

Marketing Day 1

Take Action Items

General Information

Below is a checklist of all your Day 1 Take action items. Make sure you take the time to document over the next weeks any questions and issues you encounter and make adjustments to your marketing calendar as needed. You Got This!

Day 1 Checklist

| Action Item |
|-------------|
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- Pull Data from Lead Source and input on spreadsheet
 - First and Last name of Homeowner(s)
 - Property Address
 - Lienholder Name
- Skip Trace all Leads
 - Update Mailing Address if applicable
 - Document Phone Number(s)
 - Document Email Address(es)
 - Document Social Media Profile(s)
- Input Leads into CRM
 - Cue Ringless Voicemail
 - Cue Automated Emails
- Send Letters
 - Print, Stuff and Stamp Letters
 - Handwrite envelopes
- Call Leads
- Update CRM with responses, updates, appointments, etc.
- Document Metrics