Module 4: Prospecting & Lead Generation

Role-Specific Application Guide & Video Resources

Supplemental Training Material

📺 Video Resources for Module 4

Core Prospecting Training

"4 Simple Steps to Sales Prospecting" - 5 Minute Sales Training
https://www.youtube.com/watch?v=KElECCihYCA
Duration: ~5 minutes
Quick, actionable framework for effective sales prospecting that you can implement immediately.

"Find And Connect With Prospects: Best Sales Prospecting"
https://www.youtube.com/watch?v=gi3NitRv7Uk
Duration: ~15 minutes
Expert insights from Sean Casemore on creating a streamlined and effective prospecting process.

"The Best B2B Sales Prospecting Techniques For SDR/BDRs"
https://www.youtube.com/watch?v=yme7MspfkRg
Duration: ~20 minutes
Five very effective and easy to implement prospecting techniques proven to work for hundreds of sales reps.

"Sales - Prospecting Techniques and Sales"
https://www.youtube.com/watch?v=_X8hRPthmJ8
Duration: ~12 minutes

How to keep your pipeline so full and loaded with opportunities that you create an economy of abundance.

“Prospecting Tips to Boost Your Sales Mindset”
https://www.youtube.com/watch?v=kFytfoRv4SI
Duration: ~10 minutes
It’ s not just about tactics—you need the right prospecting mindset to succeed.

Cold Calling Mastery

“How to Master COLD CALLING in 8 Minutes”
https://www.youtube.com/watch?v=5tJtHLKyjYY
Duration: ~8 minutes
The key to guiding conversations through smart questions that lead prospects to talk about their problems.

“Secrets To Mastering Cold Calling”
https://www.youtube.com/watch?v=pjf5uhOMcTc
Duration: ~15 minutes
How to use language patterns and tonality to cause prospects to want to engage and trigger curiosity.

“10 Years of Expert Cold Calling Advice in 31 Minutes”
https://www.youtube.com/watch?v=hYjbrxLXJIU
Duration: ~31 minutes
Comprehensive cold calling masterclass with 52 minutes of proven B2B sales tips.

“Alex Hormozi’ s Advice on Cold Calling”
https://www.youtube.com/watch?v=jvFLW5EClgk
Duration: ~12 minutes
Alex Hormozi’ s best advice on cold calling that you can use to level up your sales skills.

Real Estate Lead Generation

“25 Ways to Generate Real Estate Leads in 2025”
https://www.youtube.com/watch?v=v91_NNWSxmI
Duration: ~25 minutes

25 proven lead generation strategies specifically for real estate professionals and investors.

🎯 Role-Specific Applications

For Shawn (Head of Lead Response) - PRIMARY FOCUS

Your Role in Module 4:
Shawn, prospecting and lead generation is the **lifeblood** of your role. You are responsible for ensuring a constant flow of new opportunities enters the pipeline. This module is critical for your success.

Key Focus Areas:

1. Speed-to-Lead Prospecting
Your prospecting strategy is built on one principle: **speed wins**. When a lead comes in, you must be the first to contact them.

Inbound Lead Response System:

- Set up instant notifications for all lead sources
- Have pre-written SMS templates ready to send immediately
- Call within 5 minutes, text within 2 minutes
- Use auto-dialers to maximize contact attempts
- Track response time metrics religiously

Lead Source Optimization:

- Website inquiries: Instant alert + immediate call
- Referrals: Same-day contact with warm introduction
- Marketing campaigns: Prioritize by lead score
- Social media inquiries: Respond within 15 minutes
- Event leads: Contact same day while memory is fresh

2. Outbound Prospecting Activities
While inbound leads are priority, you also need outbound prospecting to fill gaps:

Daily Prospecting Block:

- 9:00-10:00 AM: Cold calling to expired listings or FSBOs
- 2:00-3:00 PM: Follow-up calls to unconverted leads
- 4:00-5:00 PM: LinkedIn outreach to real estate investors

Prospecting Metrics to Track:

- Calls made per day (target: 50-75)
- Contacts reached (target: 15-20)
- Conversations held (target: 10-15)
- Appointments set (target: 3-5)
- Conversion rate (contacts → appointments)

3. Multi-Channel Prospecting Approach
Don't rely on just phone calls. Use multiple channels:

Phone: Primary tool for immediate response
SMS: Quick follow-up and appointment reminders
Email: Detailed information and resources
LinkedIn: Connect with real estate investors
Voicemail: Leave compelling callback messages

4. Lead Qualification During Prospecting
As you prospect, quickly qualify using BANT:

- Budget: "What price range are you looking at?"
- Authority: "Are you the sole decision-maker?"
- Need: "What's your investment strategy?"
- Timeline: "When are you looking to close?"

If they don't meet basic criteria, politely exit and move to next prospect.

Shawn's Implementation Checklist:

- [ ] Set up instant lead notifications across all sources
- [ ] Create SMS templates for immediate response
- [ ] Block daily prospecting time (2-3 hours minimum)

- [ ] Build list of 100+ prospects to call weekly
- [ ] Set up auto-dialer or power dialer system
- [ ] Create voicemail scripts that get callbacks
- [ ] Develop LinkedIn connection request templates
- [ ] Track daily prospecting metrics in CRM
- [ ] Review weekly: calls made, contacts, appointments
- [ ] Optimize approach based on conversion data

Shawn's Video Resources:

- Watch "How to Master COLD CALLING in 8 Minutes" daily for first week
- Study "Secrets To Mastering Cold Calling" for tonality techniques
- Review "4 Simple Steps to Sales Prospecting" before each prospecting block

Shawn's Success Metric:
Generate 15-20 qualified appointments per week through combination of inbound response and outbound prospecting. Maintain minute response time on all inbound leads.

For Ronald (Head of Client Relationships) - SUPPORTING ROLE

Your Role in Module 4:
Ronald, your prospecting focus is different from Shawn's. You prospect for **referrals and warm introductions** from your existing client base and network.

Key Focus Areas:

1. Referral Generation System
Your best prospects come from satisfied clients. Build a systematic referral engine:

Post-Closing Referral Ask: Within 7 days of closing, ask every client:

- "Who else do you know who's investing in real estate?"
- "Which real estate agents do you work with regularly?"
- "Are you part of any investor groups or meetups?"

Quarterly Referral Touchpoints:

- Send market updates to past clients
- Include: “We’re looking to help more investors like you”
- Make it easy: “Just reply with their name and I’ll reach out”

Referral Incentive Program:

- Offer: $500 credit on next loan for each funded referral
- Track: Who referred whom in CRM
- Thank: Send personal note + gift for each referral

2. Networking-Based Prospecting
Attend events where your ideal clients gather:

Real Estate Investor Meetups:

- Attend monthly (find on Meetup.com or BiggerPockets)
- Don’t sell—educate and build relationships
- Follow up within 24 hours with LinkedIn connection
- Offer value: Market insights, deal analysis, resources

Real Estate Agent Partnerships:

- Identify top agents in your market
- Offer to co-host investor education events
- Provide pre-approval letters for their investor clients
- Build referral partnership agreements

Property Manager Relationships:

- Property managers know active investors
- Offer to be their preferred lender
- Provide quick pre-approvals for their clients

3. Content-Based Prospecting
Use content to attract warm leads:

LinkedIn Strategy:

- Post 3x per week about real estate investing
- Topics: Market trends, deal analysis, financing tips
- Engage with investor posts and comments
- Connect with 10 new investors per week

Email Newsletter:

- Monthly market update to database
- Include: Rates, market trends, success stories
- Call-to-action: "Reply if you're looking at a deal"

4. Warm Lead Nurturing
Many of your prospects aren't ready immediately:

Nurture Sequence:

- Month 1: Weekly check-ins
- Month 2-3: Bi-weekly value-adds (market data, articles)
- Month 4+: Monthly touchpoints until they're ready

Value-Add Prospecting:

- Send deals you see on market
- Introduce them to agents or contractors
- Provide free deal analysis
- Share investment strategy insights

Ronald's Implementation Checklist:

- [ ] Create referral request script for post-closing
- [ ] Set up quarterly referral campaign in CRM
- [ ] Identify 3 investor meetups to attend monthly
- [ ] Build list of top 20 real estate agents to partner with
- [ ] Develop LinkedIn content calendar (3 posts/week)
- [ ] Create monthly email newsletter template
- [ ] Set up warm lead nurture sequences in CRM

- [ ] Track referral sources and conversion rates
- [ ] Schedule weekly networking time (4-6 hours)
- [ ] Measure: Referrals received, partnerships built, warm leads generated

Ronald's Video Resources:

- Watch "Find And Connect With Prospects" for relationship-building approach
- Study "Prospecting Tips to Boost Your Sales Mindset" for long-term thinking
- Review "25 Ways to Generate Real Estate Leads" for networking ideas

Ronald's Success Metric:
Generate 50% of new opportunities through referrals and warm introductions. Build 10+ active referral partnerships. Maintain 100+ warm leads in nurture pipeline.

For Tamara (Head of Operations) - SUPPORTING ROLE

Your Role in Module 4:
Tamara, your job is to build the **systems and infrastructure** that enable Shawn and Ronald to prospect effectively.

Key Focus Areas:

1. Lead Source Tracking System
Build comprehensive lead source attribution:

CRM Lead Source Fields:

- Primary source (website, referral, event, cold call, etc.)
- Secondary source (specific campaign, partner name, etc.)
- Lead score (hot, warm, cold)
- First contact timestamp
- Response time tracking

Lead Source ROI Dashboard:

- Cost per lead by source
- Conversion rate by source

- Revenue per lead by source
- ROI by marketing channel

2. Prospecting Workflow Automation
Create automated workflows to support prospecting:

Inbound Lead Workflow:

- Lead enters system → Instant notification to Shawn
- If no contact in 5 min → Escalation alert
- If no contact in 30 min → CEO notification
- Automatic SMS sent at 2 minutes
- Automatic email sent at 10 minutes
- Task created for follow-up calls

Outbound Prospecting Workflow:

- Upload prospect list → Auto-assign to Shawn
- Create call tasks with optimal timing
- Track call attempts and dispositions
- Move to nurture sequence after 3 no-answers
- Flag hot prospects for priority follow-up

3. Prospecting Tools & Technology
Implement tools that increase prospecting efficiency:

Essential Tools:

- Auto-dialer or power dialer (increases calls 3-5x)
- Email tracking (know when prospects open emails)
- LinkedIn Sales Navigator (advanced prospect search)
- Lead enrichment tool (append phone/email data)
- SMS platform (bulk texting capability)

Tool Integration:

- All tools must integrate with CRM

- Data flows automatically (no manual entry)
- Unified dashboard for all prospecting activity

4. Prospecting Performance Dashboards
Create visibility into prospecting metrics:

Shawn’s Dashboard:

- Daily: Calls made, contacts, appointments, response time
- Weekly: Conversion rates, lead source performance
- Monthly: Trends, goal attainment, areas for improvement

Ronald’s Dashboard:

- Weekly: Referrals received, networking events attended
- Monthly: Partnership pipeline, warm lead growth
- Quarterly: Referral source analysis, partnership ROI

Team Dashboard:

- Pipeline coverage (# of opportunities vs. goal)
- Lead velocity (speed of new leads entering pipeline)
- Prospecting activity trends
- Forecast based on current prospecting levels

Tamara’s Implementation Checklist:

- [ ] Build comprehensive lead source tracking in CRM
- [ ] Create lead source ROI dashboard
- [ ] Set up instant lead notification system
- [ ] Build inbound lead automation workflows
- [ ] Implement outbound prospecting workflows
- [ ] Research and recommend prospecting tools
- [ ] Integrate tools with CRM
- [ ] Create prospecting performance dashboards
- [ ] Set up weekly prospecting metrics reports

- [ ] Train team on new systems and tools
- [ ] Monitor system performance and optimize

Tamara’s Video Resources:

- Watch “The Best B2B Sales Prospecting Techniques” to understand what systems need to support
- Study prospecting CRM workflow tutorials for your specific platform
- Research sales automation tools and integration options

Tamara’s Success Metric:
100% of leads tracked from source to close. Prospecting systems increase team efficiency by 50%+. Zero leads fall through cracks due to system failures.

For CEO (Strategic Oversight) - LEADERSHIP ROLE

Your Role in Module 4:
As CEO, you set the prospecting strategy and ensure the team has the resources and accountability to execute.

Key Focus Areas:

1. Prospecting Strategy Development
Define the overall prospecting approach:

Lead Generation Budget Allocation:

- Paid advertising: $X per month
- Networking/events: $X per month
- Referral incentives: $X per month
- Technology/tools: $X per month
- Content creation: $X per month

Target Lead Volume:

- Calculate: How many leads needed to hit revenue goals?
- Example: $10Mrevenuegoal \div$100K avg loan = 100 deals

- 100 deals ÷ 25% close rate = 400 qualified leads needed
- 400 qualified leads ÷ 40% qualification rate = 1,000 total leads
- 1,000 leads ÷ 12 months = 83 leads per month needed

Lead Source Strategy:

- Determine optimal mix of inbound vs. outbound
- Identify highest ROI lead sources
- Allocate budget to best-performing channels
- Test new lead sources quarterly

2. Partnership Development Prospecting
Your prospecting focus is strategic partnerships:

Target Partnership Categories:

- Real estate brokerages (bulk referrals)
- Property management companies (investor access)
- Real estate attorneys (deal flow)
- CPAs/financial advisors (client referrals)
- Real estate investment groups (speaking opportunities)

Partnership Prospecting Process:

- Identify top 10 targets in each category
- Personal outreach (don’t delegate first contact)
- Offer value first (education, co-marketing, etc.)
- Build relationship before asking for referrals
- Formalize with partnership agreement

3. Team Prospecting Accountability
Hold team accountable to prospecting metrics:

Weekly Prospecting Review:

- Shawn: Review calls made, contacts, appointments
- Ronald: Review referrals, networking, warm leads

- Tamara: Review system performance, lead source ROI

Monthly Prospecting Planning:

- Set next month’ s prospecting goals
- Allocate budget to highest ROI sources
- Identify obstacles and remove them
- Celebrate wins and learn from losses

4. High-Value Prospect Involvement
For strategic or high-value prospects, you get involved:

CEO Involvement Criteria:

- Deal size over $X threshold
- Strategic partnership opportunity
- Referral from key relationship
- High-profile investor or influencer

CEO Prospecting Activities:

- Attend key industry events and conferences
- Speak at real estate investor meetups
- Publish thought leadership content
- Build relationships with market influencers
- Personally close strategic partnerships

CEO Implementation Checklist:

- [ ] Calculate lead volume needed to hit revenue goals
- [ ] Develop lead generation budget and allocation
- [ ] Identify top 50 strategic partnership targets
- [ ] Create partnership outreach campaign
- [ ] Set team prospecting goals and accountability
- [ ] Schedule weekly prospecting review meetings
- [ ] Define criteria for CEO prospect involvement

- [ ] Develop thought leadership content strategy
- [ ] Identify key industry events to attend
- [ ] Track partnership pipeline and ROI

CEO Video Resources:

- Watch "Sales - Prospecting Techniques and Sales" for abundance mindset
- Study "Prospecting Tips to Boost Your Sales Mindset" for leadership perspective
- Review "25 Ways to Generate Real Estate Leads" for strategic ideas

CEO Success Metric:
Team generates sufficient lead volume to hit 100%+ of revenue goals. Strategic partnerships contribute 30%+ of new opportunities. Prospecting ROI improves quarter-over-quarter.

📊 Prospecting Metrics by Role

Shawn's Key Metrics:

Metric	Daily Target	Weekly Target	Monthly Target
Calls Made	50-75	250-375	1,000-1,500
Contacts Reached	15-20	75-100	300-400
Appointments Set	3-5	15-25	60-100
Response Time	min	min	min

Ronald’s Key Metrics:

Metric	Weekly Target	Monthly Target	Quarterly Target
Referrals Received	3-5	12-20	36-60
Networking Events	2-3	8-12	24-36
New Partnerships	1-2	4-8	12-24
Warm Leads Generated	10-15	40-60	120-180

Tamara’s Key Metrics:

Metric	Target	Measurement
Lead Source Tracking	100%	All leads attributed
System Uptime	99%+	Zero missed leads
Tool Integration	100%	All tools in CRM
Dashboard Accuracy	100%	Real-time data

CEO’s Key Metrics:

Metric	Monthly Target	Quarterly Target	Annual Target
Strategic Partnerships	1-2 new	3-6 new	12-24 new
Partnership Revenue	30% of total	30% of total	30% of total
Lead Volume vs. Goal	100%+	100%+	100%+
Prospecting ROI	Improve 10%	Improve 30%	Improve 100%

🎬 Additional Video Resources by Topic

For Cold Calling:

- "Alex Hormozi' s Advice on Cold Calling"
- "10 Years of Expert Cold Calling Advice in 31 Minutes"
- "Secrets To Mastering Cold Calling"

For Referral Generation:

- Search YouTube: "referral generation system"
- Search YouTube: "asking for referrals sales"
- Search YouTube: "client referral program"

For LinkedIn Prospecting:

- Search YouTube: "LinkedIn Sales Navigator tutorial"
- Search YouTube: "LinkedIn prospecting strategy"
- Search YouTube: "LinkedIn outreach messages"

For Real Estate Networking:

- Search YouTube: "real estate investor networking"
- Search YouTube: "building real estate partnerships"
- Search YouTube: "real estate agent referral partnerships"

💡 Implementation Timeline

Week 1 (All Roles):

- Complete Module 4 training
- Watch assigned video resources
- Review current prospecting approach

- Identify gaps and opportunities

Week 2 (Shawn):

- Implement instant lead notification system
- Block daily prospecting time
- Start tracking prospecting metrics
- Optimize response time to minutes

Week 2 (Ronald):

- Create referral request script
- Identify networking events to attend
- Build LinkedIn content calendar
- Set up warm lead nurture sequences

Week 2 (Tamara):

- Build lead source tracking
- Set up prospecting workflows
- Create performance dashboards
- Research and recommend tools

Week 2 (CEO):

- Calculate lead volume requirements
- Develop partnership target list
- Set team prospecting goals
- Schedule accountability meetings

Ongoing (All Roles):

- Daily prospecting activities
- Weekly metrics review
- Monthly strategy optimization
- Quarterly goal setting

🎯 Key Takeaways by Role

Shawn: You are the prospecting engine. Your speed and volume create the pipeline that fuels the business. Master cold calling, optimize response time, and track your metrics religiously.

Ronald: You are the relationship prospector. Your referrals and warm introductions are the highest-quality leads. Build your network, ask for referrals systematically, and nurture long-term relationships.

Tamara: You are the prospecting systems architect. Your tools and workflows enable Shawn and Ronald to prospect efficiently. Build systems that scale, track everything, and optimize based on data.

CEO: You are the prospecting strategist. Your partnerships and thought leadership open doors others can't. Set the strategy, hold the team accountable, and personally close strategic relationships.

📝 Next Steps

Shawn:

1. Set up instant lead notifications today
2. Block prospecting time on calendar for next 30 days
3. Create call scripts and SMS templates
4. Start tracking daily metrics
5. Watch cold calling videos and practice

Ronald:

1. Schedule 3 networking events for next month
2. Create referral request script
3. Build list of 20 agents to partner with
4. Start LinkedIn content calendar
5. Set up warm lead nurture sequences

Tamara:

1. Audit current lead source tracking
2. Build lead source ROI dashboard
3. Set up instant lead notification system
4. Research prospecting tools
5. Create team prospecting dashboards

CEO:

1. Calculate lead volume needed for goals
2. Develop partnership target list
3. Set team prospecting goals
4. Schedule weekly prospecting reviews
5. Plan strategic networking activities

This supplemental guide should be used alongside the Module 4 Training Guide and Worksheet. Each team member should focus on their specific role sections while understanding how their prospecting activities contribute to the overall pipeline.