -{{primary\_agent\_first\_name}}

Day 3:

Text: I forgot to mention... I have access to a great loan program that saves my clients thousands on their closing costs. Let me know if you're interested in hearing more about it! -{{primary\_agent\_first\_name}}

Day 4:

Email: Re: The homes I sent you

Hi {{recipient\_first\_name}},

I emailed over some interesting homes for sale this week!

Did you get them? What did you think?

Day 5:

Text: Hey {{recipient\_first\_name}}, I'm planning some events in a few weeks, and want to make sure I'm available when you need help with any real estate related needs. What's your timeline looking like? -{{primary\_agent\_first\_name}}

Task - Call to see if they plan on seeing any open houses this weekend (offer list)

Day 7:

Email: Area "pocket listings" you won't want to miss

Hi {{recipient\_first\_name}},

I haven't heard from you since the Open House. Maybe this will help - I have a list of "pocket listings". It's a list of **inactive** homes I've personally compiled. These properties are:

1. Homes that are not active but would consider selling
2. Homes that are currently not active, but have been for sale recently (so may still sell)
3. For sale by owner properties

I would love to schedule a time to sit down in the office and show you these homes and see if any of them might fit your needs.

Are you ready for a meeting like that?

Day 8:

Text: Hey {{recipient\_first\_name}}- I have a list of "pocket listings" which is a list of home not on the market but has indicated they might sell. Are you interested in seeing this list?

Day 10:

Email: Did I drop the ball?

Hi {{recipient\_first\_name}},

I don't want to bother, but I pride myself on being great at follow-up and I don't want to drop the ball.

Are you getting my messages?

Day17:

Text: Hi! Are you still looking to buy or sell a home?

Task - Call: Check in and see if they are still searching for homes

Task - To do: Verify Market Report is sending and/ or Listing Alert is active

Task - To do: Apply follow up task (recurring if applicable)

### **Open House Leads - Seller Auto Plan**

Day 0:

Task - To do: look up owner address in Been Verified & update contact record with any missing information

Task - To do: send handwritten note thanking them for stopping by the open house (include your business card)

Day 1:

Task - Create CMA (5-5-5) & email it to prospect. If no email address, drop off CMA at front door

Text: I sent you a report earlier today that I put together showing you what's active, pending, & sold in your area that most closely matches your home. Let me know if you want to go over it in more detail! -{{[primary\_agent\_first\_name]}}

Day 2:

Text: Also, the value I sent you was a range. When are you available to chat so that I can hear about any updates or upgrades you've made to your home since living there?

Day 4:

Task - Call to verify they received the CMA and see if they have any questions (leave a voicemail)

Day 6:

Email: Neighborhood Market Updates

Hi {{[recipient\_first\_name]}},

Did you get a chance to review the market report I sent over with an update of homes in your area that are active, pending and sold? Every time a home sells it affects your home value.

I find that many of my clients, in the same way they check the value of their stocks, also want to know the value of their largest asset, which is typically their home.

Day 9:

Text: Have you had a chance to look at that market report I put together for you? It shows all the current activity around your house including every active home, all the pending homes and anything that's sold in the last 30 days.

Day 12:

Task - To do: Set up on bi-monthly (2xmonth) recurring follow up task

Task - To do: Verify Market Report is sending (frequency every 2 weeks)

### **Open House Nurture Auto Plan**

- Simple Open House Follow Up Auto Plan already applied

- Monthly drip of market reports or listing alerts will be going out

Day 0

Task - To do: Apply recurring task for monthly follow up (call/text/email)

Task - To do: Edit frequency of Market Report or Listing Alert to monthly

Day 15

Email: Market Information

Hi {{recipient\_first\_name}},

I have access to some great reports filled with accurate information regarding the local housing market. Let me know if you're ever interested in receiving additional information about real estate. I'd be happy to send it along!

Day 45:

Email: Checking In

Hi {{recipient\_first\_name}}, I was just in the neighborhood where we first met showing homes and thought about you. Hope all is well! Let me know if you have any questions about the market or if you've seen any homes lately you want additional information about. I'm always happy to help!

Day 75:

Task - To do: Email your favorite market report as an item of value

Day 100:

Task - Call to check in and see if they have any real estate related questions or goals

Day 160:

Email: Have any questions?

Hi {{recipient\_first\_name}},

Just checking in to see if you have any questions about any of the properties you've seen in my emails. Are you still receiving them? I'd be happy to adjust area boundaries, price points, etc.. if you'd find that helpful! Just let me know!

\*Plan will continue to email monthly and task agent for monthly follow up. In addition agents are trained to monitor last visits for any prospects on market reports or listing alerts and following up when they are active.

## **SCRIPTS**

### **Door Knocking**

I'm holding an open house just down the street and I promised your neighbor (insert owner name) I'd personally invite all the neighbors to come and take a look at the house. I have found that people that live in the neighborhood live here because they love it...so as a neighbor you are often one of the best people to talk to as I am committed to finding a buyer for your neighbor!

Do you have any friends, family, or co-workers that might be interested in the neighborhood?

I have also talked to many neighbors that have been surprised to find out what their home might be worth.

Would it be of value to receive a market update for your home?

We often find when one home goes on the market in a neighborhood, 2 more will go on the market within the next 30 days. Which one your neighborhoods do you think are selling in the near future? Have you perhaps given it any thought lately?

(or)

"I'm holding an open house just down the street and promised my clients (insert names here) that I'd invite you to come by and take a look at the house. I have found that people that live in the neighborhood live here because they love it...and it's always nice to have the opportunity to select your neighbors, right?? Would it be of value to you to see what is active, pending, or recently sold in your neighborhood? Most of your neighbors have been asked to be included in knowing what the FINAL SALES PRICE is for the house down the street, would you like to be included in the list?"

(or)

“I’m holding an open house just down the street and I promised my clients that I’d invite you to come by and take a look at the house. I have found that people who live in the neighborhood typically live here because they love it. Is that the case for you??

IF YES = AWESOME, you’re EXACTLY who I’ve been wanting to talk with, this is YOUR opportunity to SELECT YOUR NEIGHBOR, do you have any friends or family who might be interested in living in this neighborhood??

IF NO = Oh gosh I’m sorry to hear that, would you be interested in listing your home and finding a neighborhood more well suited to your style??”

“We’ve already had a lot of interest in the home and I’ve been asked to keep some agents and buyers up to date with any other homes that might be coming on the market in this neighborhood. Have you thought of selling in the next year or so? Do you know if any of your neighbors are thinking about it?”

“Would it be of value to you if I kept you up to date with what is coming on the market around you and what homes are selling for?”

“Would you be offended if I let you know what the home down the street eventually sells for? And how many offers they receive?”

### **Circle Prospecting Script to Neighbors**

#### **[Option 1]**

Bob and Sue (insert seller(s) name here) at 124 Main st. asked me to invite you to an EXCLUSIVE Neighbors ONLY OH this Saturday from 1-2pm.... Are you familiar with their house?

It’s rare to get the opportunity to actually choose your neighbors AND we are offering this opportunity to you..... who do you know that would want to move into this fantastic neighborhood.....

Great, thank you so much for thinking about that! Statistically, WE already KNOW that whenever ONE listing pops up in a neighborhood there are usually 2-3 more that follow within the next 30-90 day SOOOOOO which one of your neighbors do you think it will be?

Which one do you WANT it to be (haha).

Gosh I appreciate you thinking about that.....incidentally have YOU ever considered selling – the housing market is at an all time high and I’m willing to bet you’d get more money for your house NOW than you would have even a year ago.....would it be of value to you to find out what YOUR HOME is worth in today’s market?

Hey no worries at all.....While I realize you have no interest in selling right now, if you WERE thinking about selling or buying or investing for that matter, do you have a RE professional you would use??

I would like to apply for that job – would you be offended if I kept in touch with you??

If no traction there go for ONE MORE –

I completely understand and I’m so glad to hear you’re protected and covered by a professional, especially in TODAY’s fast paced market – OH and ONE MORE THING..... (as you’re turning to leave) MOST OF YOUR NEIGHBORS have asked to know what the final sales price of 123 Main st. is, would you like to be included in that list??

Great what’s the best email address to reach you at.....AND just in case that bounces back what’s the best phone # for you?

### **Circle Prospecting Script to Neighbors**

#### **[Option 2]**

I’m holding an open house in your area at \_\_\_\_\_ and I promised your neighbors (insert owner name here) that I would reach out to you and invite you to stop by and take a look. We know that because you already live in the neighborhood, you probably love it...and may know people that want to live here too. We’d love to have you stop by. In the mean time, do you know of anyone that might be interested in moving here?

We are having a lot of interest in the home already and have been asked to let some of our buyers know if other homes come on the market as well. Have you thought about selling in the near future?

### **Scripts/Dialog during the open house**

#### **Visitors**

Are you out shopping for a home today or do you happen to live in the neighborhood?

#### **If Shopping**

Great. How have you been getting into homes during your search?

Would it be valuable to you if I put together a private tour in one afternoon of all the homes that interest you, whether they are open that weekend or not?

This will give you better overall feel for the market and current values as well.

#### **If A Neighbor**

Great. What street do you live on?

Are you familiar with property values in the immediate area?

Would it be valuable to have a regular neighborhood update emailed to you showing what is on the market, what went into contract, and what sold?

#### **Questions to Win Clients**

What was your name?

What neighborhood do you live in?

“Are you out shopping for a home today, or do you happen to live in the neighborhood?”

“Would it be of value to you if...?”

“Would you be offended if...?”

#### **Getting Contact Information**

-Would it be helpful to have a flyer with the details of this home?

-Would it be helpful to have a floor plan of the home?

-Would you like a quick list of addresses of the other homes on the market with some details and pricing of those homes?

“I have really enjoyed our conversation and would love to continue it. Would that be ok with you?”

-Great, what is an e-mail address that you use so I can send you this report? Thank you, and in case this bounces back, what is a good number to reach you at?

## **Introductory Script #2**

“Are you out shopping for a home today, or do you happen to live in the neighborhood?”

### **They Are a Neighbor:**

“My name is \_\_\_\_\_. What was your name? And your last name?”

“What street do you live on? How do you like the neighborhood?”

“You may be surprised at the value of your home on TODAY’s Market, would it be of value to you to know whether or not your value has increased??”

“Most of your neighbors have asked to be included in receiving an EXCLUSIVE neighborhood report emailed on a monthly basis, would you like to be included in that list??”

“Undoubtedly you already know that keeping in touch with what’s happening to values in your neighborhood is one of the SMARTEST things you can do, right?”

### **They Are Out Shopping:**

“Great! How have you been getting into homes?”

“Would it be of value to you to have a list of all available homes for sale in the neighborhood including the addresses so you can drive by?”

“Would it be of value to you to have a list of the other open houses this in the area this weekend?”

“Would it be valuable to you if I put together a private tour in one afternoon of all the homes that interest you, whether they are open on the weekend or not?”

### **Value Trade Scripts & Powerful Questions**

“Would it be of value to you if...”

“Would you be offended if...”

“Thanks for coming. May I ask your name? Thanks and what’s your phone number?”

“If I found what you are looking for, how would I contact you?”

“If that email bounces back for some reason, what’s the best number to reach you at?”

“I have so enjoyed talking with you and would love to keep in touch. Would it be ok if I called you to continue our conversation?”

“The fact that you’ve stopped by this Open House, CLEARLY ILLUSTRATES your desire to KNOW MORE about your current home’s value.....”

### **Post Open House Phone Call**

**Option 1:** We met earlier today / yesterday at the open house. I wanted to let you know that I did a little digging when I got back to the office and I found several properties in the neighborhood where we met that match your criteria. I know the house you saw today wasn’t quite right, but I think these few others might have some potential. We could get in tomorrow around 4 if that works for you. Why don’t we meet at my office and go from there.

**Option 2:** Thanks so much for coming by my open house this weekend. Did you see any other interesting properties when you were out looking? Well, I got online this morning and found a few other properties that match your criteria in the neighborhood that we met in. I would love to meet with you so I can show them to you.

**Option 3:** I wanted to check in to see how your open house tours went this weekend. Did you see anything that you loved? I like to follow up to see if you toured any homes that you were interested in getting a pricing analysis on? Did you drive by any homes that you still wanted to get into?

**Option 4:** I wanted to circle back around after I had the pleasure of meeting you at the open house at \_\_\_\_\_. I promised I would stay in touch and see what I could do to help with your home search. I made some calls to some potential sellers as well as other agents that might have some upcoming listings. Would it be of value to you if I sent you what I found?

**Option 5:** I wanted to reach out after we met at my open house at \_\_\_\_\_. As I mentioned to you, I really enjoyed our conversation and wanted to continue it. I am committed to helping you find the right home, whether that be this month, this year, or next year. Would it be of value to you if I kept you up to date with what is coming on the market in the neighborhood in which we met?

### **NOTECARD SCRIPTS**

**Option 1:** “Thank you so much for stopping in to my Open House yesterday. It’s always great to meet some of the neighbors. I am committed to selling your neighbor’s home, so please let me know if you think of anyone that might be a great fit. Along the way, if you have any real estate related questions, please don’t hesitate to call me. I’m in your neighborhood almost every day! Look forward to helping out when the time is right.”

**Option 2:** “Just thought I’d send a quick note to check in. We met some time ago at an Open House in your neighborhood. You’ve probably received my emails, seen my neighborhood updates, passed my signs, and met some of the new neighbors I’ve helped into their homes! Please let me know if you have any real estate related questions, are wondering what your home is worth, or might be selling in the next year or so. Always happy to help.”

**Option 3:** “Just wanted to send a quick note. I was in the neighborhood this week and was thinking about you. We met some time ago and I promised to stay in touch in case you

ever thought about selling your home, or in case you had any real estate related questions pop up. Please don't hesitate to call or email me along the way. I'm in your neighborhood almost every day, so just let me know how I can help!"

**Option 4:** "I wanted to send a quick note to thank you for stopping in to my open house this afternoon. I am committed to working hard on behalf of my seller, so please let me know if you think of anyone that might be interested in moving into the neighborhood. Along the way, as your neighborhood expert, I will be keeping you up to date with what is going on in the market. I'll be sending you some updates in the mail, reaching out by phone now and then, and hope to see you in the neighborhood along the way. Please don't hesitate to call or email me with any real estate related questions along the way."

#### **Follow Up Email Templates [In Brivity]**

**Option 1:** "I just wanted to send a quick note to thank you for stopping in to the Open House I was hosting. It was a pleasure meeting you, and as promised, I wanted to reach back out to see how we can help with your home search. Let me know if you saw anything of interest this week or if you drove by any homes that you'd like to get inside of. I look forward to the opportunity of helping you out and keeping you updated on the market."

**Option 2:** "As I promised when we met at the Open House that I was hosting, I wanted to check in to see how your home search was going. I have pulled a few options for you that might work based on what you are looking for. The best homes often sell before they actually hit the market and show up online. Let me know if you are still looking, and I'd be happy to send you a list of the best available homes that you can take a look at."

**Option 3:** "I wanted to check back in with you after you stopped in to the Open House that I was hosting. How is your home search going? A few other homes have come on the market in the area you were looking at since we met. Let me know if you had the opportunity to see those! I look forward to hearing back and helping out in any way possible."

**Option 4:** "We met some time ago at an open house that I was hosting, and we had a great real estate conversation. I wanted to check in to see what your real estate related plans might be for the upcoming year. Are you planning on buying, selling, or investing in real estate? I enjoyed our conversation and would love to continue it."