

CRUSH IT WITH REAL GEEKS 30 DAY PLAN



CONTACT US: ONBOARDING@REALGEEKS.COM

Interactive webpage version of PDF available at:
onboarding.realgeeks.com/next-steps-live/

1

SET UP YOUR CRM

Time to complete: 30 mins ☐

From leads.realgeeks.com complete your Setup Wizard and CRM Customization Checklist.

Download the CRM App from the App Store or Google Play to use your CRM on the go.

2

UPLOAD YOUR CONTACTS

Time to complete: 10 mins ☐

Get **EVERY** contact you have added to your CRM. Past, current, cold, even potential leads that *may* buy or sell a home at some point or **know someone else** looking to do so - friends, family, vet, barber/hair stylist, yard guy, house cleaner, etc.



LEARN HOW - *Interactive 30-Minute Training:*

- ☐ Upload Your Contacts & Generate Opportunities
- ☐ Identify Leads Faster with Organization

3

INVITE & GENERATE CONTACTS

Time to initiate: 30 mins ☐

Drive website traffic using EXISTING contacts:

From leads.realgeeks.com click "Leads List" → eBlast database using "Your Home Search Just Got Easier" template

Drive traffic using SOCIAL MEDIA: Post website, listings, and searches on Facebook to engage "untapped" database



LEARN HOW - *Interactive 30-Minute Training:*

- ☐ Engage Your Database with a Mass Email
- ☐ Tips for Generating Free Leads Through Facebook

4

TURN CONTACTS INTO LEADS

Time to initiate: 1 hour ☐

Keep contacts ACTIVE on your website:

From leads.realgeeks.com click "Leads List" → Save searches for contacts with an email address to start sending automatic property/market updates

Keep contacts ENGAGED with you: From drip.realgeeks.com click "Library" → use Workflow templates to automate email, SMS, and video message communications



LEARN HOW - *Interactive 30-Minute Training:*

- ☐ Adding Leads and Saving Property Searches
- ☐ Automate Communication with Workflows & Drips



KEEP TABS ON YOUR CRM

[Log into your CRM](#) at least once a day to **check your Live Feed for any activity on your website** and any lead behavior/communication. Download the CRM App for easy access on the go! [App Store Download](#) | [Google Play Download](#)