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How to Successfully Communicate with Leads

Loan officer email and SMS pointers for responding to leads that come into your pipeline, as well as how to set yourself up for long-term success with a proactive follow-up strategy.

Do you have a successful lead communication strategy for turning prospective borrowers into customers? How you initially respond to and manage the leads within your pipeline can be the difference between a closed deal and a missed opportunity, but knowing how to make a stellar first impression and continuously engage with a lead can be a challenge. First impressions are everything, the quicker you respond and the number of follow-up touchpoints you create, the higher the chance of successfully connecting with and converting potential borrowers.

Communication best practices

- It's okay to respond right away

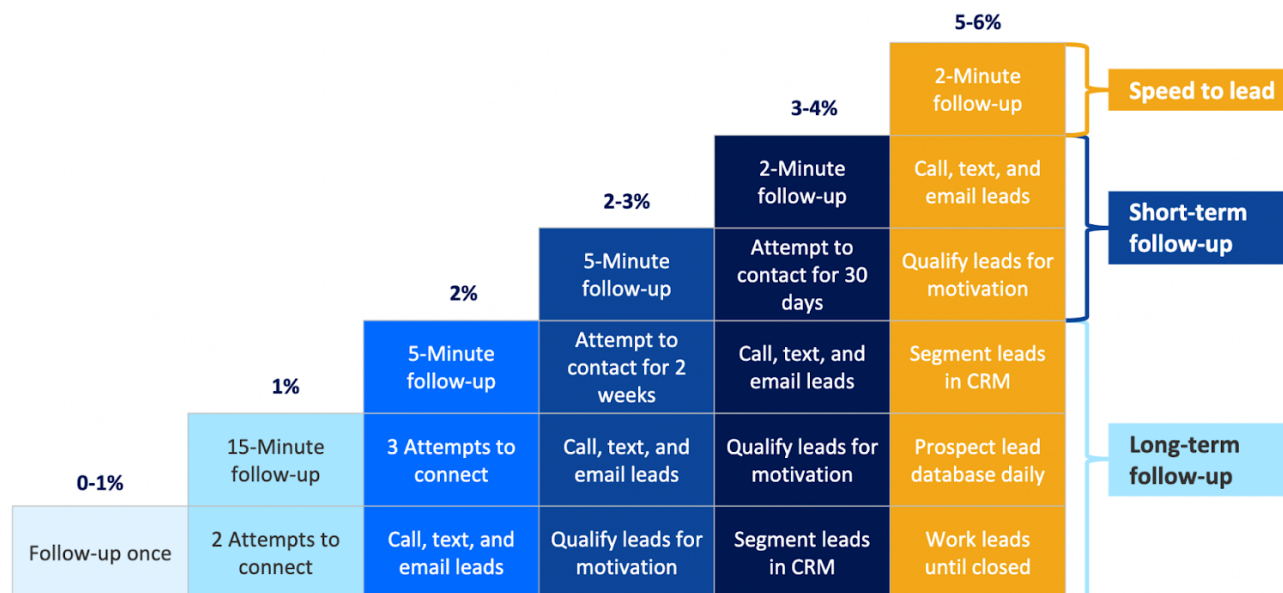


The odds of qualifying a lead if called within ten minutes of the initial lead contact versus five minutes **decreases** by 400%

- Include a call to action
- Don't underestimate the impact of a previous touchpoint you had, they may simply be taking time to make a decision
- Be sure to always include your name at the beginning of your messages
- Refrain from sending negative and/or confidential information via SMS (for additional information on text messaging best practices, check out this [handout](#))
- Use open-ended questions to keep the conversation moving
- Make your messages conversational yet brief and to the point
- Utilize your CRM tool to create follow-up reminders
- Set up automated responses so they will get an immediate reply that assures them you will respond as soon as you can

Increased conversion

It's no secret that by leveraging a mix of platform touchpoints (ie: phone call, email, and SMS) you'll give yourself the best chance to connect with your leads and potentially increase your contact and conversion rates.



By developing a long-term follow-up strategy plan that begins on ‘Day 1’, you can make sure you are staying top-of-mind with your prospects as they decide the next steps for financing their new home.



Most businesses find more success in their follow-up after 6-8 **attempts** to engage with their prospects.

Day 1

Phone call (call immediately, don't leave a voicemail)
Phone call (1 minute later, leave a voicemail)
SMS
Email
Phone call (end of the day, don't leave a voicemail)

Day 2-30

Phone call (call immediately, don't leave a voicemail)
Phone call
SMS
Email

Day 30+

Phone call (monthly check-in)

Talking points

Reference these bullets as key messaging examples to use during your phone call, email, and SMS follow-up.

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Day 1

Introduce yourself, share the reason for your message, and end with a CTA

Hi **{borrower name}**, it's **{your name}**. Congrats on taking the 1st step toward buying a home! Was looking to get some time on the calendar to chat about our local housing market. Feel free to give me a call when you're free, I'll plan to check in again later this afternoon.

Hi **{borrower name}**, it's **{your name}**. I received your inquiry and wanted to set up a quick call to discuss what brought you to Zillow today. Do you have a day that works best for you? Let me know.

Hey **{borrower name}**, **{your name}** here. Whether you're looking to buy today or just get some basic home financing information, I'm here to help! Let me know the best day for us to connect. Looking forward to hearing back from you.

Day 2-30

Include follow-up in messaging, share next steps, and end with a CTA

Hi **{borrower name}**, it's **{your name}**. Following up on my last message to set up a quick, obligation-free, call with you to discuss your home buying goals and how I can best support you during this process. What day this week works best for you?

Hi **{borrower name}**, it's **{your name}**. Received your inquiry a few days ago and wanted to see when's the best time for us to sync up?

Hey **{borrower name}**, it's **{your name}**. Wanted to float this to the top of your inbox to make sure you receive the information you're looking for. Give me a call when you're available to chat more.

Day 30+

Check-in how the home search is going, show up as an advocate and educator to them, and end with a CTA

Hi **{borrower name}**, it's **{your name}**. How's the home search going? I wanted to see if you were still interested in chatting more about your home financing options? Let me know if you need anything from me in the meantime or want to hop on a quick call.

Hi **{borrower name}**, it's **{your name}**. How's everything going with your home search? As you continue to accomplish steps in the home buying process, I wanted to send over this helpful **article** that breaks down closing costs so you can create a more accurate budget for your dream home. Give me a call when you're ready to take the next step on getting pre-approved.

Hey **{borrower name}**, this is **{your name}** a lender located in **{your market}**. Just wanted to check in to see how your home search is going. You don't have to be 100% ready to buy to get pre-approved, let me know a day that works best for you so we can chat more on this subject.

Hey **{borrower name}**, it's **{your name}**. There are many financing options out there, and the process can often be daunting. I would love to set up some time to put together a game plan designed for your specific wants and needs. Give me a call back or shoot me a text at **{your phone number}** so we can chat more.

Summary

As tedious as it can be to send comms over and over again to prospects and customers only to hear nothing back, it's also an integral part of being a lender. Some have funded units 12, 18, 24 months, and more, after having kept those borrowers on drip campaigns despite receiving no feedback from them. Email is an increasingly preferred communication method, but it most successfully works hand in hand with phone calls and text messages to keep your interactions personal.

For more information on lead communication best practices - contact your dedicated business consultant.

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