

# 2019 Strategy Guide



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# Map Out Your Business

No one wins a race without having first visualized their goal and the route to it. Winning in real estate is no different. Successful agents anticipate the challenges they'll face because they regularly map the routes to their goals. They regularly visit each step along those routes in their minds.

Your first step in creating the best lead conversion tactics is to create a business plan. Your business plan should always include your lead generation goals. [The SBA.gov](https://www.sba.gov) recommends a business plan that includes –

- **Executive Summary** – a snapshot overview of your real estate business
- **Company Description** – describes what your brokerage, small team, or solo team does
- **Market Analysis** – research on your competitors and homeowners in your farm
- **Funding Request** – how much money you'll need to run your business in the next 3-5 years
- **Financial projections** – supply information such as marketing plans and balance sheets
- **Appendix** – an optional section for miscellaneous documents of importance



# Market Analysis

## Demographics

Before developing your lead generation strategy, you'll need to understand who your potential clients are. Is your market composed of young families or retirees? Green home owners or vacation property owners? First time home buyers will obviously have different needs than retirees. Likewise, first-time home buyers will find their home differently than retirees.



When researching demographics of your farm, consider these attributes leads

- **Large Employers** (Software, Healthcare, Factories, Farming, Hospitality etc.)
- **Average Age**
- **Average Income**
- **Local Attractions** (Landmarks, restaurants,
- **Average Marital Status** (Single, Married, Married with Children, Married & Retired, etc.)
- **Home Types** (Starter home, apartment, condo, luxury, etc.)
- **Changes to the Neighborhood** (gentrification, growth, local industry change, etc.)



# Market Analysis

## Channel Audit

As a real estate agent, you don't have to be everywhere online, you just have to be somewhere. Complete a channel audit to determine where leads in your farm go to search for more information on buying or selling homes. Which channel your targeted audience uses will determine where and how you capture leads. For example, 30 minute informational videos on choosing a mortgage are perfect for YouTube, but may not work well for Instagram. While customer reviews are perfect for your Zillow profile, they don't make great Pinterest Pins.

Start by identifying the channels you already have in place. Do you have website? Zillow or Trulia account? Which social media platforms are you active on?



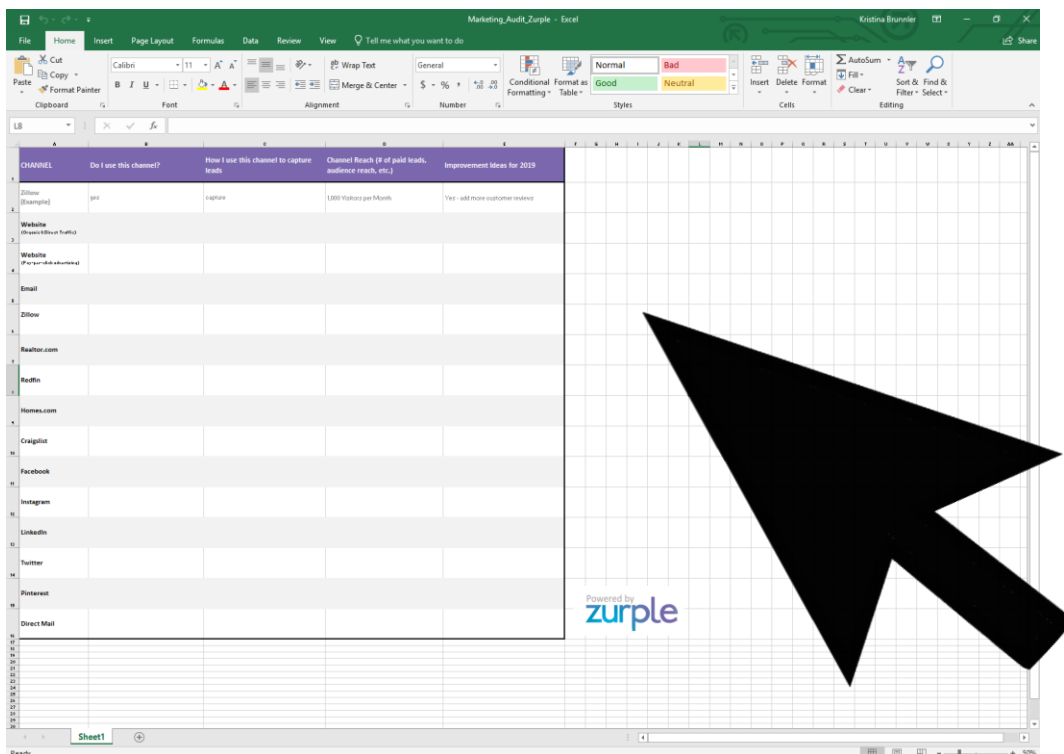
# Market Analysis

## Channel Audit

Start by identifying the channels you already have in place. Do you have website? Zillow or Trulia account? Which social media platforms are you active on?

To download your channel audit worksheet, click the link below. A Microsoft Excel Sheet will open in your downloads folder.

## Tool:



# Market Analysis

## Behavioral Clues

Not only are customers from varying demographics communicating differently about their needs, but they all have diverse online behavioral cues too! Hot, “bottom of funnel” leads may provide a phone number and reach out directly via email while “top of funnel” leads might pursue your website and be “just looking” at properties 10-12 months out. Because your leads have different behaviors, they should be treated differently. For instance, reach out right away to hot “bottom funnel” leads. For “top of funnel leads,” maintain communication by providing relevant content and your value proposition.

Choose a real estate CRM that leverages **Lead Intelligence**. Lead Intelligence can help agents segment their pipeline and work with those buyers and sellers that are ready to work with an agent. With an **intelligent CRM**, real estate agents can enable better lead engagement, contextual personalization, identify transaction-ready leads, and predict cross-sell customers.





# Funding Requests

## Invest in a Real Estate Website

### Create an Online Store

In order to create a sustainable lead generation system you'll have to invest in a website. This website should function as a one-stop-shop for all of your client's needs. Make sure your website has everything one needs to know to help them in their purchasing/selling decisions:

- **Available Listings (Full IDX Search)**
- **Sold Homes**
- **Market conditions**
- **Community Reports**
- **School Reports**
- **Local Attractions**
- **Mortgage Information**
- **Step-By-Step Guides to Buying or Selling**

Be your neighborhood expert. Make your website useful and engaging and you will take away the need for potential clients to ever leave your site for another real estate search engine.



# Funding Requests



## Invest in Multiple Lead Generation Channels

### Diversify

I don't mean to sound like a stock broker, but diversify your approach! The best way to engage potential clients is to use a variety of communication channels:

- **Single emails**
- **Drip email marketing campaigns**
- **Integrated print and email campaigns**
- **Direct mail**
- **Social media** (Blogs, Facebook, Twitter, etc.)

Do your homework, and find out what your target customer is actively using, then use that channel.

# Funding Requests

## Invest in a Marketing Automation Platform

### Automate Your Response

There's hardly any point to implementing a lead-engagement plan if you're not going to respond quickly and consistently. A useful customer service approach is fast and filled with relevant information. Offer ready support, assuring your potential clients that you won't be just a coach who shouts from the sidelines—that you're well prepared to run this marathon with them.

Just like in a race, the first and fastest one usually wins! You have a huge advantage over the competition if you can make “first contact” with any new lead. Prospects are more likely to choose the first agent who connects with them and offers valuable information and services. In 2015, the [National Association of Realtors® survey](#) found that two-thirds of home sellers only contact one agent before selecting the one to assist with their home sale. So, make sure to respond in a timely manner with relevant information.



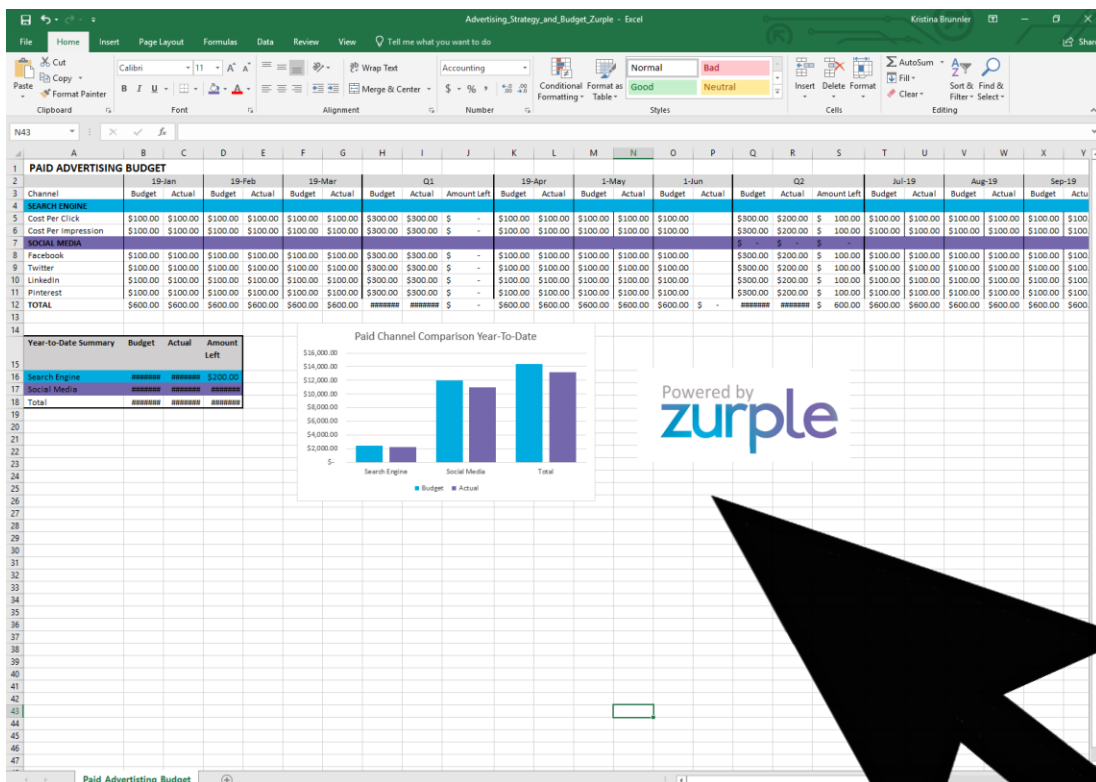
# Funding Requests

## Invest in Paid & Traditional Advertising

List out each paid marketing channel you plan on generating leads through. If you are testing out new paid channels this year, consider planning your yearly budget on a month by month basis.

To download your Paid Advertising Budget, click the link below. A Microsoft Excel Sheet will open in your downloads folder.

## Tool:

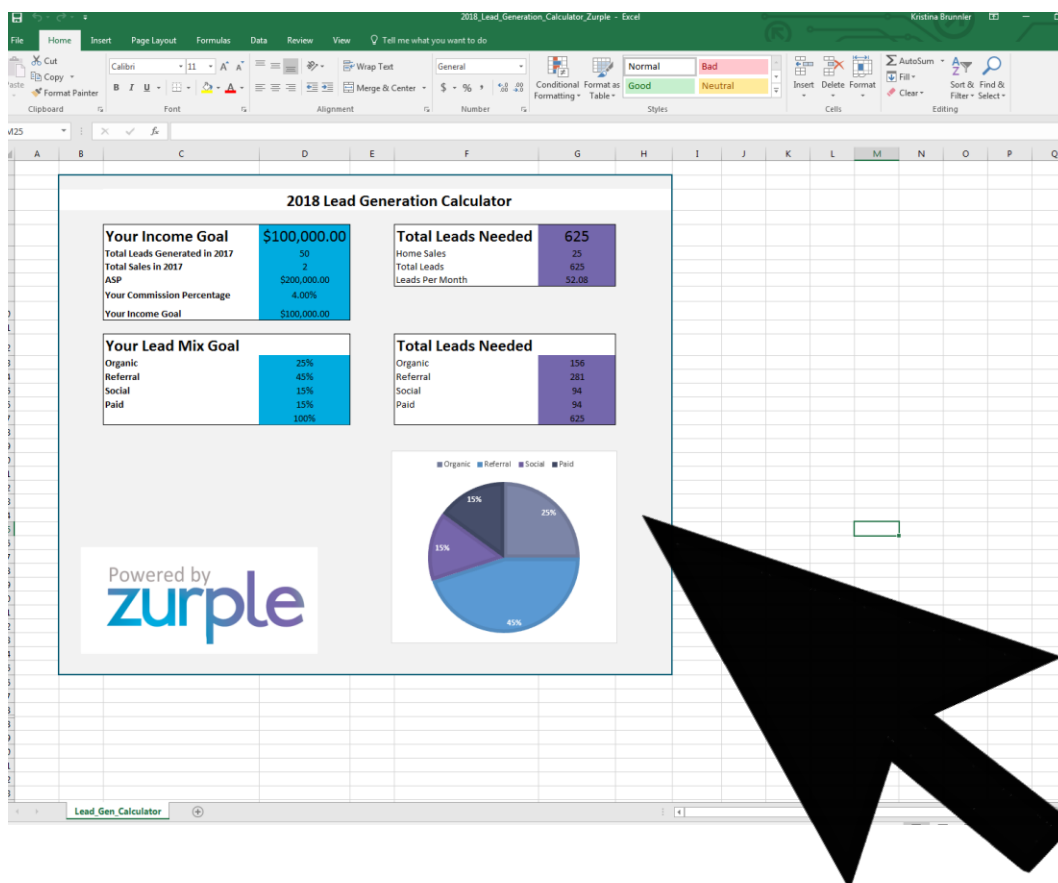


# Financial Projections

Calculate how many leads you'll need in 2019 to meet your income goals. Use the **Lead Generation Calculator** below to calculate how many leads you'll need in 2019 to meet your income goals.

To download your calculator, click the link below. A Microsoft Excel Sheet will open in your downloads folder.

## Tool:



# Ready to Grow Your Business?

See how Zurple's Lead Generation and Lead Intelligence will convert more Leads into Clients

[Click to Learn More](#)