How to use the LEAD TRACKER

1. Track every lead (a lead is anyone talking about your business).

    A. The source is very important - always write down where the lead came from.

    B. The result - what happened with the lead

    C. Always write down a phone number for the lead

2. On the bottom of the tracker separate all leads.

    CCR = Current Client Referral

    PCR = Previous Client Referral

    PC = Previous Client

    PF = Personal Friend

    RLTR = Realtor

    AD = Advertisement / web site / sign / ZILLOW / TRULIA

    BUS = Business People / BARTENDER / LENDERS / CPA'S

    BLDR = Builder

3. Put * in the box next to the number everytime you write a transaction either a listing, a contract on a property, a preapplication, or a full mortgage application.

4. Put a circle around the lead if you are still pursuing it.
   Example - Lead needs to talk to spouse
            Lead wants to wait another month, etc...

5. Track everytime you talk to a lead in the "# calls" box. The more times you call the higher your closing %.

6. Do the Math
   Number of transactions per month divided by number of leads per month.

7. For your coaching call, copy the form and do the totals on the bottom for all sections.

★ CONVERT 30% OF LEADS
        TO BE A GREAT AGENT ★

~~Lender~~ LEAD TRACKER - Sample

Month: October   Year: 2013

TICKLES

*	NAME	SOURCE (in detail)	RESULT OF CALL	PHONE#/ E-MAIL	# CALLS
	① Joe Smith	PC	Refinance	555-226-9452	////
*	2 Jimmy Moe	CCR - Stacy Johnson	New Purchase	555-912-5598	/////
	③ Karen Presley	RLTR - Kate Jones	New Purchase	555-798-5665	///
*	4 Steve Young	CCR - Ernst Hemingway	Pre-app	555-856-3232	//
	5 Jane Happy	BP - Financial Planner	L/M and emailed	555-756-1225	////
	6 Randy Roames	AD - Web	Went with Bank	555-653-4589	//
*	7 John James	PC	Refinance	555-986-2357	/
*	8 George Jungle	CCR - Sam Sims	New Purchase	555-796-3423	/////////
*	9 Nina New	PC	Refinance	555-744-1454	/
	⑩ Bill Boy	RLTR - Susie Cue	Holding off on Buying until March - call then	555-523-3321	/
	11 Leo Low	PCR	L/M	555-369-8521	///
*	12 Paula Paris	PF	Purchase	555-988-8686	/
	13 Fred Goody	PC	L/M	555-896-8523	////
*	14 Sandy Fullerton	PC	Refinance	555-278-2785	//
	15				
	16				
	17				
	18				
	19				
	20				
	21				
	22				
	23				
	24				
	25				

TOTAL

G	3	3	2	2	25	0	5	0	40	40 x 35% = 14 .
	CCR	PCR	PC	PF	RLTR	AD	BUS	BLDR	Total Month	Total Written Transactions 4 / 3 . Deals / Pre-App
L	3	1	5	1	2	1	1		14	Transactions 7 . div. by Leads 14 . = Closing % 50% .
T	3		3	1					7	

L = Leads   T = Transactions   G = Goal
Number of circled Hot Leads at the end of the month: 3

The Perfect Model

⊛ MEANS - LENDER QUALIFIED
DIFFERENT TICKLE SYSTEM
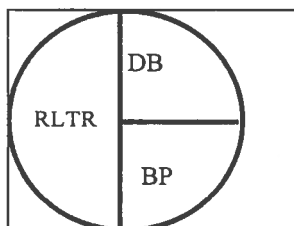
☆ CALL HOT LEADS ONCE WEEK
ON SAME DAY

CHAPEL TICKLE SYSTEM

* 7 CALLS ON A NEW LEAD   ☆ 1 WEEK CALL

* CALL TWICE 1ST DAY REFERRED   ☆ 2ND WEEK CALL

* 3 DAYS IN A ROW - CALL - 1 TIME

LEAD TRACKER

Month: _____ Year: _____   Student Name: _____

*	NAME	SOURCE (in detail)	RESULT OF CALL	PHONE#/ E-MAIL	# CALLS
1					
2					
3					
4					
5					
6					
7					
8					
9					
10					
11					
12					
13					
14					
15					
16					
17					
18					
19					
20					
21					
22					
23					
24					
25					

TOTAL

		CCR	PCR	PC	PF	RLTR	AD	BUS	BLDR	Total Month
G										
L										
T										

_____ x 35% = _____

Total Written Transactions

_____ / _____

Deals / Pre-App

Transactions _____
div. by Leads _____
= Closing % _____

L = Leads   T = Transactions   G = Goal
Number of circled Hot Leads at the end of the month: _____

The Perfect Model