

PLACESTER



How to capture and convert leads?

Comprehensive guide made by Placester and Cloze



This is a comprehensive guide to helping real estate professionals capture and convert leads.

In our guide, you'll learn - step by step - how to succeed in all of the stages of marketing and sales funnel, that's awareness, evaluation, and lead conversion, including:

- Different ways of traffic generation
- The role of the incentive/magnet to catch the lead
- Features & pages taking part in lead generation
- Role of CRM in the real estate business
- Cloze traits to convert real estate leads

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Chapter 1

A bit of theory about lead generation in real estate

For a real estate agent, a lead could be someone interested in buying a house (but doesn't yet have an agent lined up) or someone interested in selling a home (but doesn't yet have an agent to list the property).

Requirements for Qualified Real Estate Lead:

- Interested in buying or selling a house
- Financially capable of buying
- Willing share contact information with you (such as a phone number or email address) for a follow-up

You have to figure out what else to describe your target group with those basics. Whether you are selling single-family homes, multi-family homes, in local or rural centers, or perhaps luxury estates. Think about it because your target customer, also known as a **MARKETING PERSONA**, is the essential element to which the narrative of your marketing activities is tailored.

Customer Journey

Buying or selling the property is not as simple as we think. The transaction is related to some risks; the buying process is not as short and straightforward as buying apples in the grocery. Buyer and seller go through what marketers call the “customer journey.” This journey describes how the lead moves from awareness (learning about a product or service) through conversion (buying that product or service). From the marketer’s perspective, this journey looks like a funnel; there is attrition at every stage, so marketers know they’ll need to make many people aware of their services to convert a few.



Different perspectives

STAGE	AGENT	CUSTOMER
Awareness TOFU - Top of the funnel	You have to let yourself be found.	They want to buy or sell the property. Start searching for opportunities.
Evaluation MOFU - Middle of the funnel	You strengthen your image as a professional agent with experience.	They are comparing the agent's offers and services.
Conversion BOFU - Bottom of the funnel	You build a relationship with your customer based on trust.	They built the trust with the agent and are willing to phase the transaction.

To succeed in this competitive market, you need tools such as a professional website built with an eye on lead generation & CRM to nurture leads for conversion. But even the best build website and CRM will not magically conjure up customers if there is no traffic to the site. Your site should also have content that delights potential customers while they explore their options so much more easily than if it were simply another generic property listing online!



70% of broker/broker associates and 69% of sales agents have a website

So let's see how to generate traffic to your website.

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Chapter 2

Generate traffic with content, SEO, and advertising

CONTENT

Some of the information that prospects find about you on the web—how long you’ve been in the business, which listings you have, etc.—is completely straightforward. You can highlight it, but you can’t change it.

Others create other information—reviews, ratings, etc.—beyond your control. But there’s plenty of information you can control and create, and this is what we mean when we say “content”: the stuff you write, shoot, and share that differentiates you and gives prospects something to go on when they’re considering whether or not to hire you.

Still, it’s not just about creating content: it’s about creating premium content. After all, the increase in the availability of information also means an increase in noise. Years ago, your potential clients only had a few options.

Today, they have seemingly unlimited options. So how do you make yourself heard? Producing content that's better, more engaging, and more informative than the other. We're here to show you how to do it.

Content goals:

- Content builds trust,
- Establishes you and your company as experts in the industry,
- Gives you something to share on the social web,
- Drives organic traffic through SEO and social media sharing.

Guide to Creating Killer Content for Real Estate Marketing



101 (New) Hyper-Local Blog Post Ideas



SEO

The crucial element that lets your content shine is SEO. When your article and website are created according to SEO rules, you have a huge chance of being in the first search results. And that means your website is more likely to be visited.

The keyword strategy is the spine of the website and its content. A keyword is simply a word or concept that best describes the content on a given post or page. It's the search term you want to rank for with a page on your website. The terms buyers use during the home search process will be somewhat predictable.

By identifying the terms potential leads are searching during the home buying process, you can target them with relevant pages/posts, like property listing pages, and blog content. Target and rank for the right keywords,

Guide to Real Estate Keywords (+ 105 Ideas)



How to Dominate SEO for Real Estate



and you'll have a consistent flow of qualified traffic flooding your website each month.

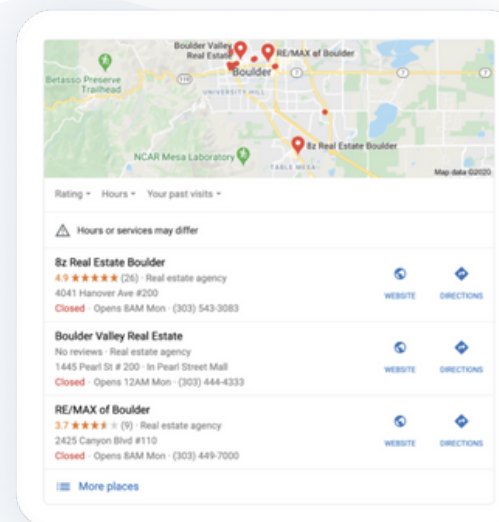
The National Association of REALTORS® also gathered data on the first steps that buyers take during the home search process:

- Looked online for properties for sale: 41%
- Contacted a real estate agent: 14%
- Looked online for information about the home buying process: 10%
- Contacted a bank or mortgage lender: 9%
- Talked with a friend or relative about the home buying process: 7%
- Drove-by homes/neighborhoods: 7%

More than half of the buyers who could become your leads (51%) start their home search online—which means that local SEO search engine optimization) can be a very effective way to attract local buyers.

We have another complete resource on SEO and other SEM (search engine marketing) tactics that you should check out if this strategy interests you, but at a bare minimum, you should create a [Google My Business page](#) for your business and make sure you fill out your name, address, and profile—otherwise known as your NAP—consistently everywhere.

If you do this well, you can rank in Google's map pack, the top three results shown when searchers are looking for a resource.





ADVERTISING

Before you start spending money on ads, it's essential to understand what your real estate advertising can (and will) do for your business. What exactly are you hoping to accomplish with your ads?

Yes, you want to generate leads. But do you know where you're going to send those leads when they notice your ad and want to learn more about you and your business or how you can help them buy or sell a house?

Rethink the advertising strategy:

- Which possible leads you're trying to reach?
- What attracts those leads & what can you promise in the ad?
- Where to send them?
- What information should be provided on the dedicated page?
- What's the next step?



If you're hoping to help buyers in your market, your ad will likely target people trying to buy a house, and you'll want to consider your campaign accordingly. For example, a buyer is probably more likely to search Google for how much a house costs or what houses are already listed for sale. Or they might be looking for information about the neighborhood where they want to move. On the other hand, a seller might be more interested in home improvement information, such as how to refinish flooring, so it looks new.

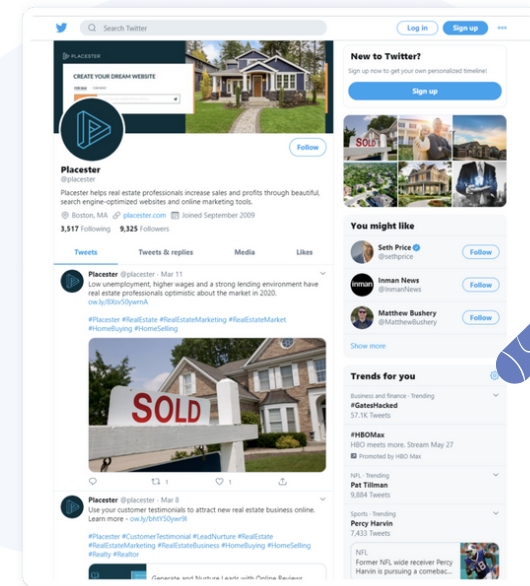
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Facebook & Instagram real estate advertising

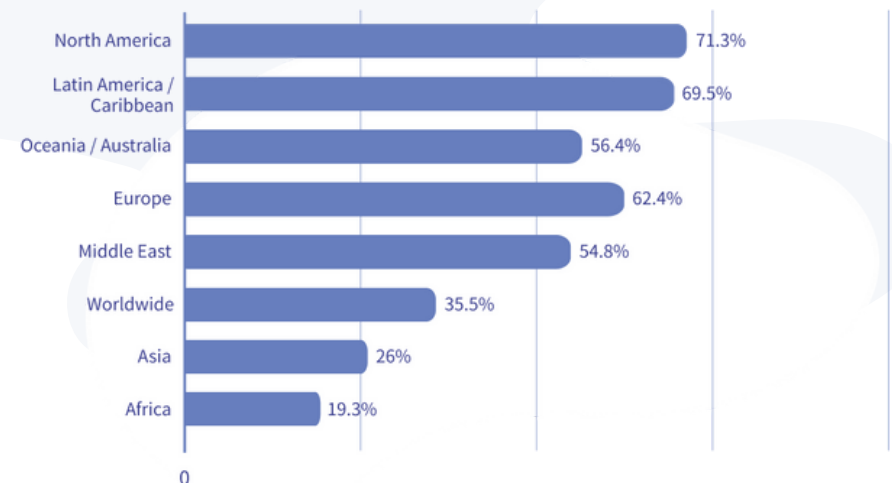
Facebook and Instagram are two places where people waste a significant amount of time every day, which makes them prime candidates for real estate advertising. Whether you're targeting buyers who are seeking homes for sale or information about how to buy or sellers who want to know exactly how much they could get for their house, both groups are likely to be whiling away at least some of their time on these two social media platforms.

When it comes to visually appealing ads, Facebook and Instagram are two of the very best places you could be showing your ads. People are on those apps to distract themselves and discover novelty; your audience is already in the mood to look at homes for sale. (Are they serious buyers? That's a different question!)

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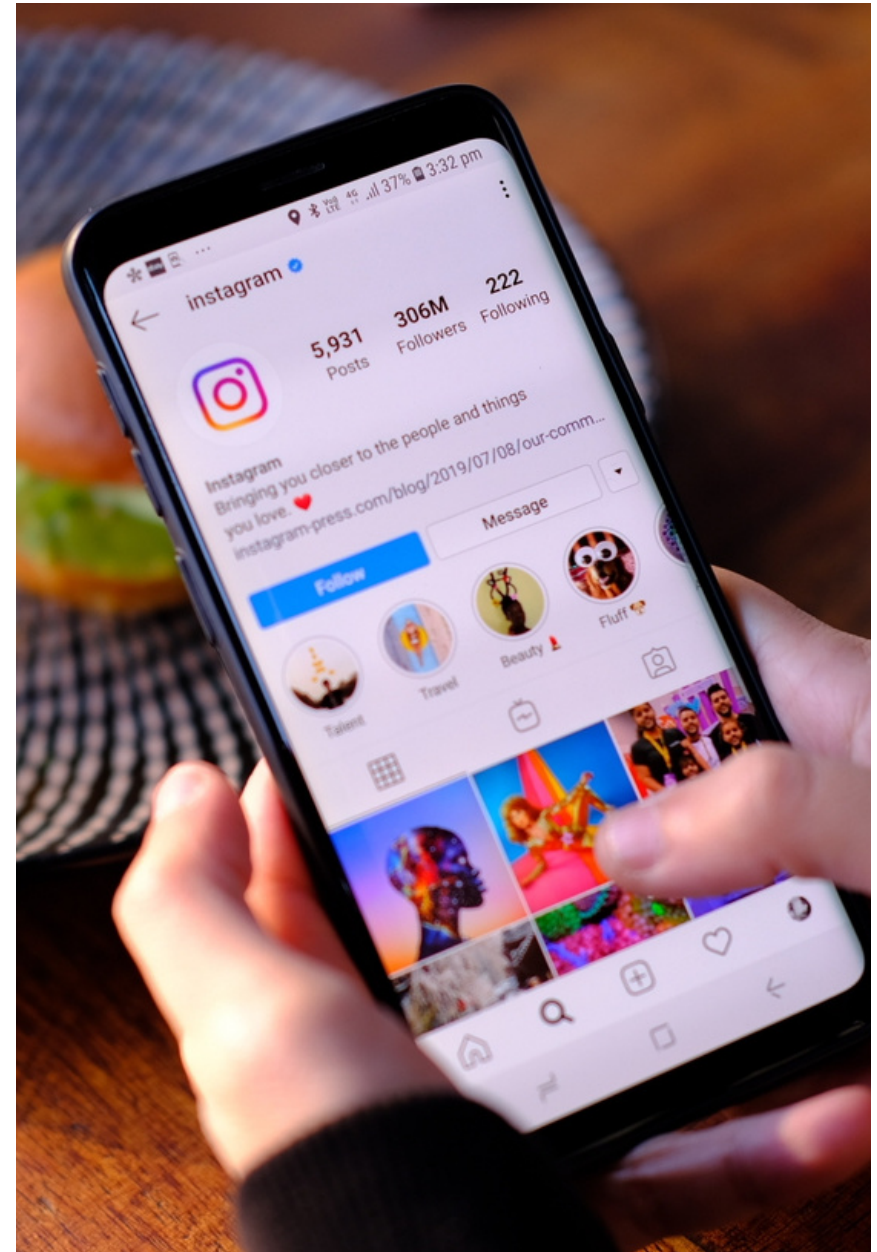


Percentage of global population using Facebook, 2021



Facebook and Instagram also have built-in messaging tools, which you can use to start conversations with page visitors and get a sense of where your lead might be in terms of buying or selling a house. Hosting a virtual open house or buyer seminar? You can create a Facebook event for those and then advertise your event on the social media giants.

Learn more about [how to advertise your real estate business on Facebook](#), including different types of ads available.



YouTube real estate advertising

As the world's biggest video platform YouTube has a little bit of something for everyone. Buyers and sellers might visit YouTube for a neighborhood tour or to learn how to replace those ugly light fixtures before putting a house on the market. By understanding their needs on YouTube, you can craft video ads that entice them to consult an expert (that's you) to help solve their problem.

YouTube also has a whole host of videos geared toward people like you—other real estate agents who want to learn how to do something. As your business grows, especially if you're thinking of forming a team someday, you can use YouTube videos to grow your business by attracting new agents to your side.



Types of YouTube ads

- **Skippable in-stream ads**

These ads play before or during a video (a.k.a. “pre-roll” or “mid-roll”). Their defining feature is that viewers can choose to skip them after the first 5 seconds.

- **Non-skippable in-stream ads (including bumper ads)**

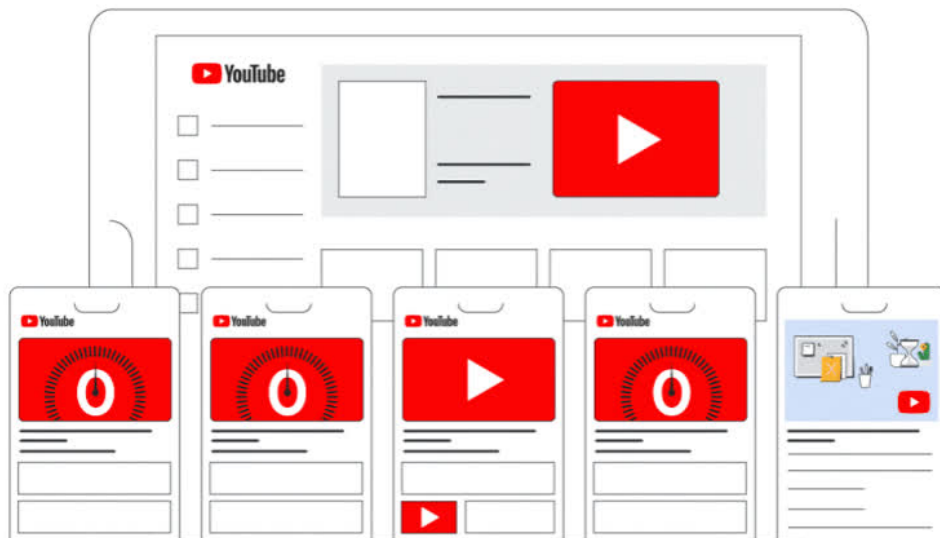
These are pre-roll or mid-roll ads that don’t have a skip button at all, and they take 15 seconds or 6 seconds in case of bumper ads.

- **Video discovery ads (known as in-display ads)**

Whereas in-stream ads function as traditional TV commercials, discovery ads are more akin to the ads you see on Google’s search results page. They show up alongside organic search results. So if your video looks more relevant than the organic results, people can choose to watch it instead.

- **Non-video ads**

- Display ads: appear on the right-hand sidebar, and include an image and text alongside a CTA with a link to your website.
- In-video overlay ads: appear floating on top of video content from monetized YouTube channels.

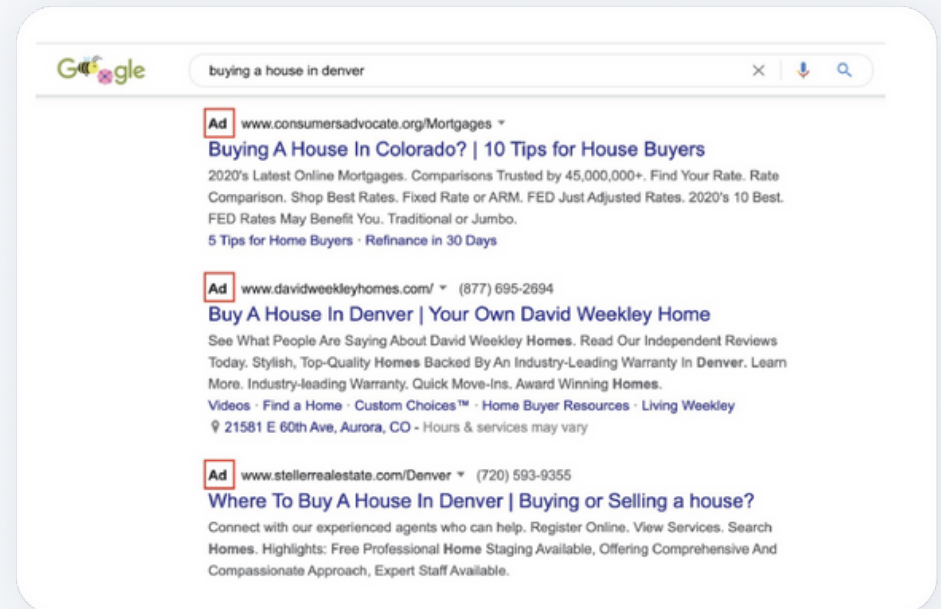


Google Ads for real estate

The most powerful search engine globally, Google processes billions of searches every day to help users find what they're seeking—and often, to place an ad in front of their eyes in the process. As Google has grown, its ability to show ads to seekers has also expanded, allowing you to place your ads in front of those seekers.

Most of the time, people don't visit Google arbitrarily to waste time. They're usually trying to find something specific, whether a home for sale or a real estate agent. If you understand the search intent of people who might become your leads, and create your Google ad around that search intent, then the odds of you crafting an ad that answers a question and brings audience members flocking to your website are much, much higher.

Google is especially text-ad-friendly, which is fantastic for people who have a way with words (and maybe not so much with a camera).





If you're looking for a custom and eye-catching flyer, our creative team has just what your brand needs!

Check it out



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Print real estate advertising

A print ad is typically considered an ad in a magazine or newspaper, but a flyer that you print up and mail out to your farm is also a print ad. These ads usually include a combination of text and images (though most are more image-heavy) with a call to action to learn more—usually on your website.

Some popular print ads include homes you're currently listing for sale, a list of recently sold homes (and how much they sold), or simply an ad with your photo explaining your specialty. If you don't have a niche yet, that's okay, but once you develop one, don't forget to think about how you might reach your target audience in print. For example, if you find yourself specializing in divorce sales, then advertising that fact in your local business journal or state legal magazine can get your name in front of many divorce lawyers!



Chapter 3

Lead capturing on Placester

The website is your business card; it should support and help you generate traffic. So, equip the site with elements that capture leads for conversion into customers! Remember: We are always trying our best to convince someone (a customer) to leave their contact information on an online form so they can purchase something from us - treat this as if it's just another transaction when designing websites accordingly.

Let's start with pages that help you capture leads.

PAGES DEDICATED TO LEAD CAPTURE

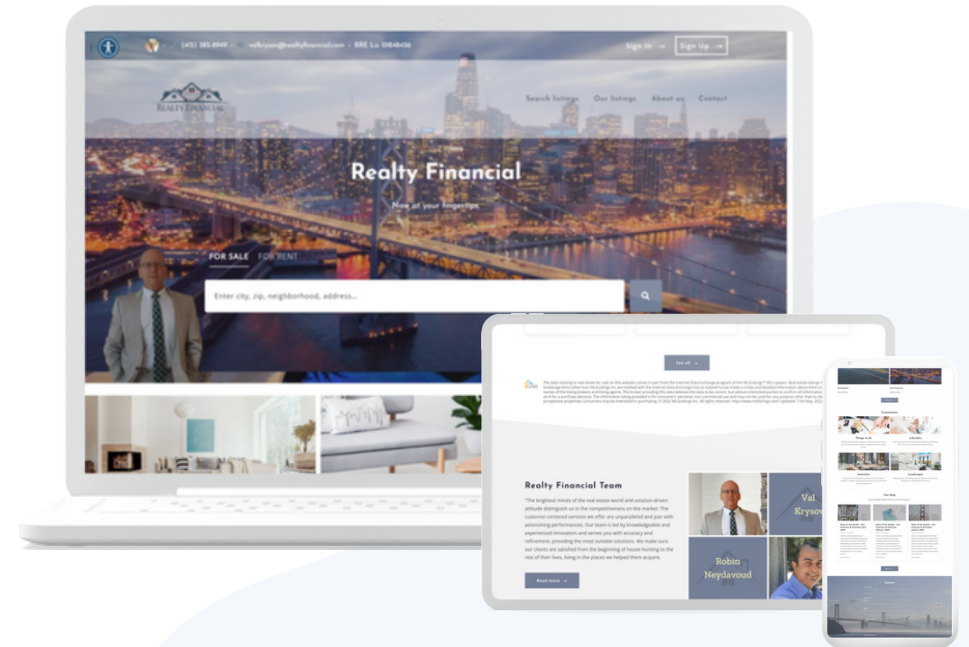
Home page

If someone is landing on your website because they Googled your name, your home page is like the front door of your professional house. It should sport curb appeal and hint at the space and resources inside the (freshly painted and pristine) walls.

There are some things that visitors are going to expect to see as a matter of course on a home page:

- Your name and logo
- Clear, simple, intuitive page navigation
- Contact information: phone, email address (or link to form), social media icons
- CTA buttons or forms that help you lead capture

Branding should be consistent across your home page and, in fact, your entire website. If you're having difficulty creating a cohesive and coherent "feel" for your website, consider hiring a designer to help you finesse your brand and design guidelines for you to follow moving forward.



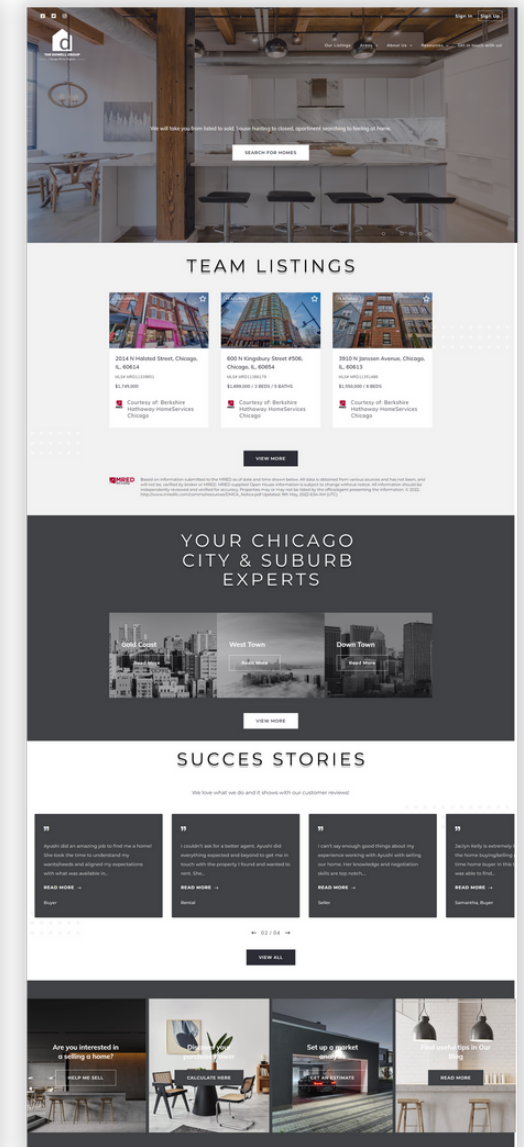
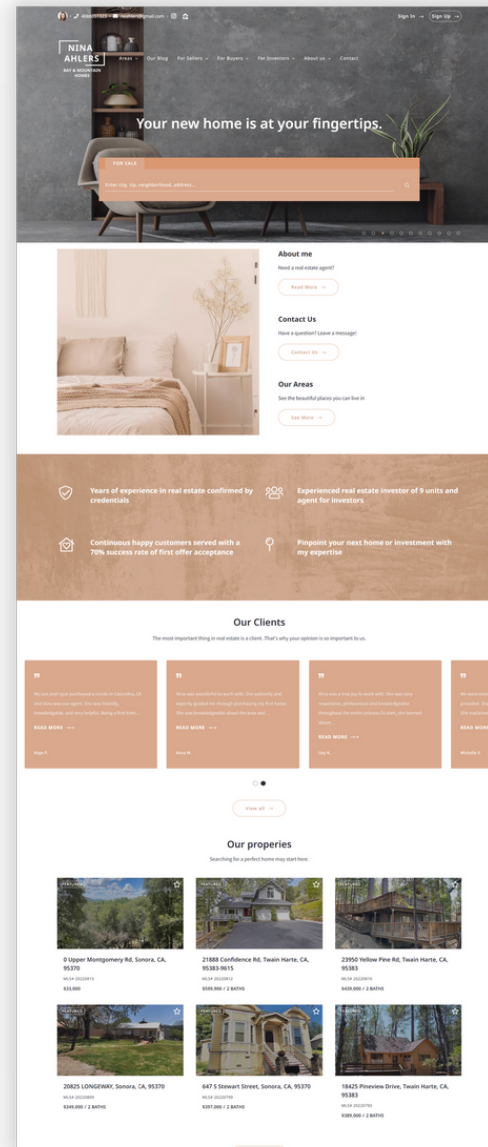
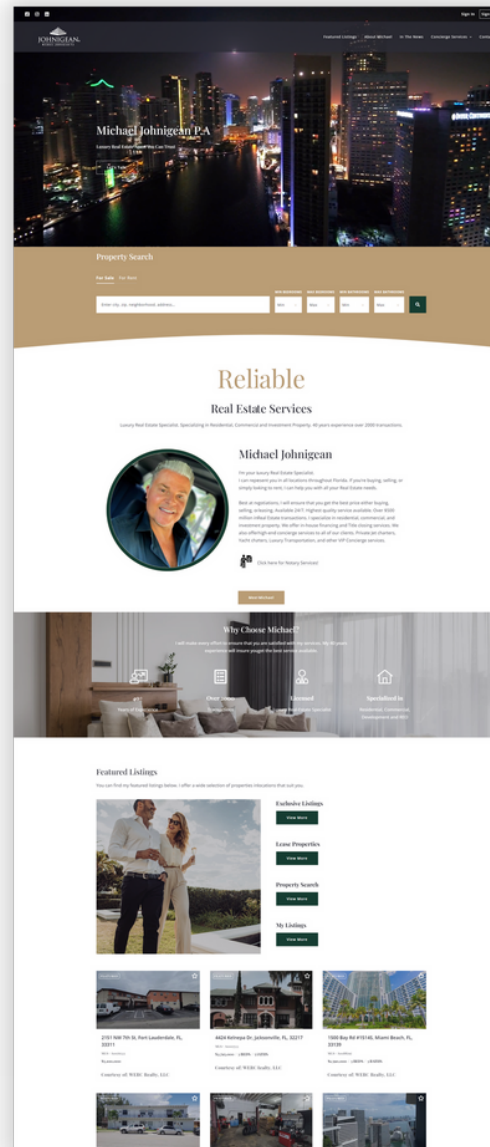
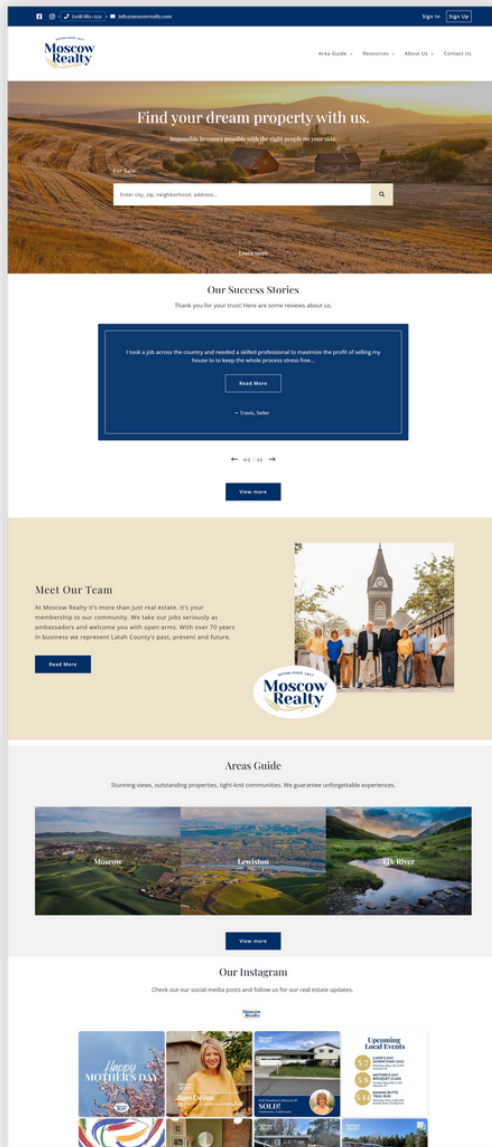
The ultimate guide to building a real estate website



[Download](#)



Examples



IDX featured modules & search index pages

Searching for houses online is usually the first step a buyer takes when they're trying to purchase a home—and sellers are going to want to know that you can show their home to as many buyers as possible—so it's clearly important to include IDX search on your website. But consider that if all your visitors want is a typical IDX search experience, they're probably going to head to one of the portals instead.

Think about the neighborhoods or regions where you have the most expertise, and ask yourself what kind of niche listing searches people would love to see. Mid-century modern homes of a specific size? Historic fixer-uppers? Homes with ADUs, or other accommodations for long-term guests or multiple generations?

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Don't limit yourself to just one page! Experiment to see which listing niches are most popular, and ask your current buyers what types of homes they're most interested in seeing.



81% of Realtors have listings on their website,
69% have information about buying and selling

Our properties

Searching for a perfect home may start here.

17031 Draper Mine Road, Sonora, CA, 95370
MLS# 20220853
\$299,000 / 2 BATHS

10451 Mountain Brow Road, Sonora, CA, 95370
MLS# 20220852
\$675,000 / 1 BATHS

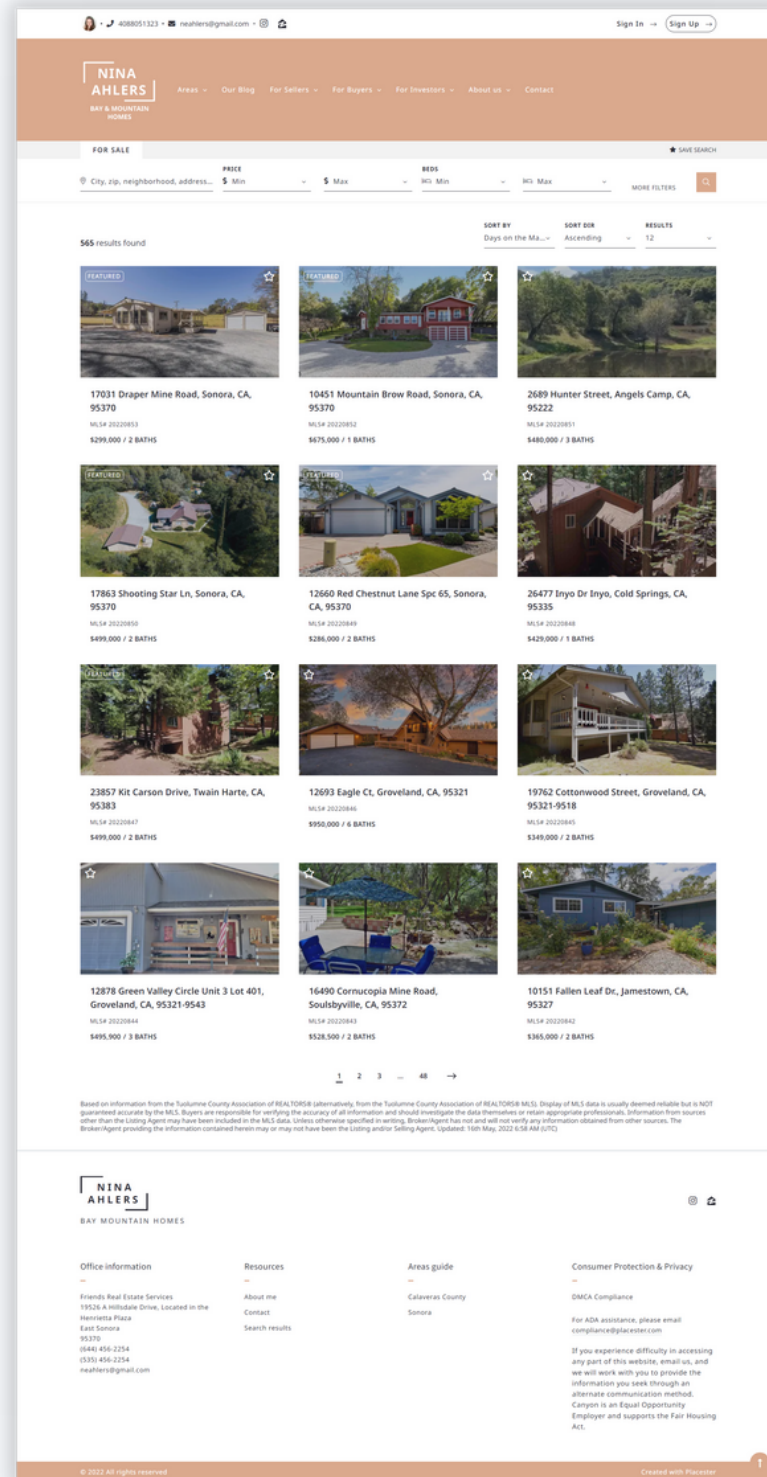
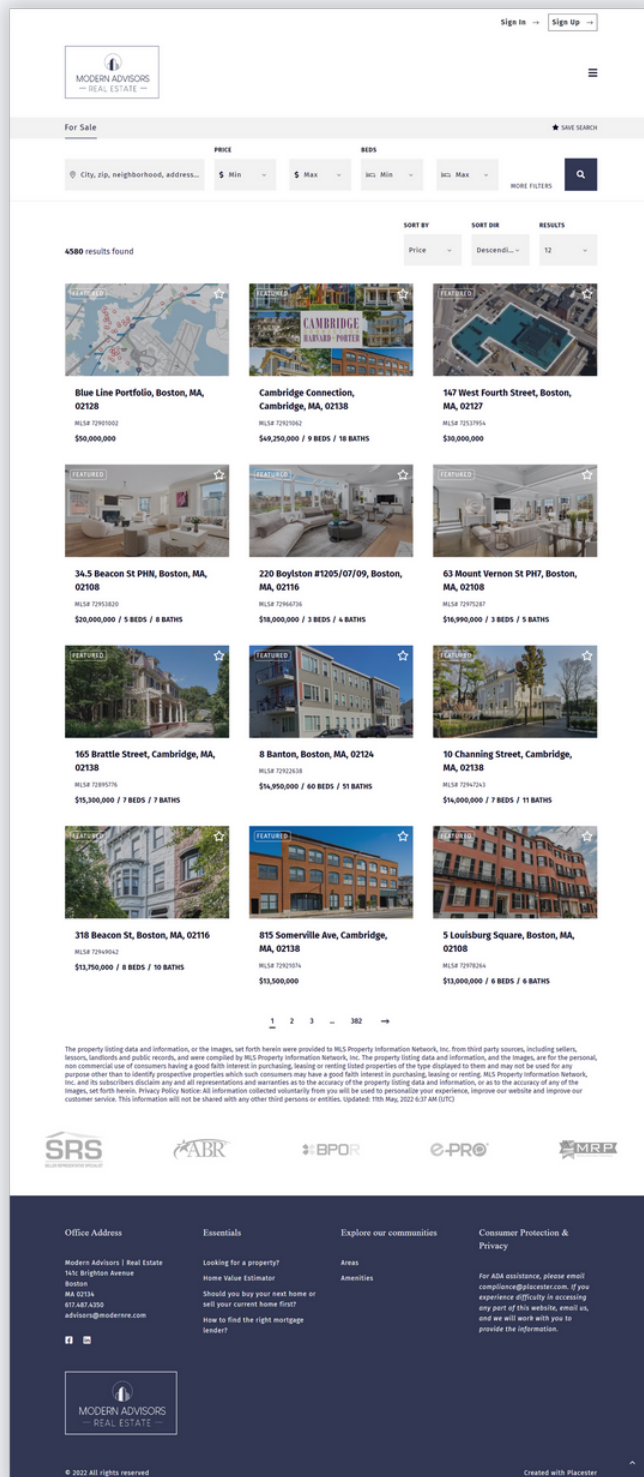
17863 Shooting Star Ln, Sonora, CA, 95370
MLS# 20220850
\$499,000 / 2 BATHS

12660 Red Chestnut Lane Spc 65, Sonora, CA, 95370
MLS# 20220849
\$286,000 / 2 BATHS

23857 Kit Carson Drive, Twain Harte, CA, 95383
MLS# 20220847
\$499,000 / 2 BATHS

21920 Russian River Drive, Sonora, CA, 95370
MLS# 20220841
\$474,900 / 2 BATHS

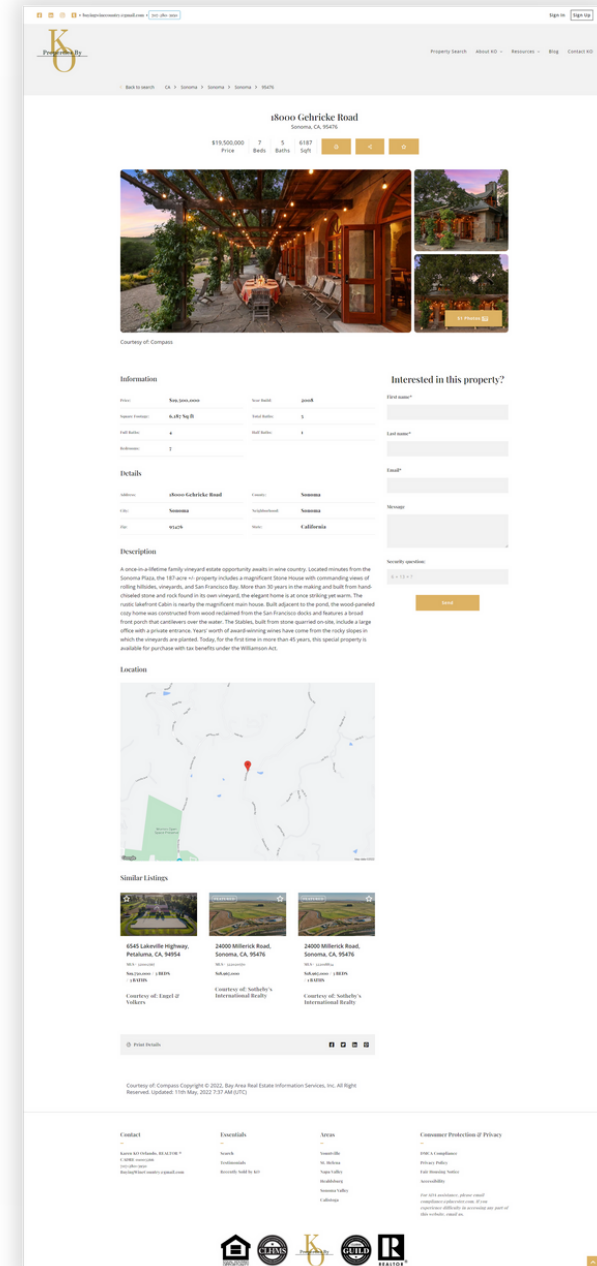
See more →



Listing pages, Property Detail Page

On your website should be one place people can see absolutely everything about the property, from 3D tours to high-resolution and gorgeous photos to detailed information and history. This is what pages like the Property Detail Page are for. It's also helpful to share a few tidbits about the closest places to grocery shops, the local schools, and any other pertinent facts that a buyer might want to know offhand.

Remember that those pages can generate over 95% of all traffic, so you should pay extra attention that they are properly laid out. You can promote it, offer additional downloadable resources, and gate it - you have a lot of possibilities to use it to capture SQLs (sales qualified leads).



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Annie & Kenney 832-564-5694 anniefarm@kw.com

Sign In Sign Up

DILLARD REALTY TEAM
HOUSTON HOUSE WHISPERERS
POWERED BY **KW PLATINUM**

[How Much Is My Home Worth?](#) Listings About Cypress Other areas served

How Much Is My Home Worth?

Get an Instant Home-Value estimate, and sign up for a FREE Home Report.

Enter an address

Still have questions?
Contact Us Here to get your FREE home estimate from the top 1% Local Real Estate Agents in your area.

First name*

Last name*

Email*

Your message

Security question:
3 + 10 = ?

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Keller Williams Platinum
19708 Northwest Freeway, Suite 2800
Houston
Texas 77065
832-564-5694
anniefarm@kw.com

Essentials
Listings Search
Featured Properties
Why Choose Us?
Contact Us

Explore Cypress
Bridgeland
Towne Lake
Blackhorse Ranch
Cypress Creek Lakes
Cole's Crossing
Rock Creek

Consumer Protection & Privacy
TREC INFORMATION ABOUT BROKERAGE SERVICES
TREC CONSUMER PROTECTION NOTICE
Accessibility
DMCA Compliance
For ADA assistance, please email compliance@placester.com. If you experience difficulty in accessing any part of this website, email us, and we will work with you to provide the information.

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Home valuation page

Sellers want to know how much their house would be worth in today's market. This is another example of something that most real estate websites will offer a seller, so make sure you're including more background or context around how that number is getting generated if you can. For example: "According to the latest sales, homes the same size as yours in this neighborhood sell for about \$400,000. We think yours is worth more/less based on a few different variables."

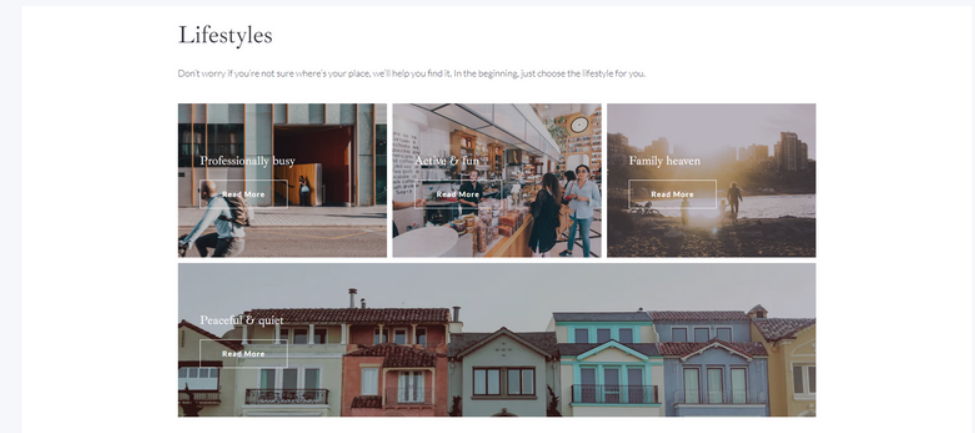
You don't necessarily have to disclose everything, but showing sellers that you have an idea of what's happening in the market and how it relates to their home is more important than your automated valuation being spot-on, especially if you invite them to get a more exact estimate from you after you take a look at their house in person.

The blog section, area, and community pages

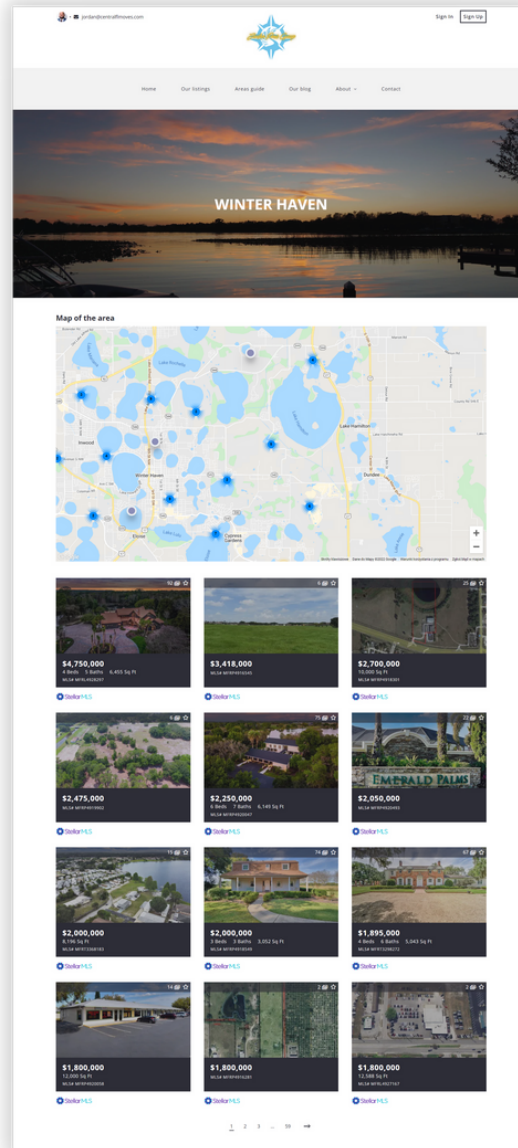
Establishing yourself as a local expert means you should be writing about a lot more than just real estate. Though it's important to show that you know what's happening in the market, it's also crucial to not just throw up listing posts after hoping that someone will eventually care. To create a blog that locals will want to visit (whether they're in the market to buy or sell a house), you'll need to give them information that they crave ... but can't find easily anywhere else. You'll develop the traffic and readership to generate those sweet, sweet blog leads if you can do that well.

Another way is to create the area or community page, which will be helpful for anyone hoping to move to the area. You can offer a valuable resource to guide them through where the parks and

recreation centers are, which businesses or events make the neighborhood stand out, and what the real estate market has been doing in that particular community. Ideally, you have a guide that will even have details that seasoned residents will find novel!



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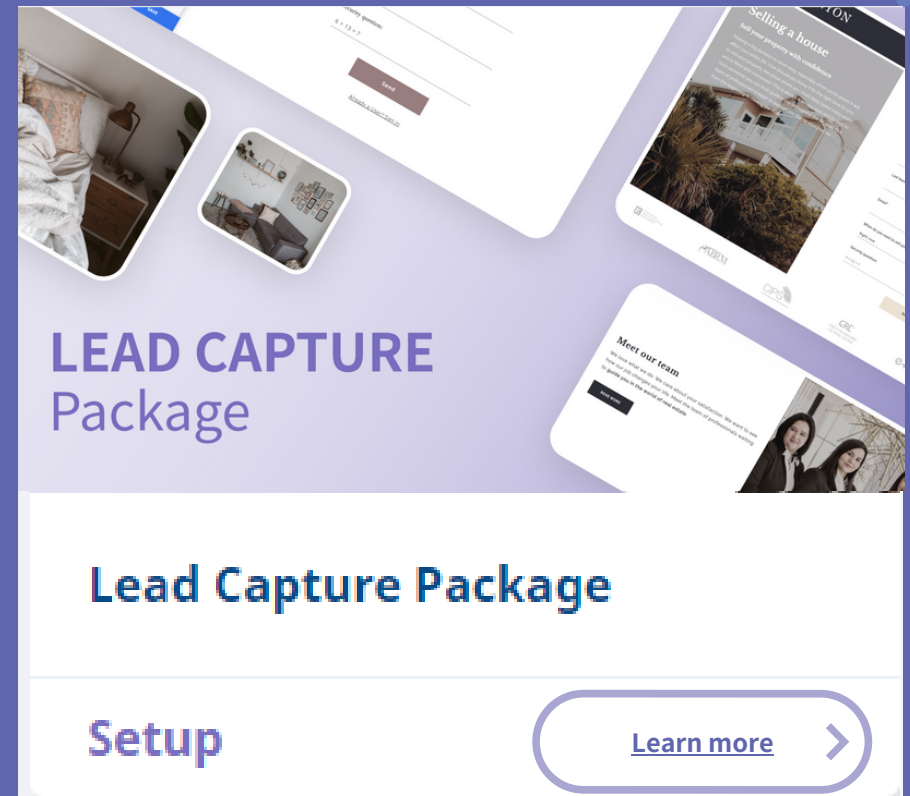
[illegible]

Lead Capture Package

Are you still sending traffic to random contact pages and hoping for the best? Collect email subscribers, add them to your lists, and instantly deliver digital files. Have the creative team design and optimize a beautiful lead capture landing page and a custom contact form.

What's included:

- 1 custom landing page
- 1 custom lead capture form
- Integrate lead capture form with Placester CRM
- Proof & format existing copy
- Format existing content
- Format existing images
- Format existing videos
- Apply royalty-free images where appropriate
- Apply featured image & meta copy
- Apply human-readable URL
- Apply CTA (call to action)
- Add to website navigation



PLACESTER LEAD GEN FEATURES & MODULES

So we know the pages that were designed to lead capture or can help you with it. Now think about what feature you would like to use on such a page to capture leads. Below are some options that you can use on the Placester website.

Capture Leads Pop-ups



Usually, pop-ups can populate on the screen over your content when a user visits a page or after the visitor has spent a certain amount of time on your website. At Placester, you control how the lead capture pop-up windows behave across your site. You can choose when the pop-up appears, the frequency, and on what page.



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Think about pop-ups as a way to generate cold leads, which you can nurture. Many agents use popups that promote resources on their websites, such as a neighborhood guide (for buyers) or an ultimate guide to selling a home (for sellers) to capture valid email addresses that can then be added to CRM. By offering the knowledge, you can easily build the trust that is needed for further transactions.

Ensure you're clear when you're capturing an email address that you want to send the recipient more information about accomplishing their home-ownership (or home selling) goals. You don't want to be accused of spamming someone!



Lead forms widgets

Lead forms allow visitors to browse your site freely, only entering their contact information if they want more details from you. When visitors look, for example, at a property page or other lead capture pages, they'll see a contact form on the right or left side of the page next to the property description. It's a less intrusive way of gathering potential client information.

Moreover, you can capture cold leads by offering users to sign-up for your newsletter. It's not a direct way to capture SQLs - sales qualified leads, but they will be in your system, willing for more information from you. That's a small win!

There are many ways to use lead capture forms on your site. However, the crucial elements to focus on are:

- Where the lead capture form appears on the page,
- How many information fields do your prospects need to fill out
- How lengthy the text is
- What you will give them in return for leaving their email address

Get In Touch

Let me know how I can help you with your real estate needs or questions.

First name*

Last name*

Phone*

Email*

Message*

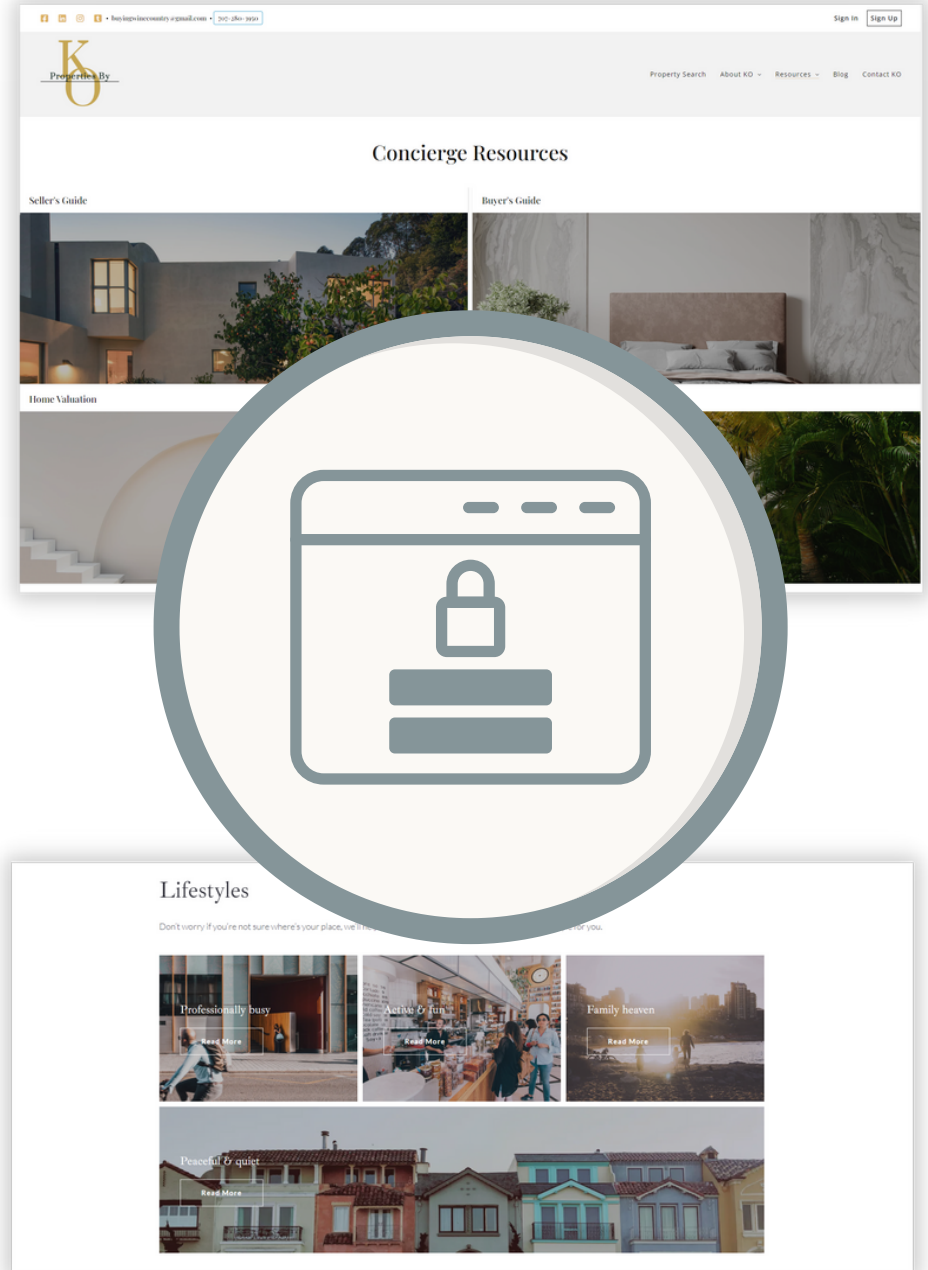
Security question:

5 + 9 x 7

Send

Gated website content

By selecting to capture leads actively, you'll be forcing visitors to enter their contact information before they can view a property details page or other selected pages. When visitors click on a property to view more details, a pop-up window will appear, prompting them to enter their information. If the visitor chooses not to do so and clicks the X button to close the window, they'll be taken back to the search results page.





The image displays two overlapping user authentication forms. The background form is titled 'Sign Up' and includes input fields for 'First Name', 'Last Name', 'Email Address', and 'Password', followed by a 'Password Confirm' field. An orange 'Sign Up' button is at the bottom, with a link 'Already a User?' below it. The foreground form is titled 'Sign in' and features input fields for 'Email Address' and 'Password', with an orange 'Sign In' button at the bottom. Below the button are links for 'Forgot your password?' and 'Create an account'. Both forms have a red border around the email input field and a red error message 'Please enter your email' below it. Each form has a close button (X) in the top right corner.

Sign-in option

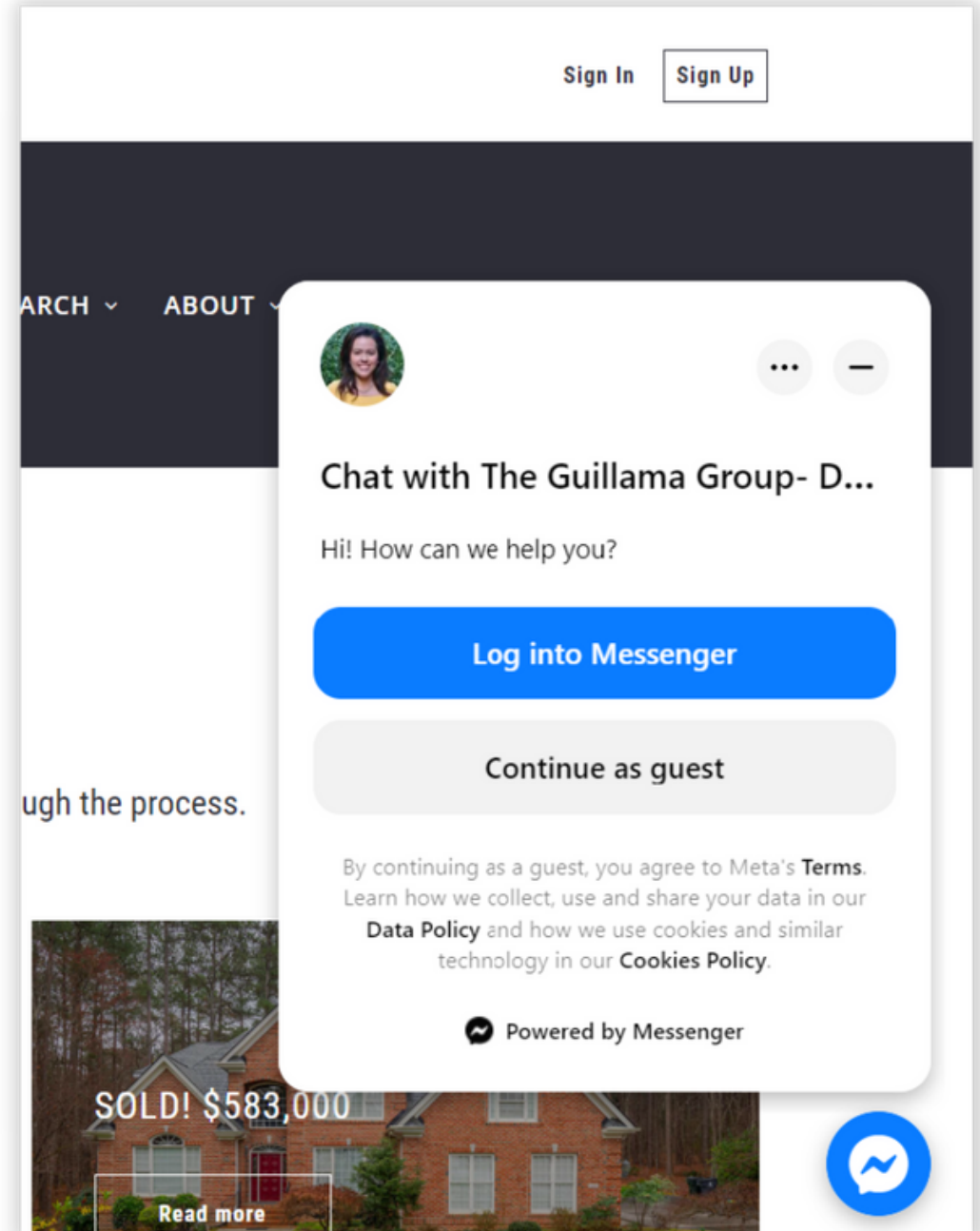
If you're thinking about how useful it would be to have access only for log-in customers, consider the benefits of keeping them involved. You can give them pages designed and available only in their circle - like alerts on offers or gated content with unique information that is restricted from others who don't have credentials! This feature lets users see things other people might not know anything about because they're part of an elite group (the logged into ones). It's essential to think about "what unique thing to show" and figure out some tactics to expand the user logged-in base.

Live Chat

Visitors to your website don't always want to fill out forms or call you. But they might be happy to engage in a live chat to get their questions answered instantly.

There are plenty of Live Chat apps available, including FreshChat, Intercom, and Drift, plus you can also use Facebook's Messenger App on your Placester website. Most apps include the option to auto-respond to website visitors and determine if human response is required. That conversation can break the ice, and you will have a chance to get the email to feed into your CRM.

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Chapter 4

Role of CRM in the real estate business

With more than 5 million homes sold each year and over 3 million real estate agents competition is fierce. The recent growth of real estate over the last two years combined with the emergence of tech-forward brokerages has further pushed both agents and brokerages to seek a competitive edge.

Leading brokers can no longer “check the box” with one-size-fits-all technologies, and instead are offering best-in-class platforms like Customer relationship management (CRM), websites,



marketing automation, lead management, home search, social media marketing, and more to their agents.

A well-integrated, leading-edge technology stack is becoming increasingly important to both recruiting and retaining agents and CRM sits squarely at the center of this strategy.

To stay ahead in the game, you need features to keep track of where everyone in their sphere of influence is in their own individual home sales journeys. By separating buyers from sellers, and both groups from homeowners and renters, agents get a sense of what information and resources are helpful for these groups during a week, month, or year.

CRM for estate agents

Real estate agents work with clients who can be considered prospects, leads, or existing clients. At its core a CRM is designed to organize and track clients at every stage of the process: this includes storing contact information and other details, collecting prospects in one place and filling in missing information about their situation; moving them to a lead stage if and when they're ready to sell or buy a house, and managing documents and process stages if that prospect decides to work with this particular agent.

All CRM software will provide a baseline of an organization and tracking features, but a modern CRM should also utilize artificial intelligence (AI) to eliminate busywork, offer mobile apps for iOS or Android, and include deep integrations across a wide variety of business software.

CRM

Some features that a CRM for real estate agents should have include:

- Daily planner and activity reminders
- Property listings
- Notification triggers
- Cloud-based data storage
- Full-featured iOS and Android mobile apps
- Drip campaigns and marketing automation
- Lead management and routing
- Social media and website synchronization
- Email management
- Integrations with other platforms
- Document management features



CRM for real estate brokers

Managing Brokers have broader needs. They need a CRM that can handle both the needs of their agents and support their own recruiting and retention efforts. Brokerage leadership looks more holistically at CRM to support lead management, relationship management, and marketing automation while also supporting their managers with recruiting and retention capabilities.



"Nowadays, good real estate technology is a given so companies must do more than just offer it. They must find ways to optimize, implement, or integrate technology better than competitors. And that is, of course, a never-ending, evolving responsibility."

T3 Sixty Swanepoel Trends Report (2022)

Brokers who still work in sales themselves or manage the team (typically a combination of sales and marketing) responsible for lead generation — can use it to keep tabs on leads they send their agents. Moreover, they take care that leads are distributed according to each agent's skills and bandwidth and further confirm that agents are reaching back out to leads on time.

Many brokers also use a CRM as a recruiting device, offering free or discounted CRM access to their agents if they sign with the brokerage. A CRM is such a critical part of a real estate agent's business that offering one for your agents (whether or not they use it) is more or less standard in real estate.



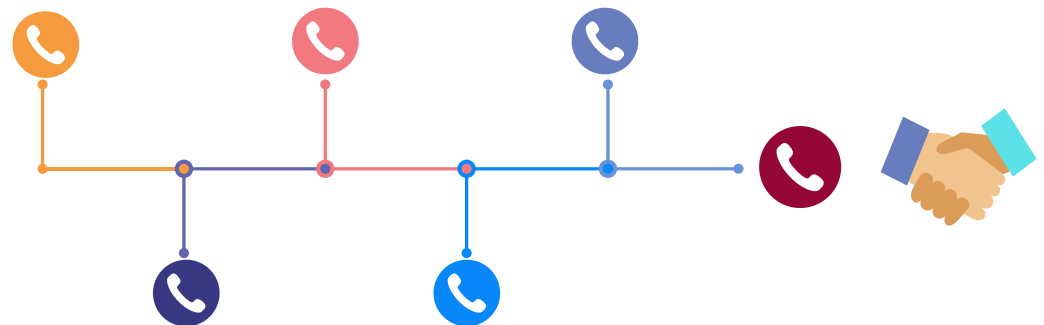
THE LEAD MANAGEMENT CHALLENGE

Does this sound familiar?

- We get a lot of leads and don't know where to prioritize
- We're "one-and-done"; leads rarely get a second call
- Leads are slipping through the cracks
- Our leads are spread across many different systems
- Lead follow-up is rarely logged in our CRM
- We don't have a system to ensure consistent follow-up
- We don't have a way to measure the effectiveness of our lead campaigns

This is the reality for most agents and brokerages. We get busy with our existing clients and other prospects that have engaged, and this causes leads to receive little attention or go completely untouched.

In fact, the industry average for follow-up on a lead is only 1.6 attempts. Yet the optimal number of call attempts is six. And persistence pays off as 95% of all converted leads are reached by the sixth call attempt.



We get a lot of leads from many sources, but the problem is that most lead services only send an email lead alert, which is easy to miss completely, or by the time we notice, it's too late. Because our leads only land in our inbox they rarely get into our CRM – it is simply too much work to cut and paste all the details – which leads to inconsistent follow-up or a way to measure the effectiveness of the lead services we utilize.

As a brokerage, the challenge is broader. Brokerage marketing teams spend a lot of resources promoting listing and guiding search traffic to their websites, but once a lead is handed to an agent, they have little or no visibility into follow-up.

This is where a CRM like Cloze can help.



Chapter 5

Converting Leads with Cloze

CLOZE CRM: NEVER MISS A LEAD

With Cloze CRM you can capture, route, and ensure every lead has a consistent follow-up plan so leads never slip through the cracks. Cloze's Lead

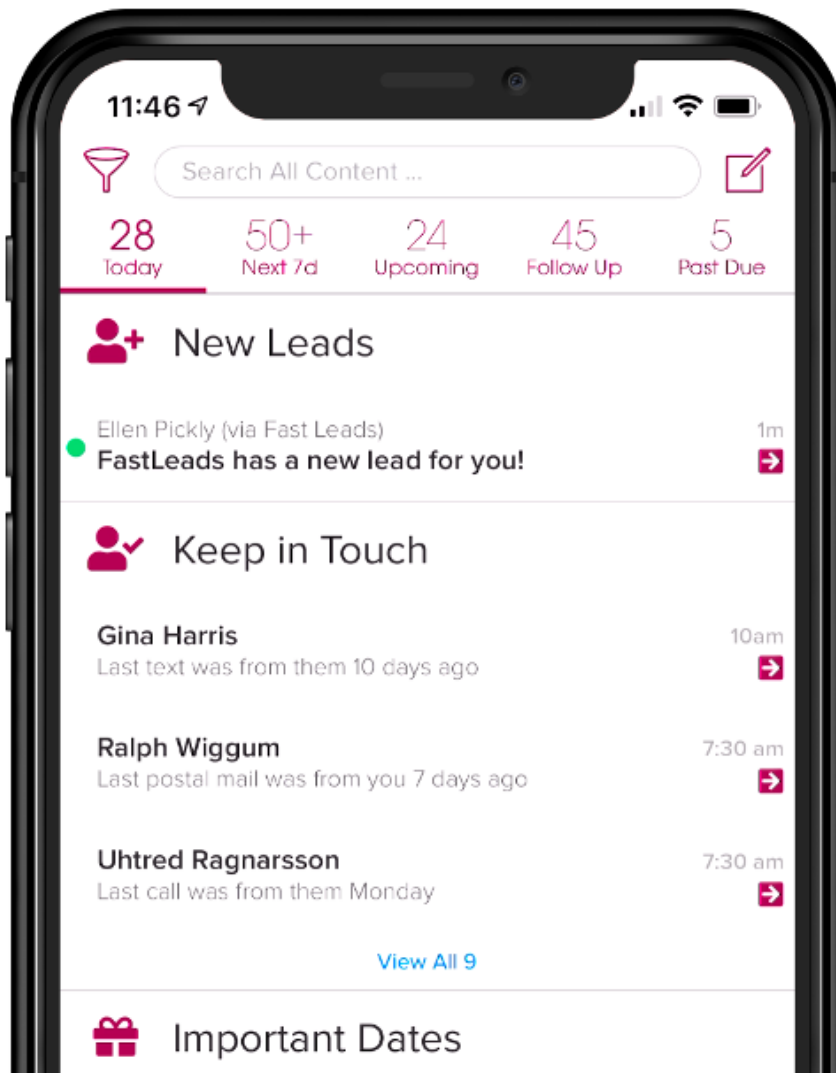
Engagement Analytics helps you focus your efforts on the people that are most likely to convert.



Cloze includes a complete Lead Management system that is comprised of three core feature sets:

- **Routing** - capture, organize and distribute leads
- **Follow-up** - apply Campaigns, Next Steps, and To-Dos to ensure follow up
- **Analytics** - see all the real activity down to the individual lead

With solutions such as Cloze CRM, we can win and take advantage of the potential of each lead that appears in your CRM. Quick, consistent contact is something that we call nurturing, and these activities are the foundation of the evaluation phase.



The Cloze CRM platform offers many features that can help win the evaluation phase and smoothly way up through conversion. Let's see how it works.

Cloze streamlines and automates your lead follow-up to ensure every lead receives consistent follow-up. Leads are captured along with any important details at the beginning of the lead process so they can be properly routed, followed up upon, and measured.

Routing includes automatically:

- Capturing the lead
- Organizing the lead
- Distributing the lead

Centralize Your Leads Into One Pool

Once you have a lead, what do you do with it? Cloze will help you place it in the appropriate segment, keeping all of your "like" leads together—without you having to do a thing. The CRM will automatically collect and centralize all your leads from Placester, social media, and even snail-mail campaigns.

What makes Cloze unique is that it automatically tracks both inbound and outbound calls and texts using your real phone number, and it syncs with all email and calendar systems, keeping extremely close track of when you last spoke with which lead and who should be up next on your list of people to contact and help. Cloze's AI will even recommend when it is time to get back in touch with a lead.



FOLLOW UP, LEAD ROUTING

Speed And Consistency: How To Win Trust

Let's say a lead has just visited your Placester website and entered their contact details; it's a current homeowner hoping to get a valuation for their home and possibly list it for sale. Or perhaps it's a buyer who found their dream house on your IDX search and wants to learn more about it and possibly take a tour.

How fast do you need to get back to those leads?

Experienced agents know that the answer is "the sooner, the better." An age of instant sales means that people aren't used to having to wait for answers, and if you can contact them right away to



Be Fast:

The odds of connecting with lead if called in **5 minutes versus 30 minutes drop 100 times.**

let them know you can help, that's aligned with many customer expectations in 2022.

Cloze allows you to accept leads and follow up with them immediately, without entering any data whatsoever to launch the relationship. As you receive leads Cloze uses artificial intelligence (AI) to automatically extract lead information. And Cloze alerts you immediately so you can quickly follow up. It contains email, text, and call templates that you can use as an agent (or that brokers can provide to their agents, especially those who thrive on scripts) in order to make talking to leads simple, painless, and consistent.



Cloze can also find any action items in messages, such as walkthrough dates or a promise to send a follow-up email after some research, and will set reminders to help ensure you stay on top of your tasks and get everything done.

Following Up Like A Pro: Live Flow And Auto-Flow Options



If you run a team or a brokerage, then you have an additional task on your hands: Assigning new leads to an agent to handle. How do you determine which lead goes to which agent? And that each lead is going to get the best possible service and attention from their assigned agent?

By providing both live flow and auto flow lead options, Cloze can use either AI-driven lead routing to assess each lead and then send it to the best possible agent based on any past relationships,

Lead ponds, geographic distribution, and a number of other variables, at lightning speed. If that agent is unavailable, no problem; Cloze can find the next-best fit instantly.

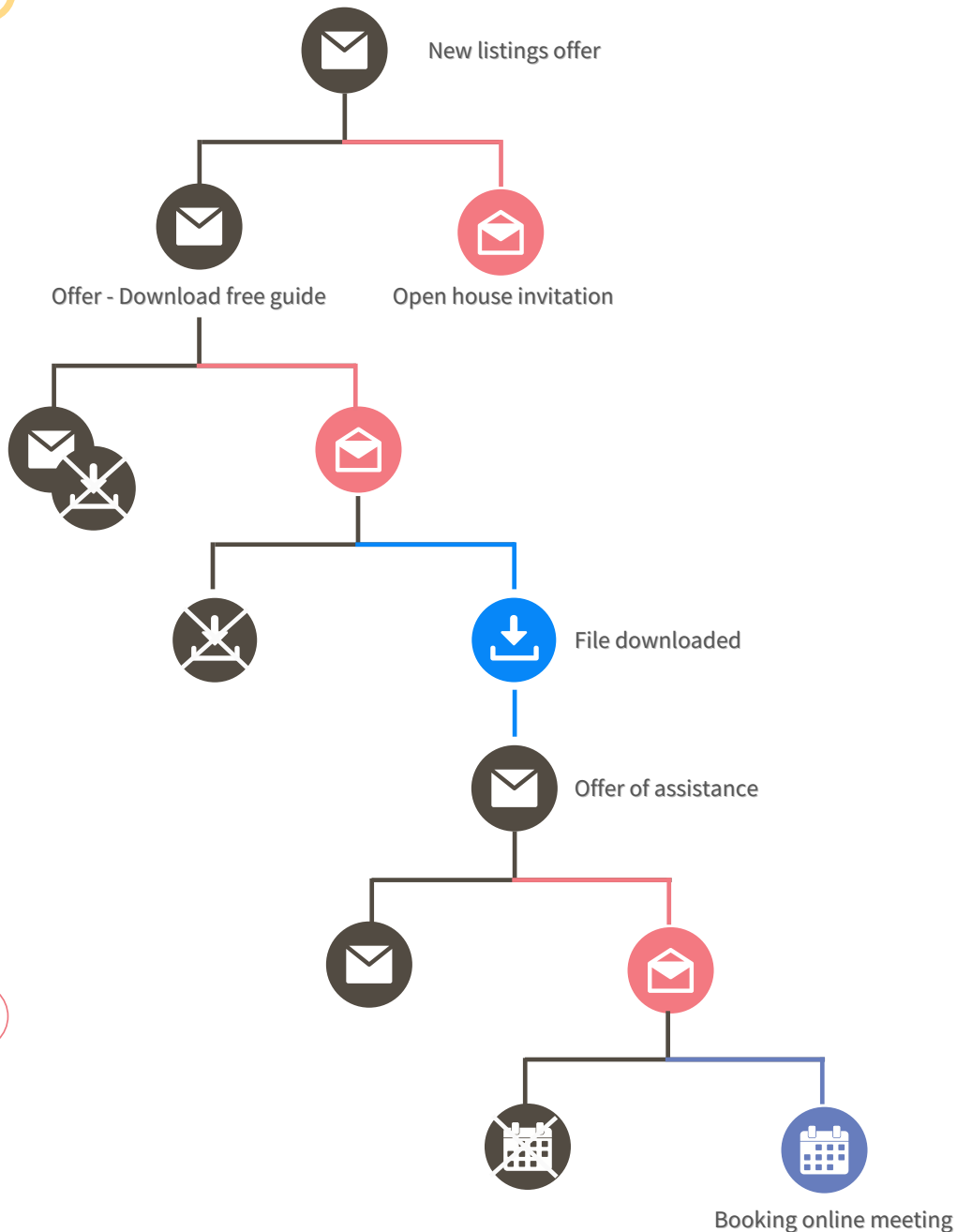
And with the live flow, pushing leads automatically to multiple agents' phones, Cloze establishes a bond between agent and client from the very beginning. Hearing a real human on the other end of the line to answer their burning transaction questions has been the beginning of many beautiful real estate relationships, and Cloze can match the lead with whichever agent is fastest on the draw.



Automating Follow-Up With Drip Campaigns

After you've made initial contact with a lead and introduced yourself, more likely than not, they're not ready to make a move. That's very normal! And it's where follow-up becomes critical—you want that lead to remember how helpful you've been when they are ready to make a move at some point in the future.

Cloze allows you to build drip campaigns to automate follow-ups and to create different follow-up plans and campaigns for different types of leads. This removes the struggle of keeping up with most of your ongoing communication with leads. And if it's a good time for you to reach back out to a lead and check-in, Cloze will remind you to do that, too.





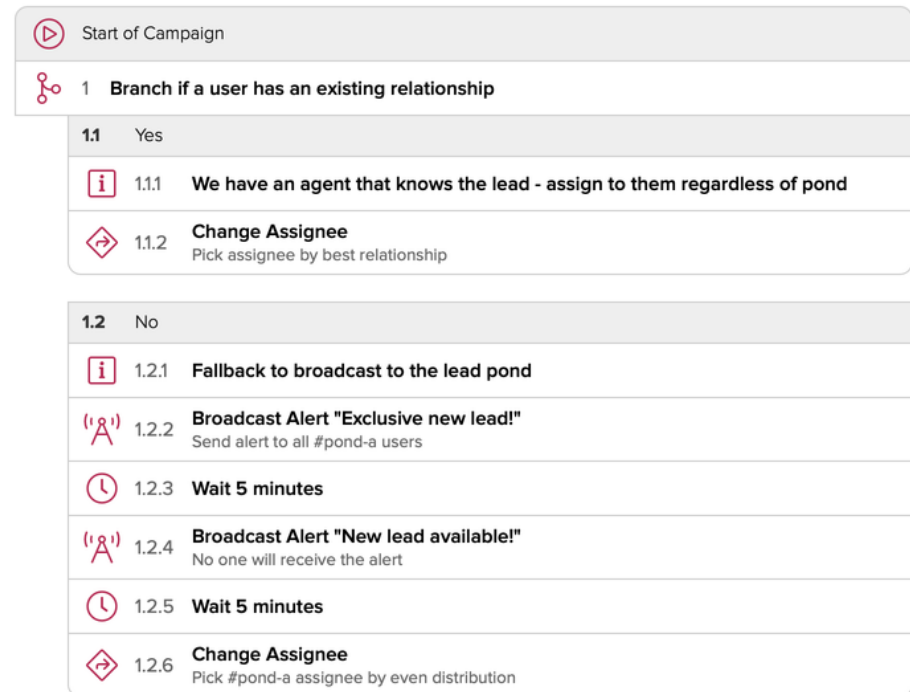
Cloze Lead routing example: "Best Relationship"

Cloze's AI rates the strength of every relationship of every team member automatically. Cloze can then route leads based on the best relationship - the rep or agent that already knows them, for optimal conversion.

In the example below, the Cloze Campaign finds the team member that knows the lead best and assigns it to them. If no one on the team already knows the lead, then it automatically notifies the pond so it can be quickly claimed. If the lead isn't claimed, it is round-robin assigned automatically.



- Finds the agent that knows the lead best, and routes it to them
- If no one knows the lead, it sends push notifications to all team members that can take the lead
- If no team member is available within 5 minutes round-robin assign



Don't forget your best source of leads

It's also important to not forget about your best source of leads: referrals and repeat clients.









The National Association of REALTORS® stats speak for themselves:

- **90%** of buyers would use their agent again or recommend their agent to others
- **47%** of buyers used an agent that was referred to them by a friend, neighbor, or relative
- **13%** used an agent that they had worked with in the past to buy or sell a home.

This means it is essential for agents to stay in touch with their sphere of influence. A sphere of influence (or simply sphere) refers to individuals in your network who provide the highest probability of generating business. This sphere includes clients who have some sway. It can also include

clients who have some sway. It can also include clients with whom you have transacted, those who have provided referrals, and those who rely on you for your expertise, to name a few.

We spend a lot of time and money on leads, despite low conversion ratios:

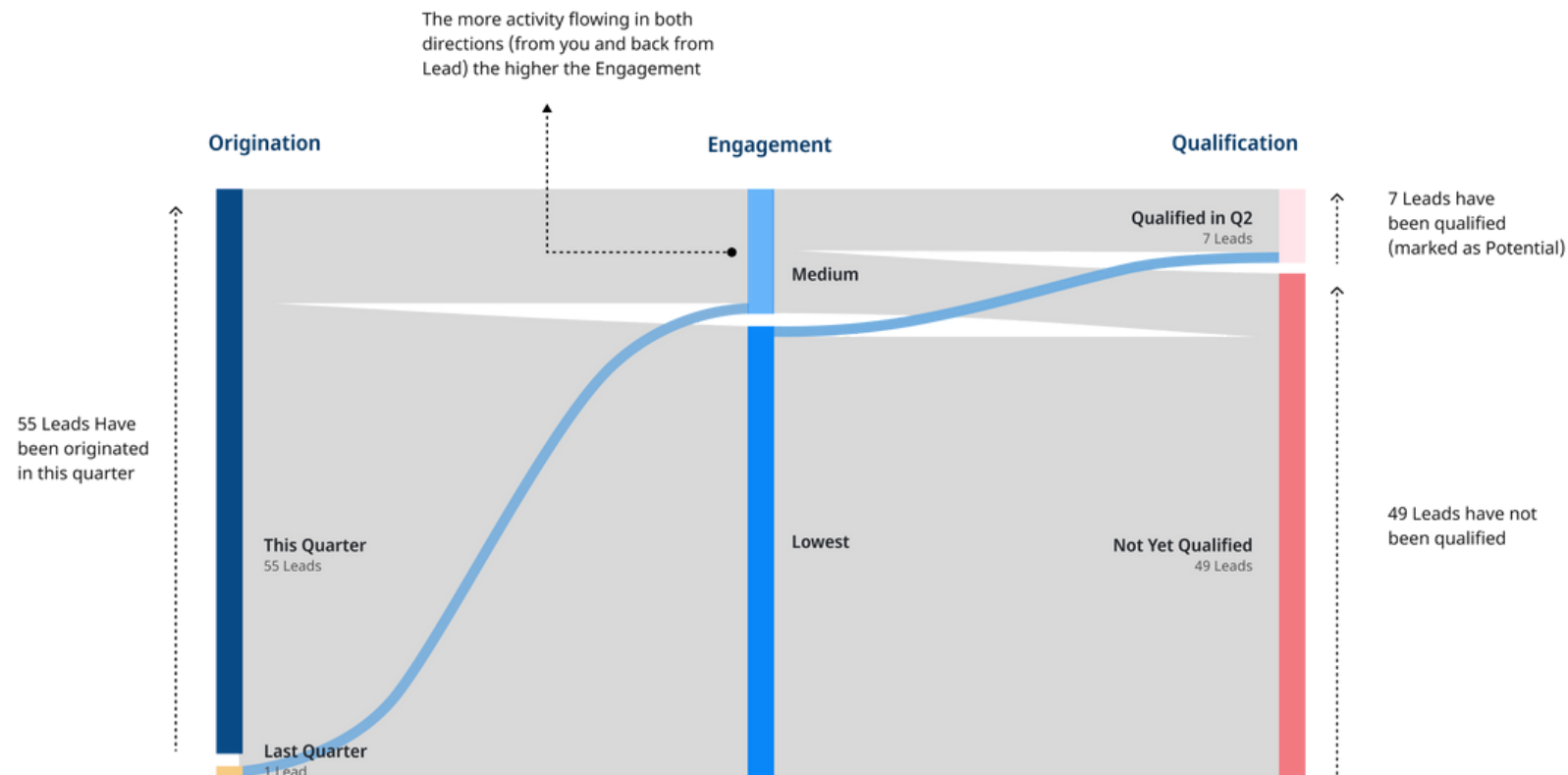
-  Cold direct mail: 2,000 to 1
-  Cold internet lead: 1,600 to 1
-  Advertisement calls: 25 to 1
-  Open houses: 15 to 1
-  Walk-ins: 10 to 1
-  Past buyers: 9 to 1
-  Past sellers: 4 to 1
-  Referrals: 3 to 2

ANALYTICS

Using Analytics To Assess Your Success

One enormous mistake that many agents make is simply assuming that their lead generation efforts are working. You generate a lead, follow-up begins, but then what? Did the agent actually follow up? How long did it take to qualify? Is one source of leads better than another?

Cloze automatically tracks your team's calls, emails, texts, and meetings so you always know the truth.




Cloze Lead Engagement Analytics helps you zero in on the leads that are moving forward and those where engagement is low. Want to know which leads are not getting the attention they deserve? Cloze Lead Analytics shows you.

If you ignore the analytics linked to your leads, you'll never know which campaigns were the most lucrative and which (if any) were complete duds. Build some time into your schedule every week, or at least once a month, to review your lead activity and assess where you should be doubling down and where you might be able to cut your losses.



SUMMARY

Cloze and Placester working in tandem allow you to access the full history of a lead's activities on your Placester website, including all the lead's visits, the properties they viewed in your IDX search, whether they downloaded any special guides or checklists, and exactly when they engaged with you.



When you need your lead generation efforts to work seamlessly, the best way to achieve that goal is through technology. Using products that are already integrated can give you an edge in lead capture, centralization, speed, consistency, automation, follow-up, and analytics, which helps you focus first on the leads who need your attention most critically, winning more business and becoming more productive.

Placester Support Team:

- 800-728-8391
- support@placester.com

Cloze Support Team:

- support@cloze.com

Thank you!

Thanks for checking out The Comprehensive Ebook about answering questions on capturing and converting leads with the Placester website & Cloze CRM.

PLACESTER

