Leads to Deals Blueprint

💡 Time is one of your most valuable assets in today's competitive real estate market. Managing leads, follow-ups, and manual tasks can take you away from what you do best—closing deals and building relationships. This guide will teach you how to automate your lead generation, follow-ups, and verification processes using Meta Ads and CRM software. By the end of this guide, you'll know exactly how to set up an efficient, quality-focused system that gets you qualified leads, appointments, and, eventually, more deals.

Step 1: Running Ads

1.1 Create a Meta Ads Account

1. **Go to business.facebook.com**
    - If you don't have a Facebook business account, go to **business.facebook.com** and click **"Create Account."**
    - Follow the on-screen prompts to enter your business details (name, address, etc.) and complete the setup.
2. **Set Up a Meta Ads Account**
    - Once your business account is created, go to **Ads Manager** by navigating to **facebook.com/adsmanager**.
    - Click on **"Create"** to start a new ad account. Follow the steps to set it up by adding payment information like a credit card or PayPal.

1.2 Setting Up Your Campaign

1. **Click "Create" in Ads Manager to Start a New Campaign**
   - You'll be presented with a list of campaign objectives.
2. **Choose "Lead Generation" as the Campaign Objective**
   - This ensures that the ads are optimized for collecting leads.
3. **Name Your Campaign**
   - Use a descriptive name like **"Real Estate Leads - August 2024"** to keep things organized.
4. **Set Campaign Budget and Schedule**
   - Choose between a **Daily Budget** or a **Lifetime Budget**.
   - For beginners, a daily budget of **$20-30** is a good start.
   - Set your schedule to **run the ads continuously** or choose start and end dates. For example, set it to run from **August 1st to August 31st**.

1.3 Defining Your Target Audience

1. **Set the Location Targeting**
   - In Ads Manager, under the **"Location"** section, enter the city or area where you want to target leads (e.g., **Los Angeles, CA**). You can also add a radius around the city.
2. **Specify the Age Range**
   - Set the **minimum and maximum age** for your audience. For real estate, you might choose **25-65**.
3. **Choose Detailed Targeting Based on Interests and Behaviours**
   - Click on **"Detailed Targeting"** and add interests related to real estate, such as **"Real Estate," "House Hunting,"** or **"First-Time Homebuyer."**
   - You can also target based on **behaviours**, like those who recently moved or are likely to engage with real estate content.
4. **Create Custom Audiences (Optional)**

- If you already have a list of contacts or website visitors, create a **Custom Audience** to retarget them.
- Go to **"Audiences"** in Ads Manager and click **"Create Audience" > "Custom Audience."** Follow the prompts to upload your list or set up website retargeting.

1.4 Creating Your Ad Creative

1. **Select the Ad Format (Single Image, Video, or Carousel)**
   - If you're starting, **Single Image** is the simplest option.
2. **Upload a High-Quality Image**
   - Use a **clear, bright image** of real estate (e.g., a house or happy family in front of a home). Make sure the image is at least **1080×1080 pixels**.
3. **Write Your Ad Copy (Headline, Text, and Call to Action)**
   - **Headline Example**: "Get a Free Home Valuation Today!"
   - **Text Example**: "Thinking of selling your home? Please find out how much it's worth with our free valuation service. Click to get started now!"
   - **Call to Action Button**: Choose **"Learn More"** or **"Get Quote"** as the call to action.

1.5 Creating a Lead Form

1. **Click "Create New Form" during the Ad Setup**
   - Select **"Create New Form"** and give it a name like **"Real Estate Leads Form."**
2. **Add a Headline to the Form**
   - Example: **"Get Your Free Home Valuation Today!"**
3. **Add Form Fields to Collect Information**
   - Include **Name, Email, Phone Number**, and a qualifying question, "**Are you looking to buy or sell in the next six months?"**

4. **Set Up the Privacy Policy**
    - Link to your **privacy policy**. If you don't have one, use an accessible privacy policy generator online and host it on your website.
5. **Customize the Thank You Screen**
    - After someone submits the form, add a thank you message like **"Thank you for your interest! We'll contact you soon."**

1.6 Launching the Campaign

1. **Click "Publish" to Launch Your Campaign**
    - After completing all the steps, click **"Publish"** to make your ad live.
2. **Monitor Ad Performance Daily**
    - Go to **Ads Manager** to view metrics like **Cost Per Lead, Click-Through Rate**, and **Number of Leads Collected**. For reference, here are concise explanations and ideal ranges for these metrics:
    - **Cost Per Lead (CPL)**
        - **Definition**: The average cost to acquire one lead through an ad campaign.
        - **Ideal Range**: Depends on the industry, but typically:
        - **Real Estate**: $20–$50
        - **E-commerce**: $1–$10
        - **Coaching/Consulting**: $30–$100
    - **Click-Through Rate (CTR)**
        - **Definition**: The percentage of people who clicked on the ad after seeing it.
        - **Ideal Range**:
        - **Search Ads**: 3%–5%
        - **Display Ads**: 0.5%–1%

    - **Social Media Ads**: 1%–3%
- **Number of Leads Collected**
    - **Definition**: The total number of leads gathered during a campaign.
    - **Ideal Range**: Varies by ad spend, campaign goal, and niche.

3. **Make Adjustments as Needed**
    - If your ads aren't performing well, consider **changing the image, adjusting the audience**, or **increasing the budget.**

Step 2: Qualification and Nurturing

2.1 Collecting Lead Information Through the Opt-In Form

1. **Make Sure the Form Fields Are Simple and Relevant**
    - Keep it to **3-4 fields maximum** (e.g., **Name, Email, Phone Number, Selling Timeline**).
2. **Qualifying Questions on the Form**
    - Add questions like **"Are you looking to buy or sell in the next six months?"** This helps filter out leads who may not be ready to take action.

2.2 Automated Follow-Up Sequences

1. **Set Up Automated Thank-You Messages Using a preferred CRM software**
    - Use **preferred CRM software** to send an automatic thank-you message after someone fills out the form. For example, **"Thank you for your interest! We'll reach out soon."**
2. **Create a Follow-Up Sequence for Nurturing the Leads**
    - Set up a sequence to send **2-3 follow-up emails or texts** over the next **7-10 days**.
    - **Email Examples**:

- **Day 1**: "Thanks for your interest! Here's what you can expect next."
- **Day 3**: "Are you still considering selling your home? Let's talk about your options."

Step 3: Personal Authentication by an ISA

3.1 Assign Leads to an Inside Sales Agent (ISA)

1. **Automatically Assign Leads to the ISA through your preferred CRM software.**
   - Set up an **automation rule that suits your requirement** to assign new leads to the ISA as they come in, as CRM software has different automation and notification methods. For example, click here to see an example of one of the CRM software applications called "Go High Level."
2. **Notify the ISA When a New Lead Is Assigned**
   - Use the preferred CRM software's **notification feature** to send a text or email alert to the ISA whenever a new lead is assigned.

3.2 Verifying the Lead Over the Phone

1. **Prepare the Lead Verification Script**
   - The ISA should use a script that covers the basics, and the exact script will vary based on the nature of the ads. For example, if you run an ad targeting CMA, your ISA script must reflect that.
   - **"Hi, this is [Name] from [Company]. You recently requested information about selling your home."**
   - **"Are you still interested in moving forward in the next six months?"**
   - **"Can you confirm the property details and your preferred contact time?"**
2. **Mark the Lead as Verified or Unqualified in the CRM**

- If the lead is serious, mark it as **"Verified"** in your **preferred CRM software**.
- If they aren't ready to proceed, mark them as **"Not Qualified"** and add them to a **nurture sequence.**

3.3 Scheduling an Appointment

1. **Set Up a Calendar in your preferred CRM software for Appointment Booking**
2. **Send an Appointment Confirmation to the Lead**
   - After booking, send a **confirmation email and SMS** to the lead with the date and time of the appointment.

Step 4: CRM Integration and Notification System

4.1 Using CRM Software to Manage Leads

Please remember that there are multiple CRMs you can choose from; here, we are detailing the workings of GoHighLevel as the CRM.

1. **Set Up GoHighLevel as the CRM**
   - Go to **Settings** in GoHighLevel and create a **New Pipeline** to manage your leads.
2. **Organize Leads in Stages (e.g., New Lead, Verified, Appointment Set)**
   - Use the **Pipeline Stages** in GoHighLevel to categorize leads based on their status.

4.2 Setting Up Automated Notifications

1. **Configure GoHighLevel to Send Real-Time Alerts**

- Set up **automated alerts** in GoHighLevel to notify your team whenever a lead is verified or an appointment is scheduled.

2. **Receive Notifications on Your Phone or Email**
    - Make sure the alerts are set to be sent to your **phone, email**, or **CRM dashboard** for easy access.