Agent Best Practices (Corefact recipient followup)

Agent receives alert that recipient has checked home value

Did the recipient leave their contact information

No

Search for recipient info in FOREWARN

Yes

Call the recipient and offer a personalized CMA of their property.

- What improvements have they made to their home? Any updates?
- What do they love about their home?
- What would they change about their home?

Set an appointment

Did you set an appointment

No

Offer to send CMA via email

Yes

Prepare CMA and go to appointment

Set an appointment

EMAIL TRACK

Prepare CMA with Moxi Present. Follow up with a phone call the next day and ask for feedback. Set an appointment to view the home in person. If set an appointment, move to appointment track

APPOINTMENT TRACK

Determine if recipient is a seller, buyer, or both!
If they are a seller at this time - Great! Get to Work!
Schedule some time to view properties.

Send a *"thank you"* note.

No appointment set

Add recipient to your regularly scheduled follow up plan, including sending unsolicited CMAs yearly.

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