

Converting Leads to Listings

Percy 101



Presented by:

Brandon Carroll

VP, Customer Success

brandon@percy.ai

First, a quick poll to
see where we stand as
an audience today!

POLL

How familiar is everyone with Percy?

- A. Very Familiar
- B. Moderately Familiar
- C. Not Familiar At All

How familiar is everyone here with Percy?

Training Agenda

Converting Leads to Listings

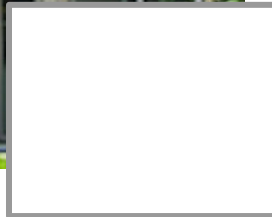
- Overview of Percy
- Seller Leads: An Amazing Website
- How To: Get Seller Leads
- I Have A Lead, Now What?
- Summary + Next Steps



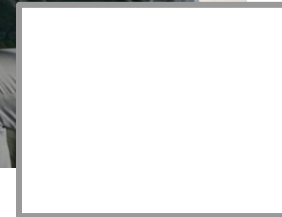
Overview of Percy

WHO IS THE MOST VALUABLE LEAD?

Buyer Lead?

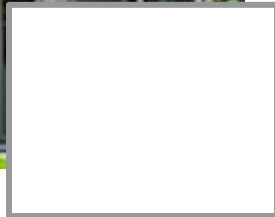


Seller Lead?



WHO IS THE MOST VALUABLE LEAD?

Buyer Lead?



Seller Lead?

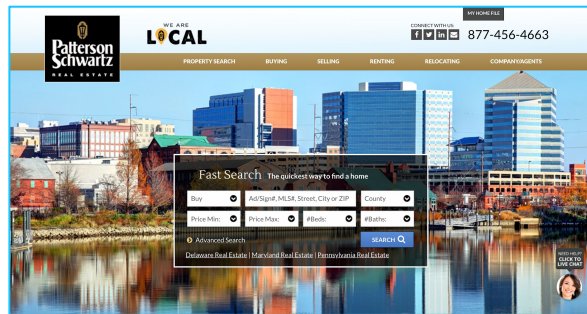


But what do Agents and Brokerages typically do?

They Prioritize the Buyer Experience

GREAT

Buyer Experience



Search Properties - Brokerages and Agents spend most of their marketing budget on tools like Zillow to attract Buyer leads and on a website that focuses primarily on the User Experience for Buyers.

POOR

Seller Experience

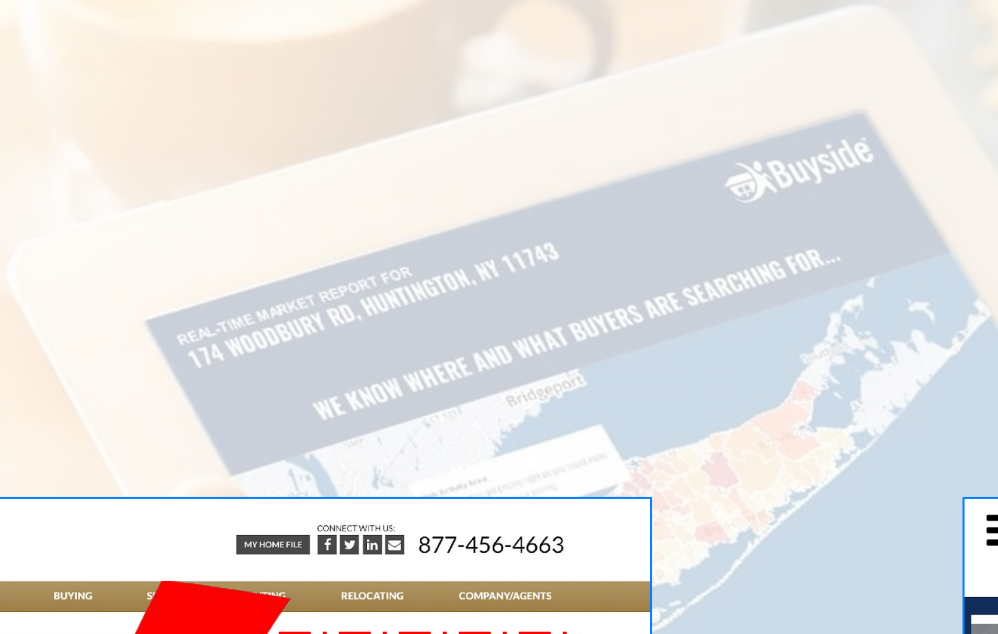


Poor User Experiences:

- Nothing
- Contact Forms
- Search for your next home
- 10 Activities to get your home ready for sale

So, we asked ourselves:

What if there was a better way?



Patterson Schwartz REAL ESTATE WHY PATTERSON-SCHWARTZ

CONNECT WITH US: 877-456-4663

PROPERTY SEARCH BUYING SELLING FINANCING RELOCATING COMPANY/AGENTS

Why Choose Patterson-Schwartz To Sell Your Home?

Selecting a real estate company to work with you on the sale of your home may seem a bit overwhelming. To help make the choice easier, we've outlined the key to why you should list your home with Patterson-Schwartz:

The Best Sales Associates in the Industry

At Patterson-Schwartz our team of over 100 professional Sales Associates is our greatest asset. We attract the most professional and knowledgeable Sales Associates because of our commitment to professional training and coaching, creative marketing programs and sophisticated technology. This means that you will have the very best agent working for you.

A Commitment to Exceeding Expectations

Uncompromising client service is our mantra. We work with you as a buyer and seller upon closing of their transaction and assist you in determining the best idea of how much we value this input. Charlie Schwartz, our President, makes this his personal priority. All surveys are returned directly to his office. Last year, we met or exceeded our client's expectations 98% of the time.

The Market Leader

For many decades we have been the area's dominant real estate company. Our Sales Associates, employees and management team. In fact, our Sales Associates in the area will work with a Patterson-Schwartz Sales Associate.

A Company that Adapts to the Market

Keeping an eye on key real estate market indicators allows us to know the pulse of the market place. The market is forever changing and the needs of our consumer are as well. The marketing plan that a Patterson-Schwartz Sales Associate will develop for your property will address both of these factors.

Our Value Proposition

At Patterson-Schwartz, we recognize that every property is unique and each owner's motivation for selling may be very different. Your Patterson-Schwartz Sales Associate will customize a marketing plan for your property so that it meets and hopefully exceeds your expectations. You can expect hands-on management of the sales process from Agreement of Sale, negotiation of Agreement of Sale, troubleshooting and closing of the transaction. And, we believe so strongly in our value proposition that we offer the Patterson-Schwartz Promise which states that if at any time you are not satisfied with the expert guidance and service you receive, you may fire us with 24 hours' notice.

5 REASONS TO SELL NOW... AND MORE

To help you get started, we've outlined the key steps to selling and the ways that we can provide assistance in our seller's guide.

[FIND OUT MORE](#)

NEED HELP? CLICK TO LIVE CHAT

FINANCING

FAIRWAY
INDEPENDENT MORTGAGE CORPORATION
Great Loan programs & mortgage options!
[Click Here to Apply Online](#)

Approval fees have been paid by the Fairway Independent Mortgage Company. NML 52289

Michael Ehrlich
REALTOR®
Phone: (516) 666-6746
Ehrlich@buyside.com

Windermere REAL ESTATE Search Properties Chat Now Need an Agent?

Menu

f p t b @ y in

What is Your Home Worth?

Get instant market values for your home.

Enter address to get market report

RESULTS INCLUDE

- 1 HOME VALUE ESTIMATES
- 2 BUYER BREAKDOWN
- 3 RECENT NEARBY SALES

Introducing Your Seller Lead Tool: Percy

PERCY^{AI}

The ultimate home valuation tool to capture and nurture seller leads

- Percy's flagship Home Valuation Site (HVS) engages seller leads with proprietary market demand data that establishes you as market experts.
- Already included on your agent site to attract seller leads - prospects simply type in their address and they will get an instant report, branded to you.

Percy turns every one of our sites into 24/7 data portals, giving sellers exactly what they're looking for:
real-time market insights.

WHAT DO OWNERS WANT

According To A Zillow Survey And The Annual NAR Survey,
Two Things Owners Wanted From A Listing Agent:

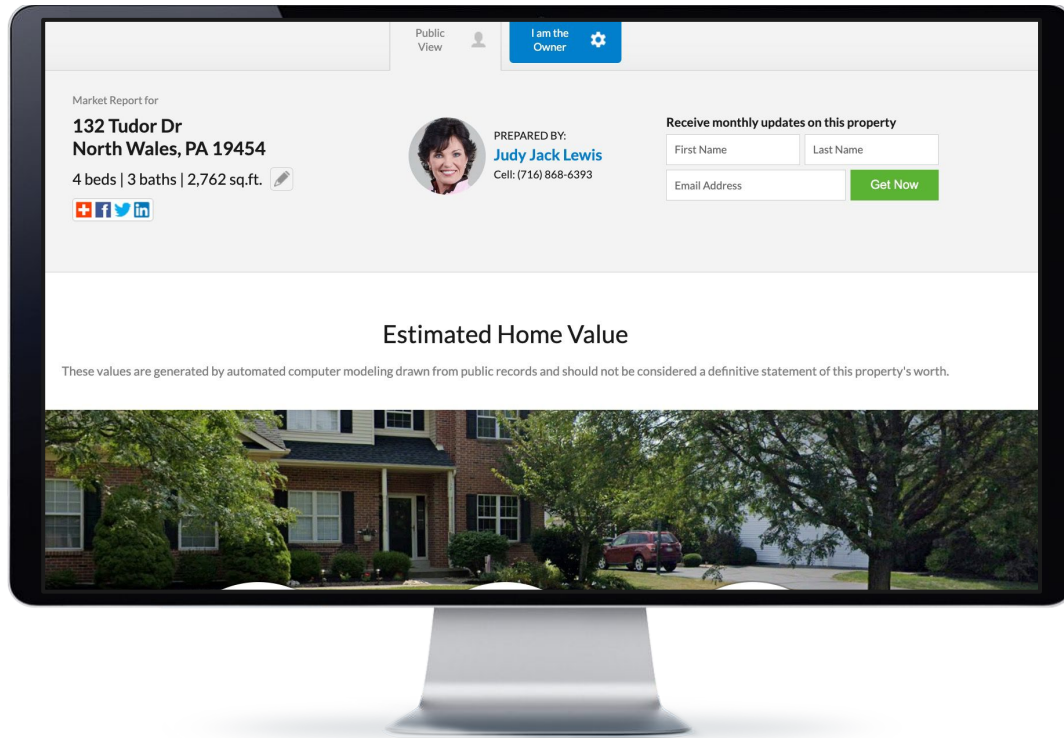
FIND INTERESTED BUYERS

89%

DETERMINE LIST PRICE

79%

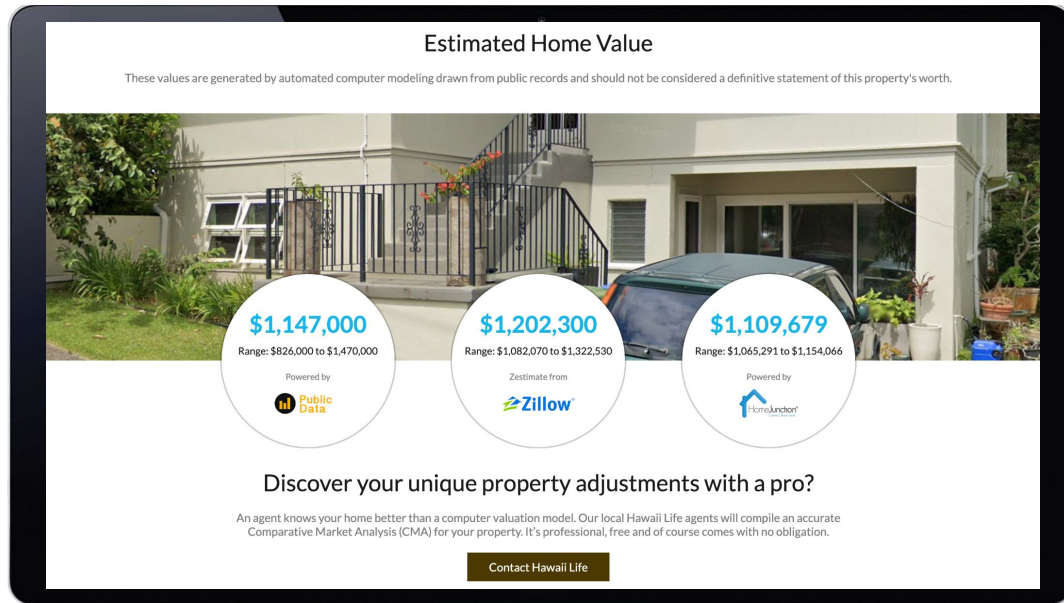
The Home Valuation Report



Top of the Report: Branded To You

- Information about the home, and options for the homeowner to claim their home.
- Your picture, name, and phone number immediately available for prospects to reach out to you.
- Call to action to receive a monthly report from you, so you can stay top of mind
- A 360 video view of their home and their neighborhood.

The Home Valuation Report

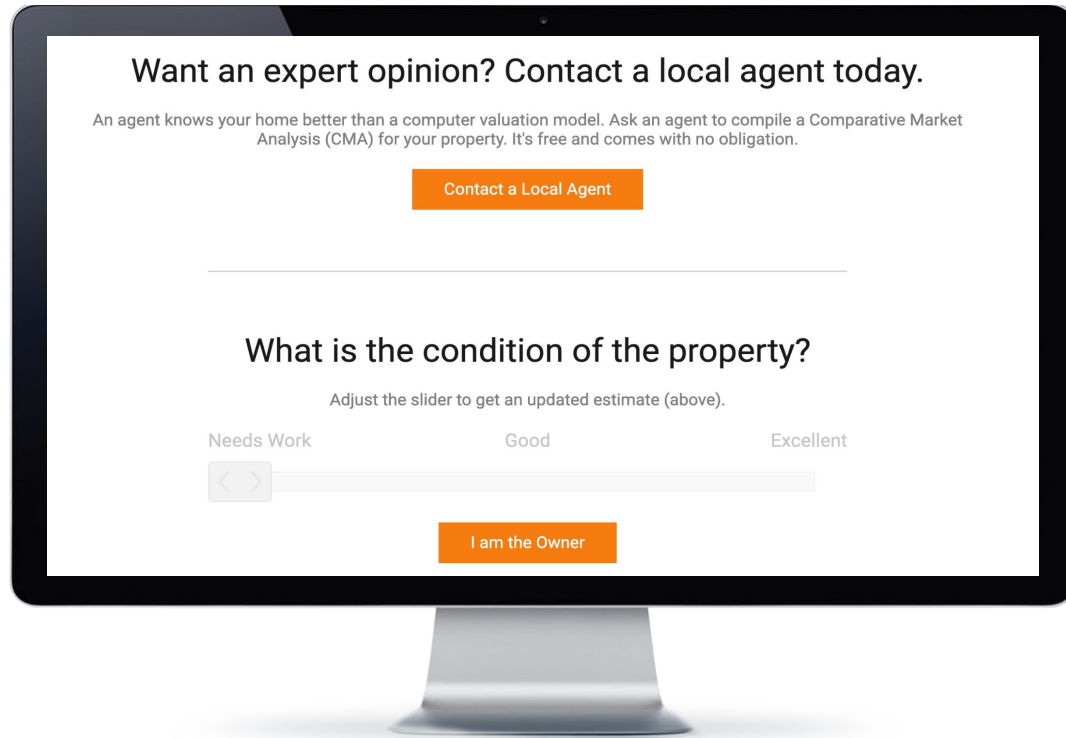


Multiple Valuations

- Leverage real-time public data, from sites like Zillow and public databases.
- Display the high degree of variation in pricing models
- Prompts the seller to contact an agent.

Presenting multiple valuations helps highlight the need for an agent due to the vast differences in computer pricing models.

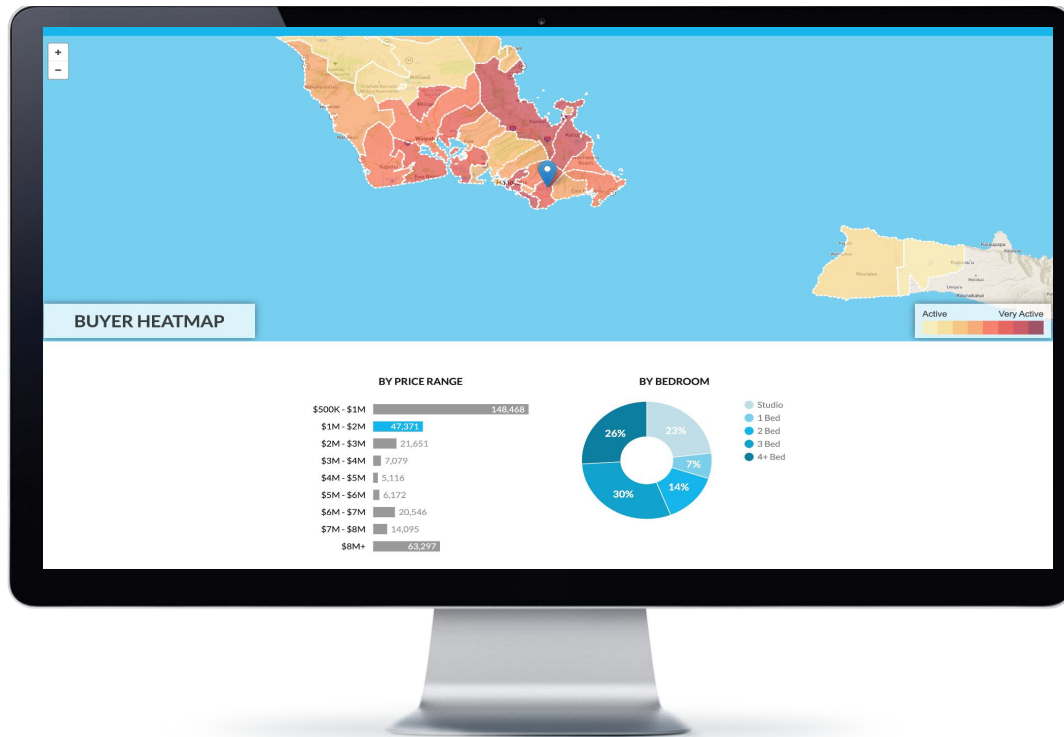
The Home Valuation Report



7+ Calls to Actions

- All designed (and tested) to maximize homeowners leaving behind contact information
- Homeowners can subscribe to monthly reports, claim their home, and/or request to speak with you

The Home Valuation Report



Buyer Demand:

- Analyzes all online inquiries from the last 90 days in the immediate and surrounding areas.
- The darker the heatmap, the higher the number of inquiries.
- Analysis of what buyers are looking for is broken down by:
 - Price Range
 - Bedroom Count

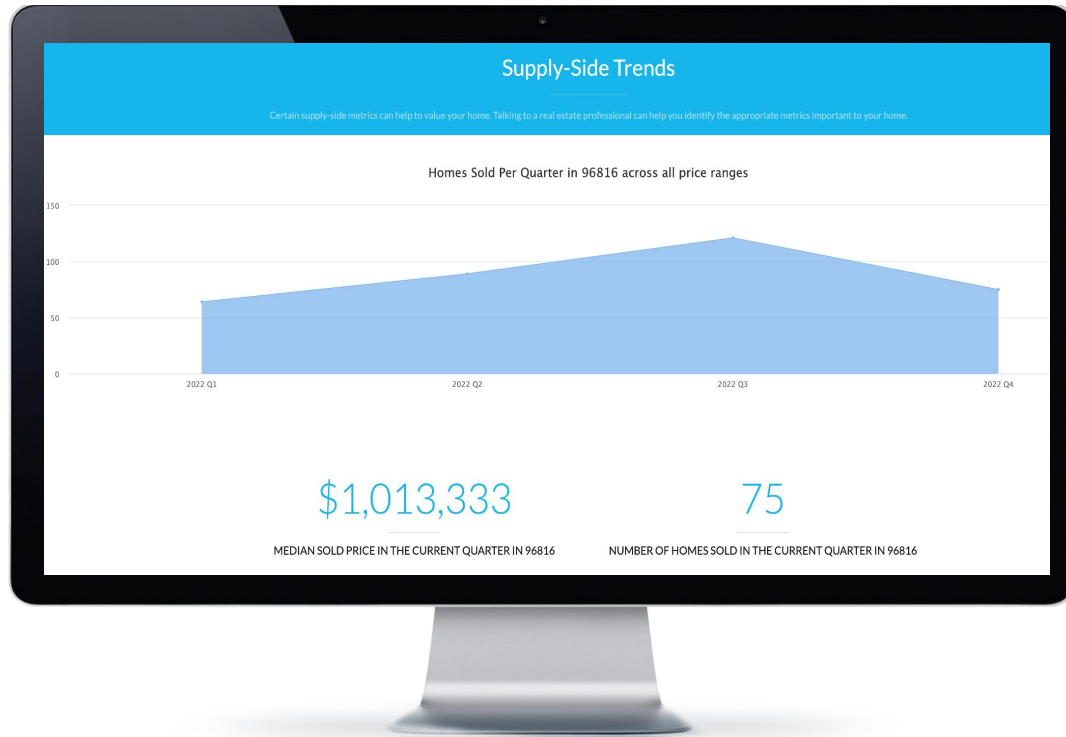
The Home Valuation Report



Buyer Funnel

- Analyzes all online Buyer activity in the last 90 days
- The Buyer Funnel displays the data by total online activities within:
 - The state
 - A 5 mile radius
 - A 5 mile radius + within price range
 - A 5 mile radius + within price range + with a bedroom match

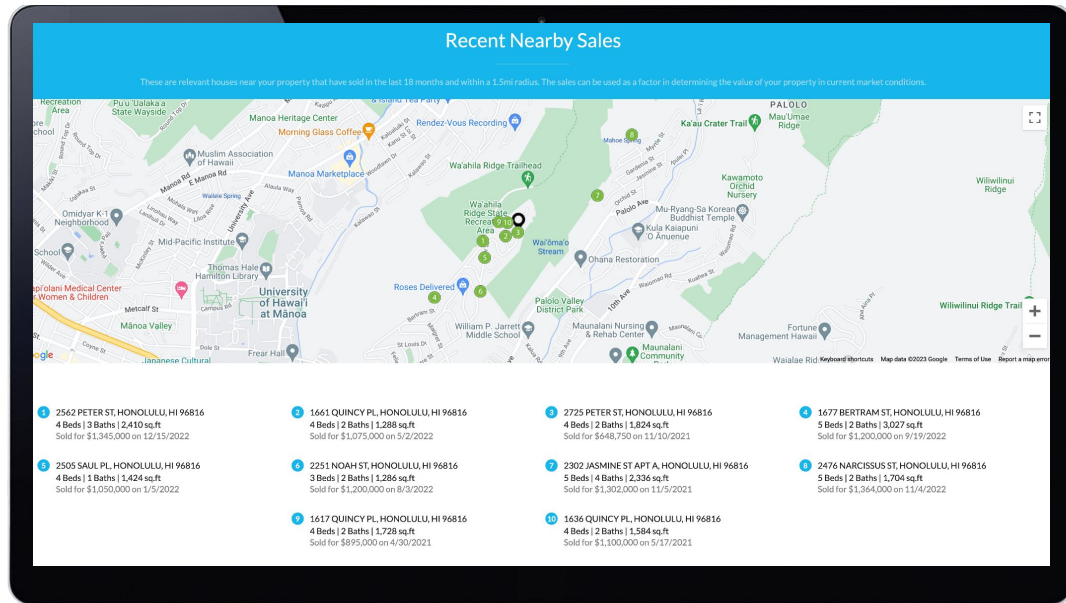
The Home Valuation Report



Nearby Activity: Supply Side Trends

- Shows macro trends for the number of homes sold in their zip code, across all price ranges.
- Displays a median for the past 90 days – price and # of home sold.

The Home Valuation Report



Nearby Activity: Recent Sales

- Shows relevant homes near the homeowners property that sold in the last 18 months and within a 1.5 mile radius.
- Shows a total of 10 homes to showcase the variety of price points

REMEMBER THIS? WHAT DO **OWNERS WANT**

According To A Zillow Survey And The NAR Survey,
Two Things Owners Wanted From Their Listing Agent:

FIND INTERESTED BUYERS


89%

DETERMINE LIST PRICE

79%



Why Is A Home Valuation Tool Valuable To You?



Agents who use Percy's Home Valuation Site, on average, receive **15x more leads and 25% more listings** compared to those who don't use it!

- **A great *magnet* to attract seller leads**
- **Provides a more subtle way for you to gauge interest**
 - EX: A lot easier to provide this service to your network than *directly* ask if they want to list with you.
- **Past behavior *predicts* future behavior**
 - If someone puts in their home valuation, they are more likely to list with you than someone who does not.
- **Great value-add to your local community**
 - Help your clients navigate the uncertainty in the market and keep track of their equity, over time.

Training Agenda

Converting Leads to Listings

- ~~Overview of Percy~~
- Seller Leads: An Amazing Website
- How To: Get Seller Leads
- I Have A Lead, Now What?
- Summary + Next Steps



Seller Leads: An Amazing Website

Engaging Sellers



YOUR GEOGRAPHIC SPHERE:

Those homeowners in the location you farm. Most of these Homeowners still need to be introduced to you & your brand.

WHAT TO DO:

[Send out direct mailers the week of April 3-7 with a QR code](#) that directs them to your own What's My Home Worth Page.

[Ad Retargeting.](#) Redirect any purchased local ads for homeowners to check their home's value on your Home Valuation Page.

YOUR SOCIAL SPHERE:

These are your 1st & 2nd degree contacts engaged with your social media profiles.

WHAT TO DO:

[Post content about the market & housing price changes](#) directing them to check the value of their own home. Include your home valuation site in your newsletter and/or emails that you send to your network.

CLIENTS:

These are the people you've already worked with in the past. It's a great opportunity to update them on their home's value & buyer demand.

WHAT TO DO DURING #NHVW2023:

1. [Subscribe each of these contacts to a monthly Home Value Report](#) coming from you each month. That way as we go into the hot season, they've already been getting a report from you on their home's value increasing month over month.
2. [Create a Buyer Market Analysis report for the homeowner's you've worked with in the past.](#) This is a great way to start a conversation about how the market is this new year, the new home values, buyer demand, and see what their plans are.

Engaging Sellers

YOUR GEOGRAPHIC SPHERE:

Those homeowners in the location you farm. Most of these Homeowners still need to be introduced to you & your brand.

WHAT TO DO:

[Send out direct mailers the week of April 3-7 with a QR code](#) that directs them to your own What's My Home Worth Page.

[Update Email Signature.](#) Be creative!

[Purchase Ads.](#) Target by Zip Code for your farm

[Have an amazing website.](#) Use our widget or make sure that Percy is *front and center*



Seller Leads: An Amazing Website

RT REALTRENDS Join HW+ Login

2022 Best Seller Page

Seller pages are designed to provide resources and tools for the potential seller. This includes home value reports, getting your home ready, marketing your home and negotiating and closing the deal.

* RealTrends has partnered with Percy to present the Best Seller Page in our special sponsored category. The grading criteria for this category has been designed independent of RealTrends.

Sponsored By:

PERCY^{AI}

BHHS Florida Network Realty

BHHS Florida Properties Group

BHHS Fox & Roach

- Conversation rates drop if the consumer has to click multiple times
- Percy is the ultimate *converter*; make it super easy for homeowners to get a home valuation
- Recommendation is to embed the widget on your homepage or make it one click to get to the valuation site.

ANY QUESTIONS?

Training Agenda

Converting Leads to Listings

- ~~Overview of Percy~~
- ~~Seller Leads: An Amazing Website~~
- **How To: Get Seller Leads**
- I Have A Lead, Now What?
- Summary + Next Steps

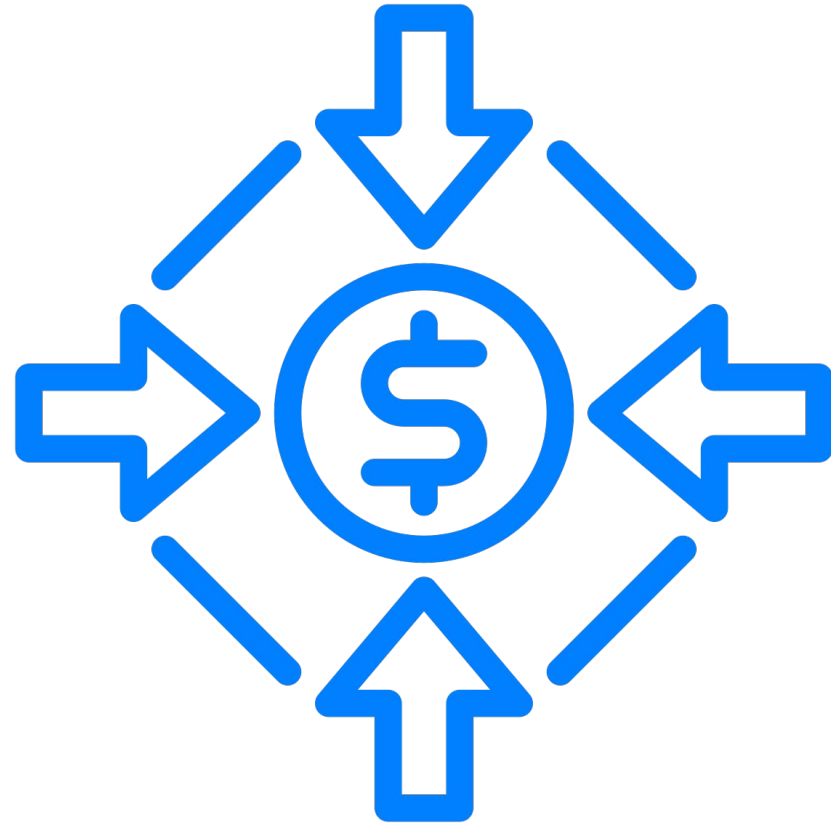


So ...

**How Do You Get People To Put In
Their Address?**

Make Home Valuation the CORE

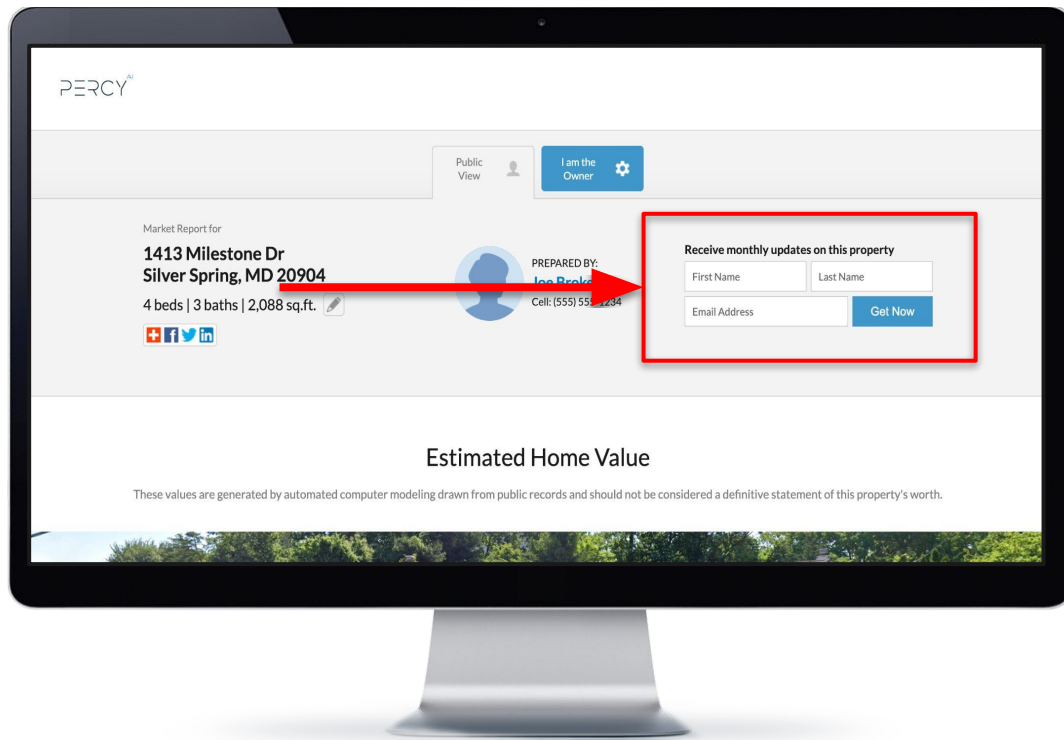
It should be leveraged in almost all of your conversations with your network





So don't leave a business card, enroll them in a monthly report to put you in the center of their understanding of the market

How Do People Sign Up For the Monthly Report?



- **How do people subscribe?**

Type in an address on your Percy Home Valuation site

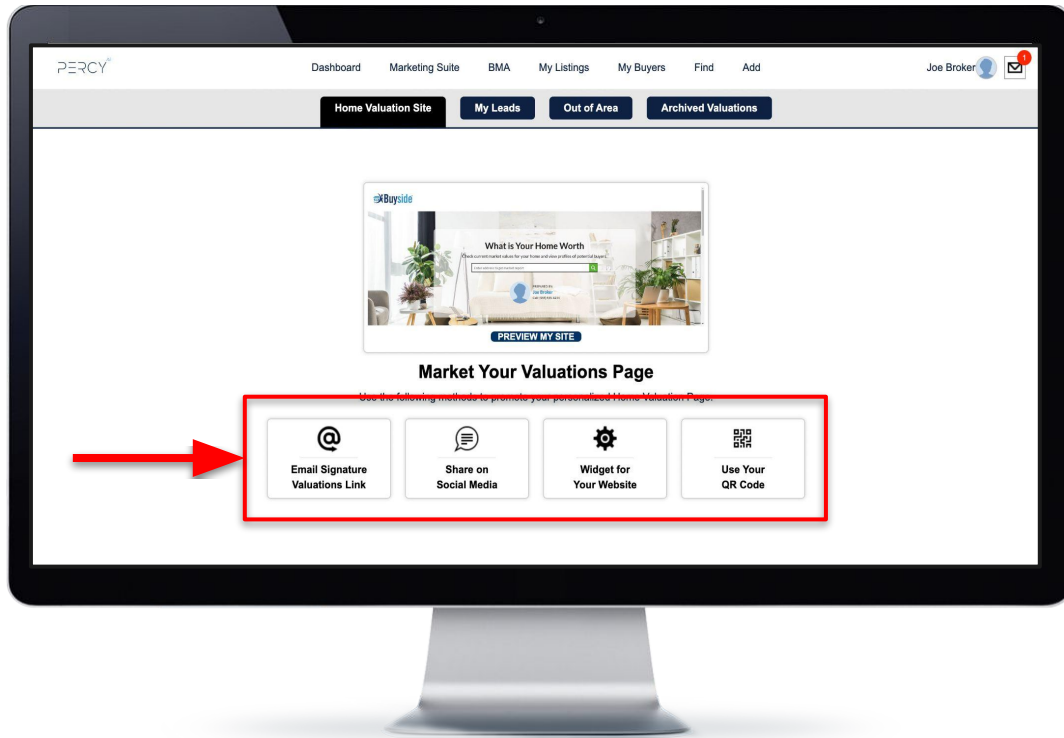
On the Report, there is an option to receive a monthly update.

You can also sign people up on their behalf! (soccer example)

- **Who subscribes themselves?**

Anyone who leaves their contact info.

Other Strategies to Get Seller Leads



Ways To Promote Your Home Valuation Site:

- Update your email signature
- Post regularly on social media
- Leverage your site on Nextdoor
- Local advertising with the QR code
- Leverage postcards & 'Just Sold' notices with your contact information
- Strategic email marketing

Your goal is to *qualify the lead.*

**Walk their home and establish a
relationship**

The Christopher Callahan: Letter + QR Codes

BERKSHIRE HATHAWAY HOMESERVICES | NEW ENGLAND PROPERTIES



Hi [HOMEOWNER NAME HERE],

I hope that you and yours are doing well so far in 2023! Spring and sunshine *finally* arriving also brings good news for the housing market: listings are on the rise!

But what does that mean for *you*?

The value of your home may also be on the rise. The changing market has produced an increase in online buyer activity in our area, meaning searches in *any* database have increased. Simply put: The housing market is heating up, just like the temperatures!

Did you know? Over the last 90 days alone, there were over 2 million online searches for homes in central Connecticut – specifically in the 06010 zip code – just within the price range of 100-500 thousand? Look at the full breakdown:



Use the QR code below (or above) to find more insights about the market, multiple estimates on the value of your property, and more! To do so, just open the Photo app on your phone, hover the camera over the QR code, then visit the website when the prompt appears.

Have any questions? Feel free to reach out! I am always happy to help.

Your trusted central CT agent,

[DELETE THIS AND ADD HANDWRITTEN SIGNATURE HERE]

Christopher Callahan, REALTOR®
BerkshireHathaway HomeServices, New England Properties
Agent License #RES.0793304
Phone: 860-877-4451
Email: chriscallahan@bhhsne.com
Website: <https://christophercallahan.bhhsneproperties.com/>



Top Agent in the Boston Metro area

1. Farm a specific area by Zip code
2. Find a random address in that area to get the **By Bedroom** and **By Price Range** data points
3. Screenshot that part of the report
4. Personalize the report for the homeowners
5. If any of them scan the QR code and enter in their address, you'll be notified
6. Find contact information using a site like Spokeo.com and reach out to review the report with them in person.

The Heather Anderson: Letter + QR Codes

REAL ESTATE

JUST SOLD

123 ANYWHERE ST
\$550,000

NH 2023
Powered by Percy

Hello!

It is currently National Home Valuation Week, which is a time when homeowners check in on their overall investment.

I have a free tool that you can use to immediately get three valuations for your home, along with buyer demand and recent activity. Fully complimentary, as I work with a lot of neighbors in this area. Simply scan the QR code and immediately get your valuation.

Let me know if you have any questions!

Brandon Carroll
540-200-9508
brandon@percy.ai

Current Resident
696 Ocean Parkway
Ocean Pines, MD 21811

Top Agent in Atlanta Area

1. Farm a specific area by Zip code
2. Make a flyer and postcard and send it with your QR code
3. Two touchpoints, one week apart.
4. If any of them scan the QR code and enter in their address, you'll be notified
5. Find contact information using a site like Spokeo.com and reach out to review the report with them in person.

10 Sample Social Posts

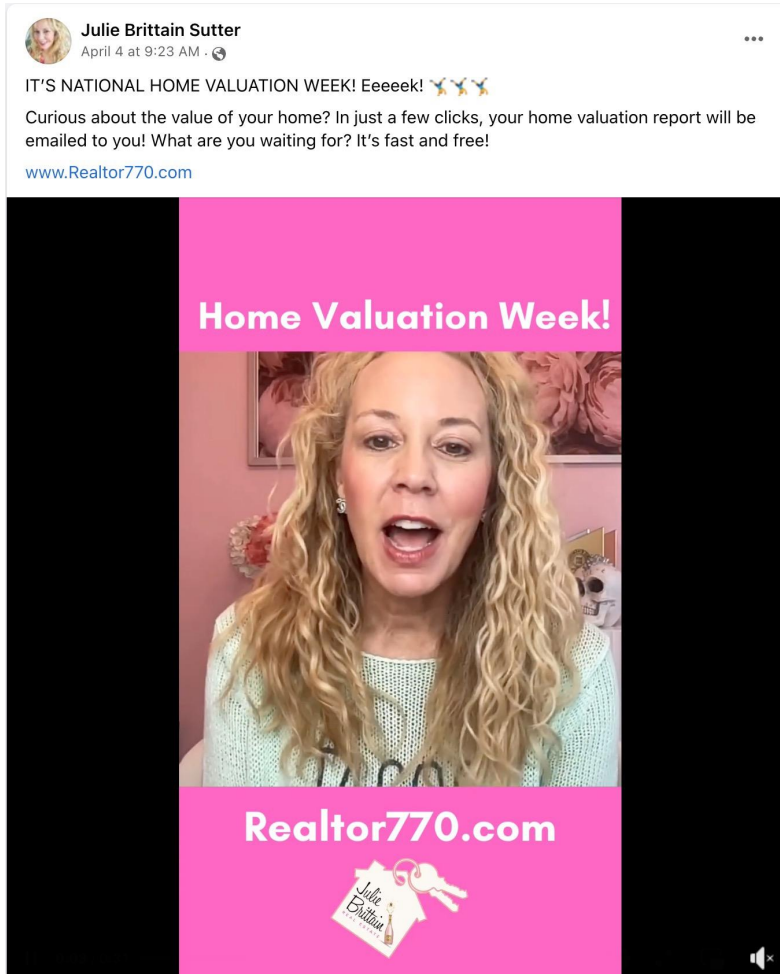


1. The market is changing. A lot of my clients are worried about their home value. My brokerage just brought in a service to help the local community, where we can offer 3 different valuations for you to get a better idea.
2. Would you like to know what your home is worth? Click below for an instant valuation.
3. Click here for instant access to a valuation of your home!
4. I am proud to introduce a complimentary home valuation tool. Please feel free to share with your friends.
5. Thinking of selling your home? Just curious what it's worth? Find out instantly here.
6. Want to know what your home's worth? Get 3 free valuations INSTANTLY!
7. Your house may be worth more than you think! How do I know? Check out this free valuation on YOUR home! Click here!"
8. Thinking of selling? I have buyer looking in #neighborhood
9. Selling your home? Simply click the link below, enter your home address and discover the current buyer demand for your home.
10. I would like to share my new home valuation site with you. Can you take a moment to try it out? I would love your feedback

Best Time To Post for the Core 5 Networks

- **Facebook:** Monday, Thursday & Friday at 9AM, 1PM, or 3PM
- **Twitter:** Monday & Wednesday at 12PM, 3PM, or 5-6PM
- **LinkedIn:** Tuesday, Wednesday, & Thursday at 7-8AM, 12PM, or 5-6PM
- **Instagram:** Monday & Thursday at 8-9AM or 5PM
- **Nextdoor:** Monday, Wednesday, and Friday at 7-8am or 5-6pm

Leveraging Video



Why?

- Video content on social media generated 12x more shares than **text & image content combined**
- Agents who used video saw more valuation leads than those who did not use video

Updated Bios / Links



@CindyThomas



Cindy Thomas John L Scott Business Page

REVIEWS

Get A Home Valuation

Connect With Me on Facebook

Connect With Me on Instagram

Where?

- Instagram URL / Bio
- Facebook Website on Business Page
- Nextdoor URL and Bio
- LinkedIn Website
- Twitter Bio and URL
- Consider using LinkTree or a similar tool to provide one link to many resources that you offer, including the home valuation!

How To: Get Seller Leads

Quick Demo!

The Marketing Suite

Promoting Your Home Valuation Site

Any questions?

Training Agenda

Converting Leads to Listings

- ~~Overview of Percy~~
- ~~Seller Leads: An Amazing Website~~
- ~~How To: Get Seller Leads~~
- **I Have A Lead, Now What?**
- Summary + Next Steps

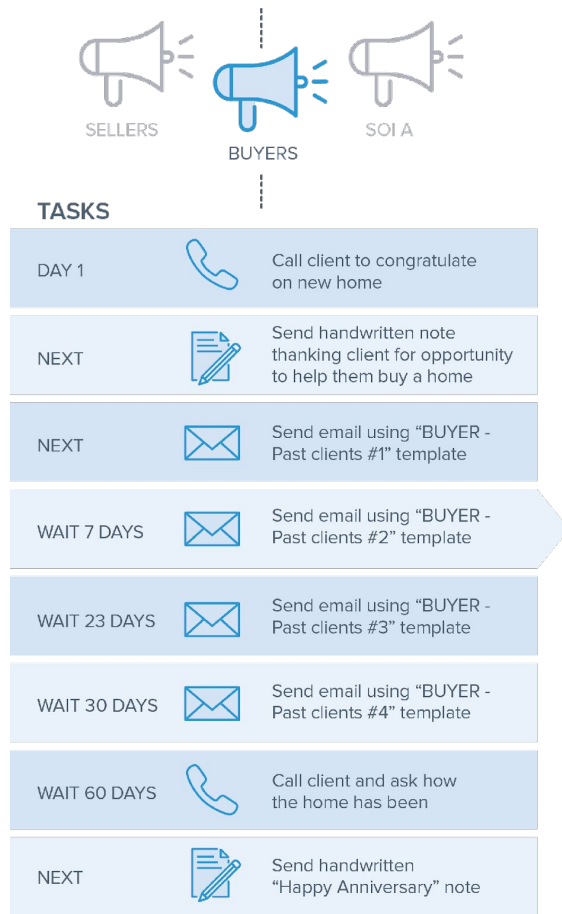


Important Stats

Remember: Your Goal Is to Qualify the lead (Short Term vs. Long Term vs. Not Interested)

- If someone is checking the value of their home, on average, they start the selling or buying process **within 35 to 40 days**
- The average conversion rate from listing opportunity to commission dollar **is 9%**. This is around 3x the average conversion rate from Zillow
- Speed to lead matters; **if you engage with a lead within 24 hours, you DOUBLE your likelihood of having a conversation with that lead**
- One follow up leads to a **48% likelihood of connection**
- 7 follow ups within 42 days (1x/wk) leads to a 96% likelihood of connection
- Agents who use Percy's Home Valuation Site, on average, receive 15x more leads and 25% more listings compared to those who don't use it.

Who is Best Person To Work With Here?



- Scripts to include 7+ touchpoints
 - Emails, SMS, Phone Calls
- Valuation Only vs. Contact Data Lead
 - Spokeo

Two Types of Leads

Valuation Only vs. Contact Data Leads

1. Valuation Only

- Consumers enter their address in to view a report
- Percy pulls their public record and provides agents with the name of the homeowner
- Homeowner does not claim their home, subscribe to a monthly report, or verify ownership of the home by clicking on one of the 7+ calls to actions

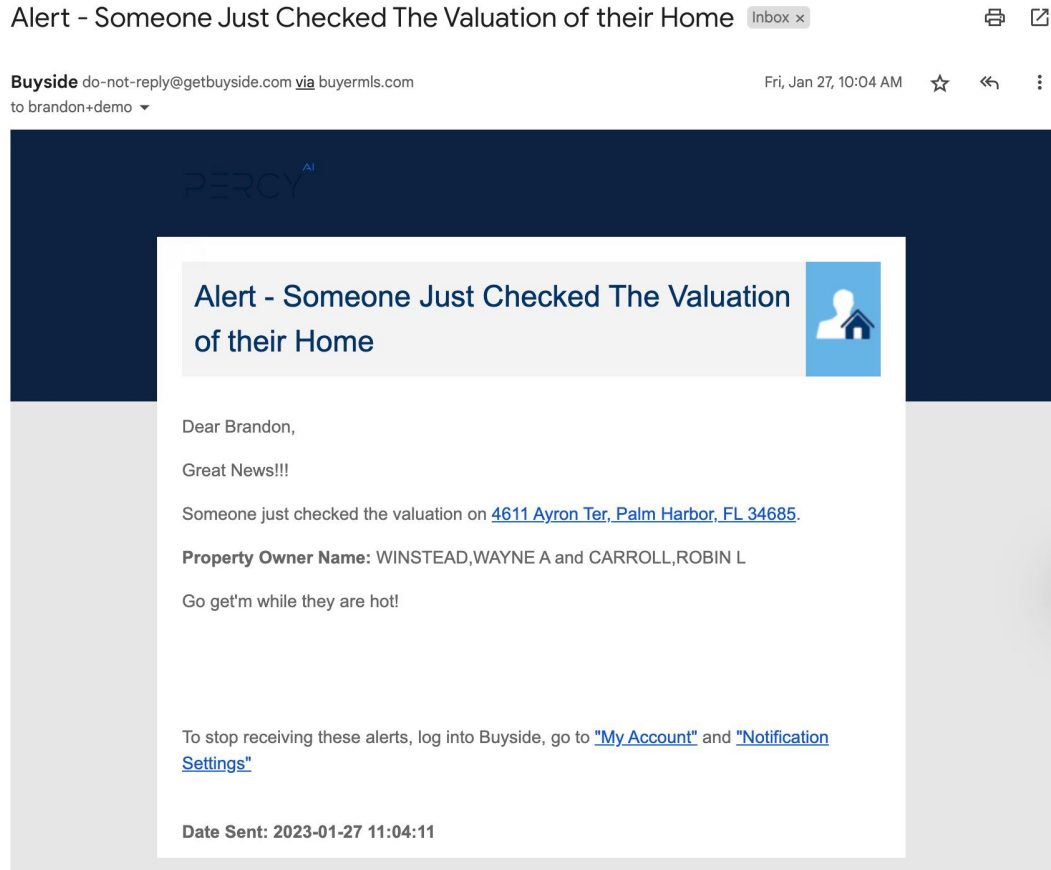
2. Contact Data Lead

- Consumers enter their address in to view a report
- Homeowner claims their home, subscribes to a monthly report, or verifies ownership of the home by clicking on one of the 7+ calls to actions

What do you say to leads?

- What did you think of the valuation?
- What makes you think it's worth more?
- Have you done some work on it recently?
- What caused you to inquire?
- Are you looking to list; are you looking to move soon because of a life event? Or do you need to tap into equity for a certain reason? Or do you just want to feel good about your investment in this uncertain market/times we are in?

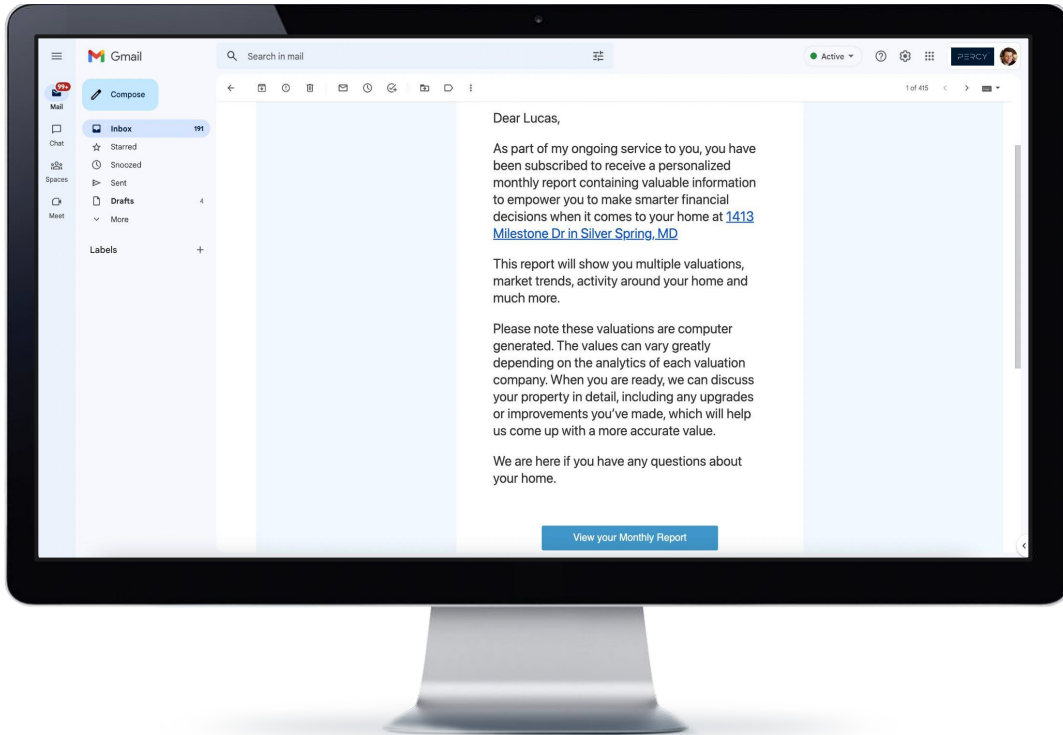
Valuation Only



Homeowner *only* put in their contact information

- Percy finds the homeowner's information and sends you email.
- This lead **does not** transfer over to your CRM
- **Strategies:**
 - Send a postcard to the lead
 - Try finding the owner's contact information and give them a call or email.

Strategy: Get more Contact Data Leads



- **Sign up for a monthly report**

- Your Past Clients
- Your Seller Leads
- Your Buyers (*most have a home*)

- **Pro Tip:**

You can also leverage the Monthly Report as a Marketing touchpoint for clients in your database.

**** Monthly Report Subscribers will receive an email with a personalized message from you + a link to their report (above).**

Training Agenda

Converting Leads to Listings

- ~~Overview of Percy~~
- ~~Seller Leads: An Amazing Website~~
- ~~How To: Get Seller Leads~~
- ~~I Have A Lead, Now What?~~
- **Summary + Next Steps**



Summary + Next Steps

Summary:

- Percy is the ultimate home valuation tool to capture and nurture seller leads
- Best ways to drive listing leads: 1) have an amazing website, 2) update your email signature, 3) post on social and update your bios, 4) print marketing, and 5) local advertising.
- Follow up is *absolutely* essential for you to convert listing opportunities.
- Leads are either 'Valuation Only' or 'Contact Data' leads; have processes built for both types of leads



Summary + Next Steps

Next Steps:

- Test out your home valuation site! Type in your own address and subscribe to a monthly report,
- Enroll past clients to receive a report
- Create a social calendar to regularly post on social media
- Include the home valuation in your print prospecting efforts



PERCY^{AI}

WE VALUE YOUR PARTNERSHIP.