

Bold Pivot SmartPlan

By Shannon Dager

#1

Make a Call

Call {contact.first.name} @ {contact.phone}

Day: 1

Task Name*

Call {contact.first.name} @ {contact.phone}

Task Description

Call and do a care call. Let them know,,,, "Hi {contact.first.name} . I just wanted to check in with you and see how you are doing? I know that your home is your biggest investment and I don't want you to worry about the market right now so I am going to make a custom neighborhood site for you to check anything that is for sale or has sold and you can look at your neighborhood anytime. It's just a small way I can help people in this time so please no it's a no obligation service."

Due in (days)*

Today

#2

Create Task

Set up {contact.first.name} {contact.last.name} on monthly neighborhood nurture

Day: 1

Task Type

Non Touch

Task Name*

Set up

{contact.first.name} {contact.last.name} on monthly neighborhood nurture

Task Description

Follow up a phone call and check to make sure that they have the correct neighborhood set because the Neighborhood Nurture goes out tomorrow!!!

#3

Set Delay

1 Days

Day: 1

Due in (days)*

*Maximum of 30 days

#4

Add to SmartPlan

My Monthly Neighborhood Nurture

Day: 2

Add to SmartPlan*

My Monthly Neighborhood Nurture

#5

Set Delay

14 Days

Day: 2

Due in (days)*

*Maximum of 30 days

#6

Send SMS/MMS

Hi {contact.first.name} . I just wanted to see if everything was still ok with you and your family. You were on my mind. Let me know if I can do anything for you. BTW I am at work and so I am using my work laptop to text. This cell may look strange. Call my personal cell if you have time to chat but save this number as my work number if you would like. I can only text here. :)

Day: 16

From*

Message Type

Static

Text*

Hi {contact.first.name} . I just wanted to see if everything was still ok with you and your family. You were on my mind. Let me know if I can do anything for you. BTW I am at work and so I am using my work laptop to text. This cell may look strange. Call my personal cell if you have time to chat but save this number as my work number if you would like. I can only text here. :)

#7

Set Delay

30 Days

Day: 16

Due in (days)*

*Maximum of 30 days

#8

Send Email

Home info

Day: 46

Email Type

Simple

Reply-to*

To update your Command Email address, please go to [Settings](#).

Subject*

Email Content

{f.}

Hey {contact.first.name} . I just wanted to check in and see if you are enjoying the information on your community sales. Let me know if you want me to add other areas. I hope it's keeping you comforted to be informed. Let's chat soon!

#9

Set Delay

30 Days

Day: 46

Due in (days)*

*Maximum of 30 days

#10

Send Email

Referral

Day: 76

Email Type

Simple

Reply-to*

To update your Command Email address, please go to [Settings](#).

Subject*

Email Content

{f.}

Hey {contact.first.name} . I was wondering if you had anyone you knew thinking of buying or selling. I'm really trying to grow my business and wanted to ask if you'd refer me to anyone you

know. I know the time may not be now but keep me in mind for the future or reach out if I can help someone.

Thanks for considering me and I promise to take care of your referrals as if they were my own family!

#11

Create Task

Check on {contact.last.name} {contact.first.name} and review their SmartPlan needs

Day: 76

Task Type

Non Touch

Touch

Task Name*

Check on

{contact.last.name}

{contact.first.name}

and review their SmartPlan needs

{f.}

Task Description

Example: Call {contact.first.name} {contact.phone}