

New Lead: Website Lead

This follow up campaign is designed to work leads that register organically on your website.

Auto Applied: Below is how I auto apply this smart plan.

Plan Name *

New Lead: Website Lead

Target Lead Type *

Buyer, Buyer & Seller

☒ My Plan

☐ Team Plan

Application Conditions

Auto Apply ☒

When: Newly Created

Source: Website

Clear

Edit

Auto Pause When

☒ The lead responds / reaches out (then

Move to pipe...

Hot

)

☒ An outbound call is logged as "Talked"

☐ The lead's pipeline changes

☐ The tags that triggered the Smart Plan are deleted

☐ The "Source" of the lead changes

PLEASE NOTE: Days later are how many days need to go by before the next automation goes out.

Step 1: Wait 2 mins: Text #1

Hi #lead_first_name#! I see you just created a new account with us to look at houses. I wanted to quickly check in to see if you had any questions or to see if you needed any help with the home buying?

Step 2: Immediately After Last Task: Text #2

By the way, I'm #agent_first_name#. A Realtor with "Brokerage Name"

Step 3: Task Call

(If No Answer)

Voice Message: *Your voice message* (Ex. checking in)

Avoid "checking in"

"would it make sense...."

Step 4: Wait 3 mins After Last Task: Email #1

Subject: Missed call for #lead_first_name#

Hi #lead_first_name#,

Bradley here,

I saw you just created a new account with us and I wanted to see if there were any questions that you might've had or if there were any properties that you were hoping to check out.

PS: I can also create for you an exclusive list of homes tailored to your preferences. Just email me your most important details for a home.

Your Realtor
#signature#

Step 5: 1 Day Later: Text #3 @ 8:17am

Good morning #lead_first_name#! Bradley here again. I wanted to follow up on your new account with us and make sure you didn't have any questions. How's the home search going? Any properties that interest you?

Step 6: Wait 2hrs 10 mins After Last Task: Email #2

Subject: How's The Home ? Search Going?

Good morning #lead_first_name#!

Just wanted to circle back on your new account with us. Are you able to find your ideal home/property? We have some powerful search tools that have access to more information and houses than some of the big-name brand websites out there. So let me know!

PS: if there is anything else real estate-related that you need or any home you'd like to see, please reach out! I'm happy to help?

Bradley,

#signature#

Step 7: 1 Day Later: Email #3 @ 7:17am

Subject: Any Questions #lead_first_name#?

I hope all is well!

I wanted to check in to see if you have any questions so far in regards to the information I sent you on the "Property Inquiry" you sent along with the "Custom Home Search" I set up for you? Is what I am sending meeting your search criteria? Any changes you would like to see?

Again, if you see any properties you would like more information on or go see, I am always available and working.... I take my clients and my career very seriously and here to support in anyway!

Please feel free to reach out anytime if there is anything you need!

Sincerely,

#signature#

Step 8: 1 Day Later: Task Call

(If no Answer)

Voice Message: *Your voice message* (Ex. checking in)

Step 9: Wait 4 mins After Last Task: Text #4

Hey #lead_first_name#, that was me just called. We take customer service very seriously and I'm just hoping to make sure I'm giving you the best help possible. Finding a new home can be very fun and confusing. So if you ever have any questions or want to see a property please feel free to call or text me! I'm always here to help ? -Bradley

Step 10: 1 Day Later: Email #4 @ 9:06am

Subject: How's it going #lead_first_name#?

Hey #lead_first_name#,

Bradley here.

Just wanted to check in and see how the home search is going? Are you finding what you're looking for?

Let me know!

Your Realtor

#signature#

Step 11: 1 Day Later: Text #5

Quick question... Are you only interested in homes in Bellingham? Or are you open to other areas?

Step 12: Immediately After Last Task: Text #6

Also what price range are you hoping to stay in? Or do you still need to talk to a great local lender?

Step 13: 1 Day Later: Text #7 @ 9:06am

How's the house hunting going #lead_first_name#?

Step 14: 1 Day Later: Email #5 @ 1:30pm

Subject: Not Interested #lead_first_name#

Hi #lead_first_name#,

I just wanted to check in and see if you still needed help with your home search. I know you're probably not in any rush. I just want to make sure I'm not stepping on any toes and am being as helpful as possible.

I also sent you a few listings I thought you might like. Did you get them?

-Bradley

#signature#

Step 15: 1 Day Later: Text #8 @ 11:36am

Hope you've had a great day so far #lead_first_name#! I just wanted to circle back and see if you had any thoughts on your timeline that I could quickly make note of? -Bradley

Step 16: Immediately After Last Task: Text #9

Regarding your home search that is 😊

Step 17: 1 Day Later: Task Call

(If no Answer)

Voice Message: *Your voice message* (Ex. checking in)

Step 18: 1 Day Later: Email #6 @ 11:53am

Subject: Update?

Morning #lead_first_name#... Or afternoon? I guess it's still morning lol

I was just hoping to hear back from you and get an update about what's going on? Regarding your home search that is...

My goal is to provide the highest level of customer service and to earn your business for life.

Tell me...How can I best help you with your home search? Or maybe a better question would be. What has been the most difficult thing so far with your home search?

Let me know!

BP

#signature#

Step 19: Immediately After Last Task: Buyer Property Alert

Add Step: Buyer Property Alert

Alert Name: Website Lead - Buyer Alert

Filter Info: Location County:Tarrant, TX; Exclude Zip Codes:76116; Basic info Price:\$500K - \$700K;

Listing Status:Active; Property Type:Single Family Home; Purchase Type:For Sale;

Alert Setting: Frequency: Daily; Schedule: Tue-AM,Fri-AM;

Step 20: Immediately After Last Task: Change Pipeline

Automatically move leads to this pipeline: Cold

Step 21: Immediately After Last Task: Start Smart Plan

Automatically start the following Smart Plan: Nurture: Attempting Contact

Warm: General Follow Up – Buyers

This campaign is designed to follow up with warm leads every 2 weeks for with intention of scheduling an appointment at their convenience.

Auto Applied: Like all of our smart plans (aka follow-up campaigns), this campaign is automatically applied to all our leads that are in our "warm" pipeline in our Lofty CRM See below under "Application Conditions."

Plan Name *

Warm: General Follow Up

Target Lead Type *

Buyer

☒ My Plan

☐ Team Plan

Application Conditions

Auto Apply ☒

When: Conditions Met

Pipeline: Warm

Group: Local Home Buyer

[Clear](#) [Edit](#)

Auto Pause When

☐ The lead responds / reaches out

☐ An outbound call is logged as "Talked"

☒ The lead's pipeline changes

☐ The tags that triggered the Smart Plan are deleted

☐ The "Source" of the lead changes

PLEASE NOTE: Days later are how many days need to go by before the next automation goes out.

15 Days Later: Text #1 @8:30am

Hi #lead_first_name#, I know things are on hold for the moment, but I wanted to check in and see if you needed anything? -Bradley the Realtor

Immediately After Last Task Text #2 @8:31am

Ps, how are you doing?

15 Days Later: Email #1 @8:12am

Subject: Monthly Home Search Check In

Good morning #lead_first_name#,

How is your home search going so far?

Are the homes I'm sending you still match your criteria? Or are there any adjustments to the search that you'd like me to make?

PS: If you'd like to see any homes, let me know, and I'll schedule a private tour for you!

Your friendly Realtor

#signature#

15 Days Later: Text #3 @8:31am

I hope all is well #lead_first_name#! I know you're probably good but I wanted to double-check and see if you needed anything? -Bradley The Realtor

15 Days Later: AI @8:31am (Optional)

Turn on the AI to start suggesting listings to the lead. Or Task it to yourself

15 Days Later: Text #4 @8:31am

Hey #lead_first_name#, I just wanted to check in and see how the home search is going. I know there isn't a ton out there right now... But is there anything I can help you with in the meantime? Anything popped up that you'd like to see? -#agent_first_name# the Realtor

15 Days Later: Email #2 @8:12am

Subject: Monthly Home Search Check In

Hello #lead_first_name#,

I hope all is well with you 😊

I just wanted to double-check on the homes I'm sending you. Do they still match what you're looking for? Any fine-tuning to the search you'd like me to make?

#signature#

15 Days Later: Text #5 @8:31am

Hi #lead_first_name#, how's the home search going? -Bradley the Realtor

15 Days Later: Text #7 @8:31am

Hey #lead_first_name#, have you seen The current market conditions updates? The housing market has gotten very... interesting.

Immediately After Last Task: Text #8 @8:32am

Link to Custom Landing Page

15 Days Later: Email #3 @8:12am

Subject: Friendly Realtor Home Search Check In 😊

Good day #lead_first_name#

I am just doing my monthly home search check-in!

How is your home search going?

Anything you'd like to take a look at?

#agent_name# the Realtor

#signature#

15 Days Later: Text #9 @8:31am

Morning #lead_first_name#, how's it going? I wanted to check in and make sure the homes I'm sending you still match your criteria. Any fine-tuning you'd like me to make to your search? - Bradley The Realtor

15 Days Later: Text #10 @8:31am

#lead_first_name#, do you still need help with finding a home?

15 Days Later: Email #4 @8:12am

Subject: Late Night Home Search Check-in

Good evening #lead_first_name#

Apologies for the late email! Things have just been crazy today...

How's the house-hunting going? Have any questions? Any homes you'd like to see?

Have a good night :)

#signature#

15 Days Later: Text #11 @8:31am

Good Afternoon! #lead_first_name# the Realtor, just doing my monthly check-in? How's the house hunt going? Anything I can do to help?

15 Days Later: Text #12 @8:31am

Hi #lead_first_name#, I wanted to follow up and see where you'd like to go from here? I know it's been a while, is finding a new home still something you're interested in doing? -Bradley

15 Days Later: Email #5 @8:12am

Subject: #lead_first_name#

Do you still need help with buying a house?
#signature#

15 Days Later: ringless voicemail #1 @8:33am

Send a general ringless voicemail on checking in

Immediately After Last Task: Text #14 @8:34am

That was me who just called #lead_first_name#. I wanted to see if you needed anything? – Bradley

15 Days Later: Text #13 @8:31am

Hey just doing my usual check-in ;) Have any thoughts about a new house lately?

15 Days Later: Text #14 @8:31am

Hope you've had a great day so far #lead_first_name#! I just wanted to circle back and see if you like any of the properties I've sent you recently?

15 Days Later: Text #15 @8:31am

Good morning #lead_first_name#! We got some beautiful new homes 🏠 that just came on the market today. Take a look when you have a minute! Link to New Listings Landing Page

15 Days Later: Text #16 @8:31am

Checking back in. Wanted to circle back and see if anything had changed with your search? We're always here to help :) –Bradley

15 Days Later: Change Pipeline To Cold

Hot: General Follow Up - Buyers

This campaign is designed to follow up with hot leads weekly for with intention of scheduling an appointment.

Auto Applied: Like all of our smart plans (aka follow-up campaigns), this campaign is automatically applied to all our leads that are in our "Hot" pipeline in our Lofty CRM "Application Conditions."

Plan Name *

Hot: General Follow Up

Target Lead Type *

Buyer

☒ My Plan

☐ Team Plan

Application Conditions

Auto Apply ☒

When: Conditions Met

Pipeline: Hot

Group: Local Home Buyer

Clear

Edit

Auto Pause When

☐ The lead responds / reaches out

☐ An outbound call is logged as "Talked"

☒ The lead's pipeline changes

☐ The tags that triggered the Smart Plan are deleted

☐ The "Source" of the lead changes

PLEASE NOTE: Days later are how many days need to go by before the next automation goes out.

4 Days Later: Text #1 @8:30am

Good morning #lead_first_name#, Just wanted to check in and see if any properties popped up that you'd like to see? #agent_first_name# the Realtor

5 Days Later: Text #2 @8:31am

Hey just wanted to check in and see how the home search is going. Anything popped up that you'd like to see? -#agent_first_name# the Realtor

6 Days Later: Email #1 @8:12am

Subject: Home Search Check In #lead_first_name#

Good morning #lead_first_name#,

Just seeing how the home search is going. Any questions? Any properties that you want to see?

#signature#

7 Days Later: Text #3 @8:31am

Morning #lead_first_name#, I wanted to check in and make sure the homes I'm sending you still match your criteria. Any fine-tuning you'd like me to make to your search? -Tommy the Realtor

8 Days Later: Task Call #1 @8:31am (Optional)

Leave a general voicemail on checking in

Immediately After Last Task: Text #4 @8:35am

Hi #lead_first_name#, that was me that just called, just doing my weekly check-in. Anything pop up that you'd like to check out this weekend? #agent_first_name# the Realtor

8 Days Later: Text #5 @8:31am

Good morning #lead_first_name#! We got some new beautiful new homes 🏡 that just came on the market today. Take a look when you have a minute!

[Link to New Listings Landing page](#)

8 Days Later: Text #6 @8:31am

How's the home search going #lead_first_name#?

8 Days Later: Task Call #1 @8:31am (Optional)

Leave a general voicemail on checking in

Immediately After Last Task: Email #3 @8:35am

Subject: Missed call for #lead_first_name#

Hi #lead_first_name#, just checking in to see how the home search is going.

Anything that you'd like to see?

#signature#

8 Days Later: Text #7 @8:31am

Morning #lead_first_name#, just checking in to see if you need anything... Want to see some homes 🏡 this weekend? -#agent_first_name# the Realtor

8 Days Later: Text #8 @8:32am

Hey #lead_first_name#, I know you'll reach out to me if you need any help with your home search. I just wanted to check in anyways just in case. Anything I can do for you? Any homes catch your eye? -#agent_name# the Realtor

8 Days Later: Text #9 @8:31am

Morning #lead_first_name#, how's it going? I wanted to check in and make sure the homes I'm sending you still match your criteria. Any fine-tuning you'd like me to make to your search? - Tommy The Realtor

8 Days Later: Text #10 @8:31am

Morning #lead_first_name#! Would you to see home some homes today or tomorrow? #agent_first_name# the Realtor

8 Days Later: Text #11 @8:31am

Hey #lead_first_name#, how's the home search going? -#agent_first_name# the Realtor

8 Days Later: Text #12 @8:31am

Hey #lead_first_name#, Just wanted to check in and see if any properties popped up that you'd like to see? Would you like to schedule some home tours? #agent_first_name# the Realtor

8 Days Later: Email #4 @8:12am

Subject: #lead_first_name#

Do you still need help with your home search?

#signature#

8 Days Later: Text #9 @8:31am

Hey just wanted to check in and see how the home search is going? Anything popped up that you'd like to see? -#agent_first_name# the Realtor

8 Days Later: Text #10 @8:31am

Morning #lead_first_name#! Would you to see home some homes today or tomorrow? #agent_first_name# the Realtor

8 Days Later: Text #11 @8:31am

Good morning #lead_first_name#! We got some new beautiful new homes 🏠 that just came on the market today. Take a look when you have a minute! Link to New Listings Landing Page

8 Days Later: Text #12 @8:31am

Morning #lead_first_name#, how's it going? Wanted to check in and make sure the homes 🏠 I'm sending you still match your criteria. Any fine-tuning you'd like me to make to your search?

8 Days Later: Text #13 @8:31am

How's the home search going #lead_first_name#? See anything ya like?

8 Days Later: Email #5 @8:12am

Subject: Monthly Home Search Check In

Hi #lead_first_name#,

Just checking in to see how your home search is going!

Are you finding what you're looking for?

#signature#

8 Days Later: Text #14 @8:34am

Morning #lead_first_name#! Would you to see home some homes today or tomorrow? My schedule is pretty open this week. #agent_first_name# the Realtor

8 Days Later: Text #14 @8:31am

I know things are a bit crazy right now, but is there anything I can do to help with your home search? -#agent_first_name# the Realtor

8 Days Later: Change Pipeline To Warm

Cold: General Follow Up - Buyer

This follow up campaign is designed to work leads that are putting things on hold, just looking, or are more than 6 months out from buying. It is designed to follow up, nurture, and convert leads into appointments.

Auto Applied: Like all of our smart plans (aka follow-up campaigns), this campaign is automatically applied to all our leads that are in our "Cold" pipeline in our Lofty CRM. See below under "Application Conditions."

Plan Name * Target Lead Type *

☒ My Plan ☐ Team Plan

Application Conditions Auto Apply ☒

Auto Pause When

☐ The lead responds / reaches out ☐ An outbound call is logged as "Talked" ☒ The lead's pipeline changes ☐ The tags that triggered the Smart Plan are deleted

☐ The "Source" of the lead changes

PLEASE NOTE: Days later are how many days need to go by before the next automation goes out.

30 Days Later: Text #1 @8:30am

Hey #lead_first_name#, I know you're not quite ready, but I wanted to check in and see if you needed anything real estate related? -BP

Immediately After Last Task: Text #2 @8:31am

Ps, how are things?

30 Days Later: Email #1 @8:12am

Subject: Monthly Home Search Check In

Good morning #lead_first_name#,

How is your home search going so far?

Are the homes I'm sending you still match your criteria? Or are there any adjustments to the search that you'd like me to make?

PS: If you'd like to see any homes, let me know, and I'll schedule a private tour for you!

Your friendly Realtor

#signature#

30 Days Later: Text #3 @8:31am

I hope all is well #lead_first_name#! I know you're probably good but I wanted to double-check and see if you needed anything? -BP

30 Days Later: Text #4 @8:31am

Hey #lead_first_name#, I just wanted to check in and see how the home search is going. I know there isn't a ton out there right now... But is there anything I can help you with in the meantime? Anything popped up that you'd like to see? -#agent_first_name# the Realtor

30 Days Later: Email #2 @8:12am

Subject: Monthly Home Search Check In

Hello #lead_first_name#,

I hope all is well with you 😊

I just wanted to double-check on the homes I'm sending you. Do they still match what you're looking for? Any fine-tuning to the search you'd like me to make?

#signature#

30 Days Later: Text #5 @8:31am

Hi #lead_first_name#, how's the home search going? -BP

30 Days Later: Text #7 @8:31am

Hey #lead_first_name#, have you seen my current housing market video? The housing market has gotten very... interesting.

Immediately After Last Task: Text #8 @8:32am

Link to Custom Landing Page

30 Days Later: Email #3 @8:12am

Subject: Friendly Realtor Home Search Check In 😊

Good day #lead_first_name#

I am just doing my monthly home search check-in!

How is your home search going?

Anything you'd like to take a look at?

#agent_name# the Realtor

#signature#

30 Days Later: Text #9 @8:31am

Morning #lead_first_name#, how's it going? I wanted to check in and make sure the homes I'm sending you still match your criteria. Any fine-tuning you'd like me to make to your search? -BP

30 Days Later: Text #10 @8:31am

#lead_first_name#, do you still need help with finding a home?

30 Days Later: Email #4 @8:12pm

Subject: Late Night Home Search Check-in

Good evening #lead_first_name#

Apologies for the late email! Things have just been crazy today...

How's the house-hunting going? Have any questions? Any homes you'd like to see?

Have a good night :)

#signature#

30 Days Later: Text #11 @8:31am

Good Afternoon! #lead_first_name# the Realtor, just doing my monthly check-in? How's the house hunt going? Anything I can do to help?

30 Days Later: Text #12 @8:31am

Hi #lead_first_name#, I wanted to follow up and see where you'd like to go from here? I know it's been a while, is finding a new home still something you're interested in doing? -BP

30 Days Later: Email #5 @8:12am

Subject: #lead_first_name#

Do you still need help with buying a house?

#signature#

30 Days Later: Task Call #1 @8:33am

Leave a general voicemail on checking in

Immediately After Last Task: Text #14 @8:34am

That was me who just called #lead_first_name#. I wanted to see if you needed anything? -BP

30 Days Later: Text #13 @8:31am

Hey just doing my usual check-in ;) Have any thoughts about a new house lately?

30 Days Later: Text #14 @8:31am

Hope you've had a great day so far #lead_first_name#! I just wanted to circle back and see if you like any of the properties I've sent you recently?

30 Days Later: Text #15 @8:31am

Good morning #lead_first_name#! We got some beautiful new homes 🏡 that just came on the market today. Take a look when you have a minute! Link to New Listings Landing Page

30 Days Later: Text #16 @8:31am

Checking back in. Wanted to circle back and see if anything had changed with your search? We're always here to help :) -BP

30 Days Later: Change Pipeline To Nurture

Website Activity: Automated Showing Request

Auto Applied: Below is how I auto apply this smart plan.

Plan Name *

Website Activity: Automated Showing Request

Target Lead Type *

All

☒ My Plan

☐ Team Plan

Application Conditions

Auto Apply ☒

When: Has Certain Behavior

Triggering Behaviors: Request Showings

[Clear](#) | [Edit](#)

Auto Pause When

☒ The lead responds / reaches out (then

No action

)

☒ An outbound call is logged as "Talked"

☐ The lead's pipeline changes

☐ The tags that triggered the Smart Plan are deleted

☐ The "Source" of the lead changes

PLEASE NOTE: Days later are how many days need to go by before the next automation goes out.

Step 1: Wait 2 mins: Text #1

Hi #lead_first_name#! I just got your showing request to see #trigger_behavior_listing_addr#. Awesome! When were you hoping to see it? -#agent_first_name# the Realtor

Step 2: Wait 1 min: Email #1

Subject: I got your showing request for #trigger_behavior_listing_addr#

Hi #lead_first_name#!

I just got your showing request to see #trigger_behavior_listing_addr#.

What day and time were you hoping to see it?

-#agent_first_name#

#signature#

Step 3: Immediately After Last Task: Task Call

Voice Message: *Your voice message* (Ex. i just got your showing request)

Step 4: 1 Day Later: Text #2 @ 8:30am

Morning #lead_first_name#, I wanted to circle back regarding your tour request to see #trigger_behavior_listing_addr#. When were you hoping to see it?

Step 5: Immediately After Last Task: Task Call

Voice Message: *Your voice message* (Ex. i just got your showing request)

Step 6: Wait 4 mins: Email #2

Subject: Missed Call #lead_first_name#

Morning #lead_first_name#,

I wanted to circle back regarding your tour request to see #trigger_behavior_listing_addr#.

When were you hoping to see it?

-#agent_first_name#

#signature#

Step 7: Wait 4 hrs 10 mins: Text #3

Let me know!

Step 8: 1 Day Later: Text #4 @ 9:30am

Alright #lead_first_name#, I'm just gonna take it that you're no longer interested in #trigger_behavior_listing_addr#. No problem! If you see any other homes you'd like to check, call or text me and I'll get them set up for you! Have a great day! 😊

Step 9: 1 Day Later: Other

To do: Remove showing requests from details and DELETE this smart plan so it'll trigger again for future requests.

Website Activity: Favorited A Listing

Auto Applied: Below is how I auto apply this smart plan.

Plan Name * Target Lead Type *

☒ My Plan ☐ Team Plan

Application Conditions Auto Apply ☒

When: Has Certain Behavior Source: Any Triggering Behaviors: Favorite Listings Clear Edit

Auto Pause When

☒ The lead responds / reaches out (then) ☒ An outbound call is logged as "Talked" ☐ The lead's pipeline changes ☐ The tags that triggered the Smart Plan are deleted

☐ The "Source" of the lead changes

PLEASE NOTE: Days later are how many days need to go by before the next automation goes out.

Step 1: Wait 12 mins: Text #1

Hi #lead_first_name#, I just noticed you were checking out #trigger_behavior_listing_addr#. Would you like to see it tomorrow? I got time! -#agent_first_name# the Realtor

Step 2: Wait 20 min: Email #1

Subject: Did you see #trigger_behavior_listing_addr#

Hi #lead_first_name#!

I just wanted to follow up regarding my text, I'm not sure if you got it or not. I saw that you're interested in maybe checking out #trigger_behavior_listing_addr# and I was wondering if you'd like to see it tomorrow or the next day?

Let me know!

-#agent_first_name#

#signature#

Step 3: 1 Day Later: Text #2 @ 8:30am

Morning #lead_first_name#, I wanted to circle back regarding checking out #trigger_behavior_listing_addr#. Were you hoping to see it?

Step 4: Immediately After Last Task: Task Call

Voice Message: *Your voice message* (Ex. Checking In Voicemail)

Step 5: Wait 4 mins: Email #2

Subject: Missed Call #lead_first_name#

Morning #lead_first_name#,

I wanted to circle back regarding #trigger_behavior_listing_addr#.

Were you hoping to see it?

-#agent_first_name#

#signature#

Step 6: Wait 4 hrs 10 mins: Text #3

Let me know!

Step 7: 1 Day Later: Text #4 @ 9:30am

Alright #lead_first_name#, I'm just gonna take it that you're no longer interested in #trigger_behavior_listing_addr#. No problem! If you see any other homes you'd like to check, call or text me and I'll get them set up for you! Have a great day! 😊

Reengagement Campaign

Description:

This campaign is designed to automatically reengage old leads and turn them into new hot clients while you sleep. This campaign consist of 11 text messages, 7 emails, 9 ringless voicemails, and 9 optional call tasks.

Running The Campaign:

You'll notice that this campaign will have "and or" tasks. Example of this is for the ringless voicemail where you can just let it automatically run, with the option to call the lead as well, or you can turn off the ringless voicemail (maybe your CRM can't do that or you don't want to use Slydial) and just only call the lead instead.

Applying This Campaign: you should apply this campaign to any old group of leads that are not currently being follow up with to attempt to reengage them. **WARNING!** Do not apply this campaign (or any campaign) to more then 100 leads a day. Doing so will result in more lead responses then you can handle.

PLEASE NOTE: Days later are how many days need to go by before the next automation goes out.

1 Day Later: Text #1 @8:30am

Good morning #lead_first_name#. It's been awhile hasn't it? I just wanted to follow up with you and see if you're still looking for a new home? -#agent_name# the Realtor

1 Day Later: Email #1 @8:30am

Subject Line: Are You Still Looking #lead_first_name#?

Good morning #lead_first_name#!

I know It's been awhile... I wanted to quickly follow up and see if you're still looking for a new home.

Anything I can help you with?

Talk soon,

#signature#

1 Day Later: Text #2 @4pm

Afternoon #lead_first_name#, I just wanted to follow up from my previous text...

3 Day Later: Email #2 @10:36am

Subject Line: Are You Still In The Market?

Hi #lead_first_name#, Are you still in the market for your new home?

I got some new listings that you might love.
Want me to send them to you?

Your Realtor
#signature#

5 Days Later: Task Call @12pm

Hey *YOURNAME* the Realtor here, I hope all is well, I'm just following up with you regarding your home search, I know it's been awhile since we last chatted and I wanted to see if that was something you still needed help with! Let me know where you'd like to go from here. Again this is *YOURNAME* with *YOURCOMPANY* at *YOURPHONENUMBER*. Talk soon!

5 Days Later: Text #3 @9:10am

Hi #lead_first_name#, I wanted to follow up and see where you'd like to go from here? Haven't heard from you in awhile... Are you still in the market for a new home or did you find a place already? -#agent_name# the Realtor

6 Days Later: Task Call #2 @9:30am

Hey *YOURNAME* the Realtor here. Just checking in regarding my previous messages. Wanted to see if you're ready to start up your home search again! Let me know if you'd like to see some this weekend or if you'd like me to send you a fresh list of the best houses to look at. Again this is *YOURNAME* with *YOURCOMPANY* at *YOURPHONENUMBER*. Talk soon!

7 Days Later: Email #3 @3:45pm

Subject Like: Timeline?

Hi #lead_first_name#,

I just wanted to circle back and see if you had any thoughts on your timeline that I could quickly make note of?

Regarding your home search that is. I'm assuming things are on hold for a bit?

-#agent_name# the Realtor

#signature#

8 Days Later: Text #4 @12pm

Quick question #lead_first_name#, are you still in the market for a new home? I haven't heard from you in awhile and I wanted to check in...anyways I hope all is well with you!

9 Days Later: Task Call #3 @8:12am

Good morning! *YOURNAME* the Realtor here. I hope all is well! Just checking in seeing how the house search is going. Let me know if you'd like to see any homes. I got some time this weekend if you'd like to check out some properties. Shoot me a text or give me a call. Again this is *YOURNAME* with *YOURCOMPANY* at *YOURPHONENUMBER*. Talk soon!

10 Days Later: Text #5 @8:49am

Hey #lead_first_name#, I left you a voicemail last week... Wanted to circle back and see if a new home is something you've put any thought into lately... Is there anything I can do for you? --
#agent_name# the Realtor

11 Days Later: Task Call #4 @11am

Hey *YOURNAME* the Realtor here, I'm just doing a friendly curtsy check in to see how things are going. Also wondering if you're still in the market for a new house. If so give me a ring! The housing market is strong and I'd love to help you find your next home! Again this is *YOURNAME* with *YOURCOMPANY* at *YOURPHONENUMBER*. Talk soon!

12 Days Later: Email #4 @12:14pm

Subject Line: How's it going #lead_first_name?

Hi #lead_first_name, with everything that's going on right now, have you put any thoughts into finding a new home?

Now might be the best time 🤔

#signature#

13 Days Later: Text #6 @9:02am

Morning #lead_first_name#, I wanted to follow up and see where you'd like to go from here? Haven't heard from you in awhile. -#agent_name#, The Realtor

14 Days Later: Task Call #5 @8:30am

Hey *YOURNAME* the Realtor here with *YOURCOMPANY*, I hope you're having a great day! I just wanted to circle back and see if you had any questions, if there are any homes you'd like to see, and just see how your home search is going over all. Give me a call back and let me know how I can best serve you or if there are homes you'd like to see. Again this is *YOURNAME* with *YOURCOMPANY* at *YOURPHONENUMBER*. Talk soon!

15 Days Later: Text #7 @ 9:14am

Alright #lead_first_name#, so I figured you're either not interested in buying a house or you're trapped under something heavy! Let me know if there is anything I can do for you. Especially if you're trapped under something heavy so I can send help! Lol -#agent_name#, The Realtor

16 Days Later: Email #5 @12:12am

Subject Line: What's the plan #lead_first_name#?

Hi #lead_first_name#, wanna buy a house?
#agent_name# the Realtor.

#signature#

Website Activity: Back To Website After 45 Days

Auto Applied: Below is how I auto apply this smart plan.

Plan Name * Target Lead Type *

☒ My Plan ☐ Team Plan

Application Conditions Auto Apply ☒

When: Has Certain Behavior Source: Any Triggering Behaviors: Returning to the Website - After 45 days

Auto Pause When

☒ The lead responds / reaches out (then) ☒ An outbound call is logged as "Talked" ☐ The lead's pipeline changes ☐ The tags that triggered the Smart Plan are deleted

☐ The "Source" of the lead changes

PLEASE NOTE: Days later are how many days need to go by before the next automation goes out.

1 Day Later: Text #1 @8:30am

Good morning #lead_first_name#. It's been awhile hasn't it? I just wanted to follow up with you and see if you're still looking for a new home? -#agent_name# the Realtor

1 Day Later: Email #1 @8:30am

Subject Line: Are You Still Looking #lead_first_name#?

Good morning #lead_first_name#!

I know It's been awhile... I wanted to quickly follow up and see if you're still looking for a new home.

Anything I can help you with?

Talk soon,

#signature#

1 Day Later: Text #2 @4pm

Afternoon #lead_first_name#, I just wanted to follow up from my previous text...

3 Day Later: Email #2 @10:36am

Subject Line: Are You Still In The Market?

Hi #lead_first_name#, Are you still in the market for your new home?

I got some new listings that you might love.

Want me to send them to you?

#signature#

5 Days Later: Task Call #1 @12pm

Hey *YOURNAME* the Realtor here, I hope all is well, I'm just following up with you regarding your home search, I know it's been awhile since we last chatted and I wanted to see if that was something you still needed help with! Let me know where you'd like to go from here. Again this is *YOURNAME* with *YOURCOMPANY* at *YOURPHONENUMBER*. Talk soon!

5 Days Later: Text #3 @9:10am

Hi #lead_first_name#, I wanted to follow up and see where you'd like to go from here? Haven't heard from you in awhile... Are you still in the market for a new home or did you find a place already? -#agent_name# the Realtor

Website Activity: Views Listing 3 Times

Auto Applied: Below is how I auto apply this smart plan.

Plan Name *

Website Activity: Views Listing 3 Times

Target Lead Type *

All

☒ My Plan

☐ Team Plan

Application Conditions

Auto Apply ☒

When: Has Certain Behavior

Source: Any

Triggering Behaviors: View One Listing ≥3

Clear

Edit

Auto Pause When

☒ The lead responds / reaches out (then

No action

)

☒ An outbound call is logged as "Talked"

☐ The lead's pipeline changes

☐ The tags that triggered the Smart Plan are deleted

☐ The "Source" of the lead changes

PLEASE NOTE: Days later are how many days need to go by before the next automation goes out.

Step 1: Wait 32 mins: Text #1

Hi #lead_first_name#, I don't know if you've gotten the chance or not but have you seen #trigger_behavior_listing_addr#? Looks like it might be a really nice home for you.

Step 2: Wait 1 min: Text #2

Let me know if you want to see it!

Step 3: Wait 1 Day: Text #3

Did you get a chance to take a look at #trigger_behavior_listing_addr#?