

National Home Valuation Week 2023

How to 2x Your Leads



Presented by:

Brandon Carroll

Vice President, Client Success

brandon@percy.ai

Welcome!

Brandon's Background



A Little About Me:

- Live in the DC/MD area
- Owner of 2 doggos and a cat!
- Coffee, wine, and live music are what we enjoy the most
- **Passionate** about helping our Percy clients get the most value out of their account!

Agenda

How to 2x Your Leads on NHVW

- **The Home Valuation Mindset**
- Geographic Sphere
- Social Sphere
- Clients
- Summary / Preview of Next Webinar

**NH
VW** 2023
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The Home Valuation Mindset

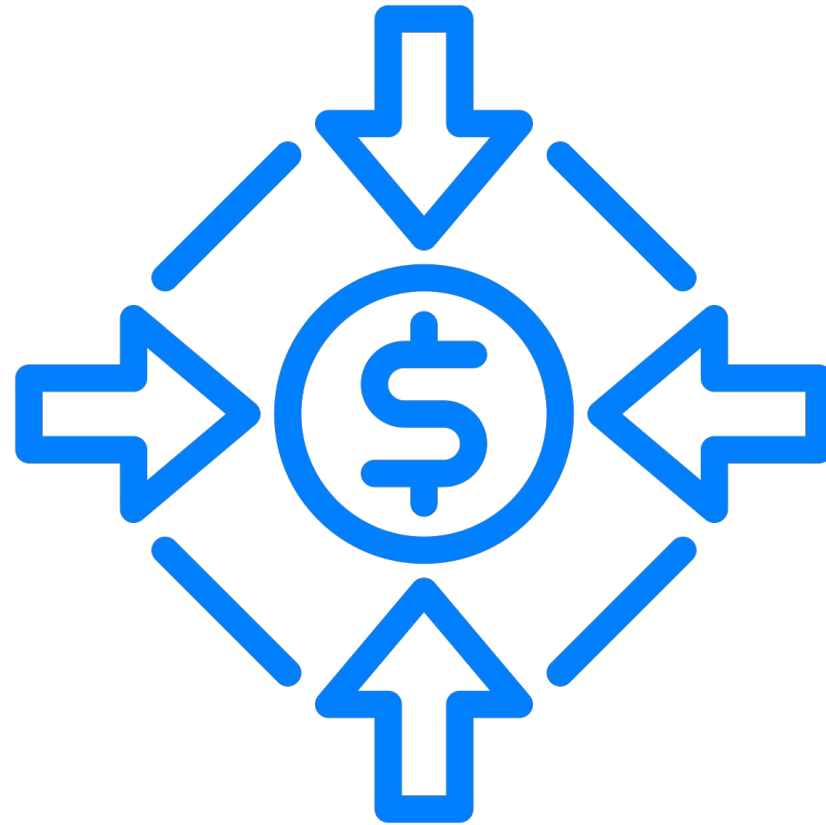


Soccer Game Example

- Give them a taste of what it will be to work with you
- Don't leave a business card, enroll them in a monthly report to put you in the center of their understanding of the market
- Write a script you can use

Make Home Valuation the CORE

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



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.

Consistency Is Key

#NHVW2023



- Create a plan and execute it
- Be consistent with your actions
- Drive urgency (as it is only one week) with your network.

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Two Types of Leads

Valuation Only vs. Contact Data Leads

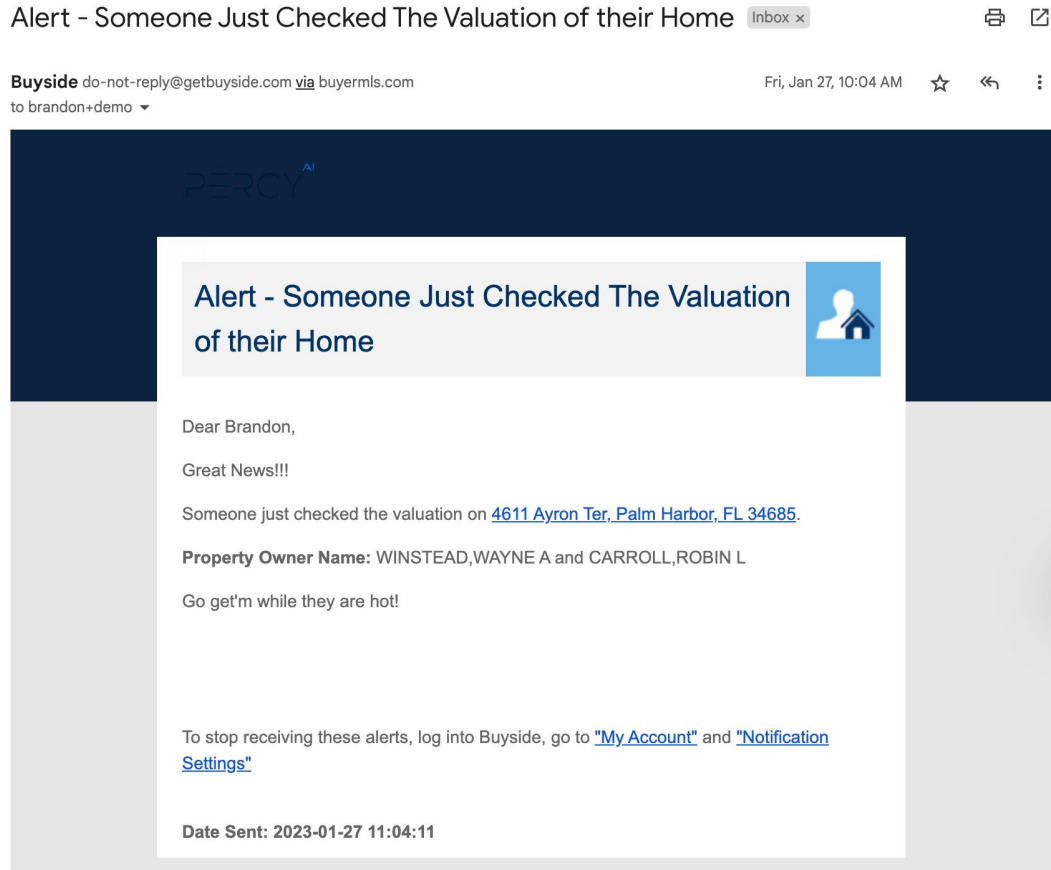
1. Valuation Only

- 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

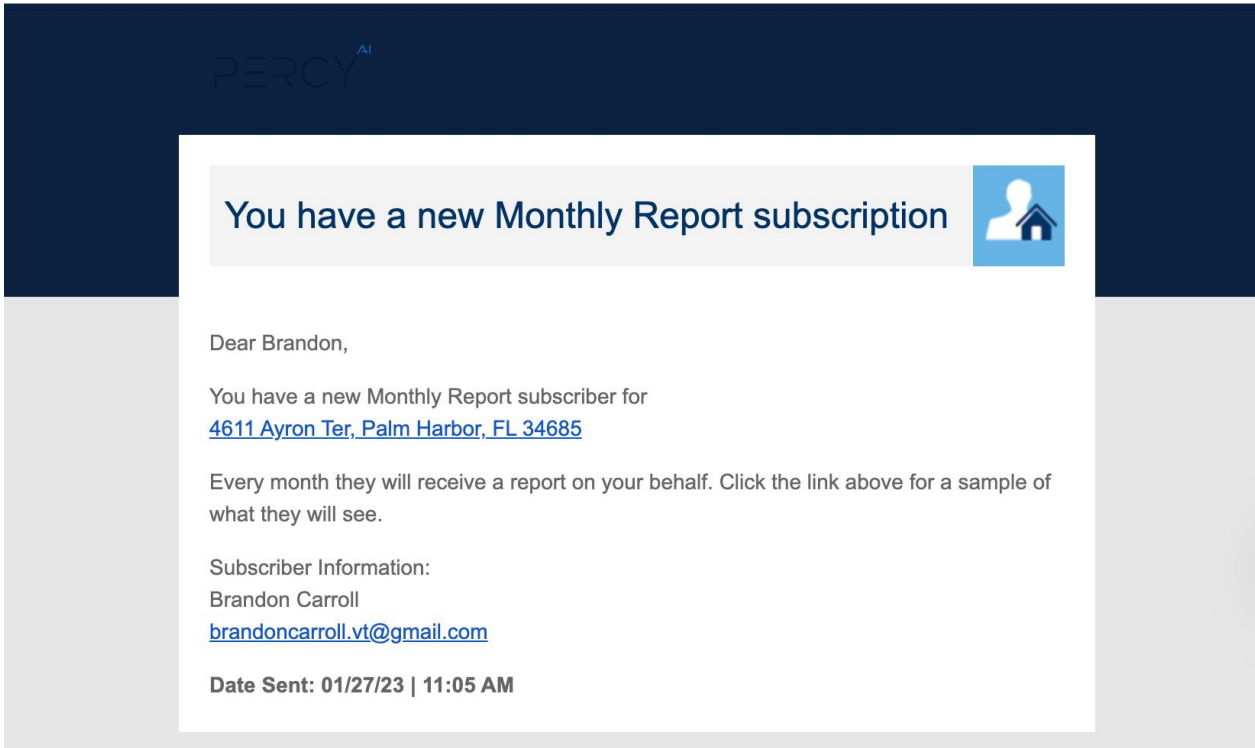
Valuation Only



Homeowner *only* put in their contact information

- Percy finds the homeowner's information and sends you email.
- **Strategies:**
 - Send a postcard to the lead
 - Try finding the owner's contact information and give them a call or email.

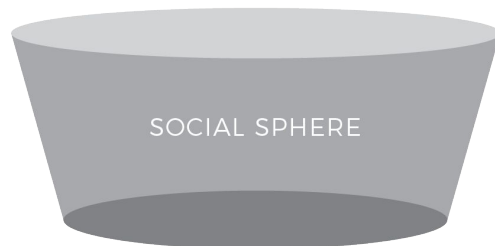
Contact Data Lead



Homeowner claims their home, signs up for a monthly report, or requests to speak to an agent.

- Percy finds the homeowner's information and sends you email.
- **Strategies:**
 - Engage with them via email, phone, and text
 - Goal is to qualify their interest in listing a home

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.

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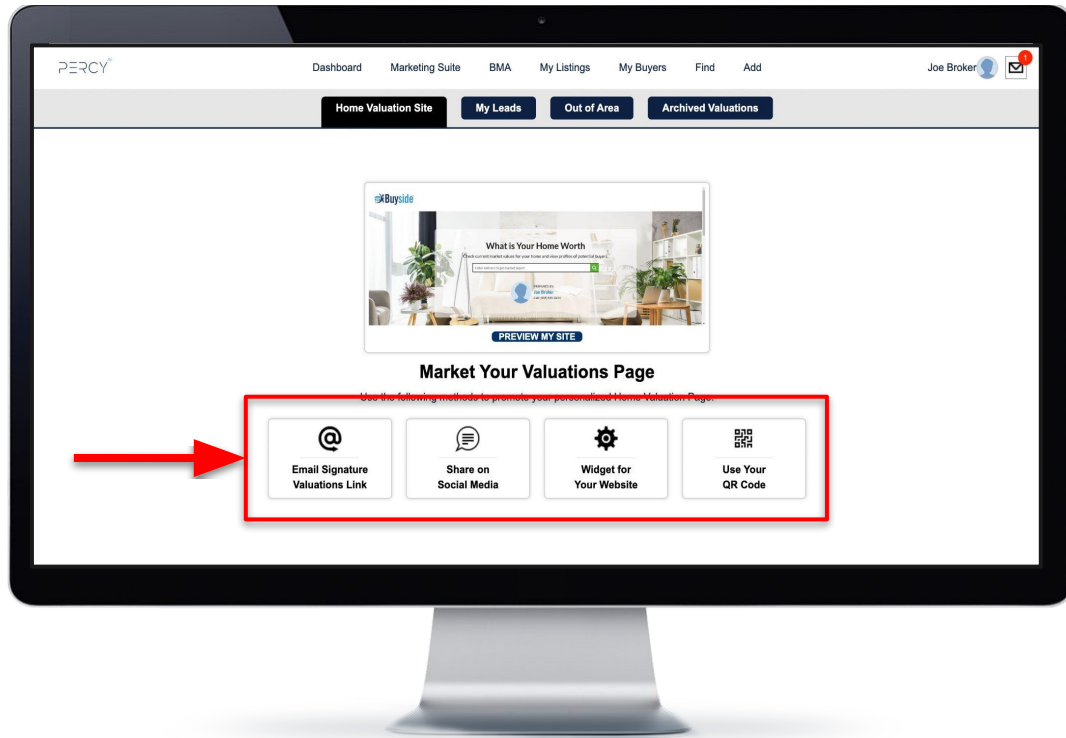
[Update Email Signature.](#) Focus on NHVW!

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

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



Update your email signature

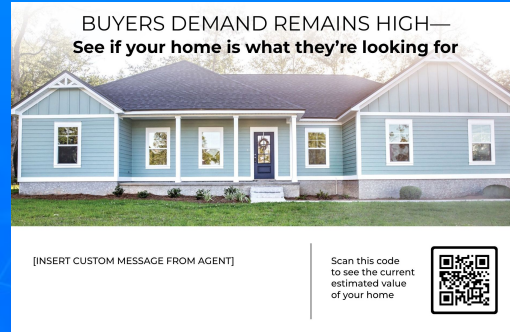
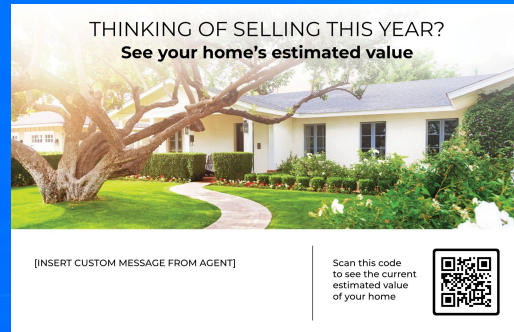


Email Signature

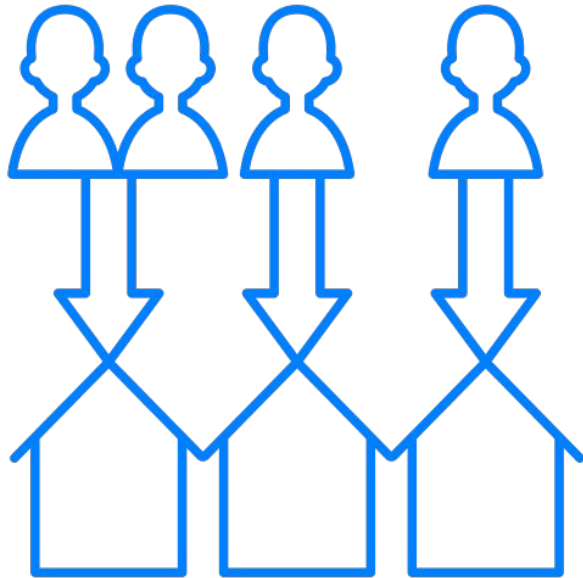
- Use the Marketing Suite to update your email signature
- Example email signatures:
 - What's Your Home Worth? Get three automated Estimates - Instantly. No cost, and no obligation.
 - It's National Home Valuation Week! Wondering what's your home is worth? Find out now.

Materials: Agent to Client

✓ Geographic Sphere: 3 simple flyers



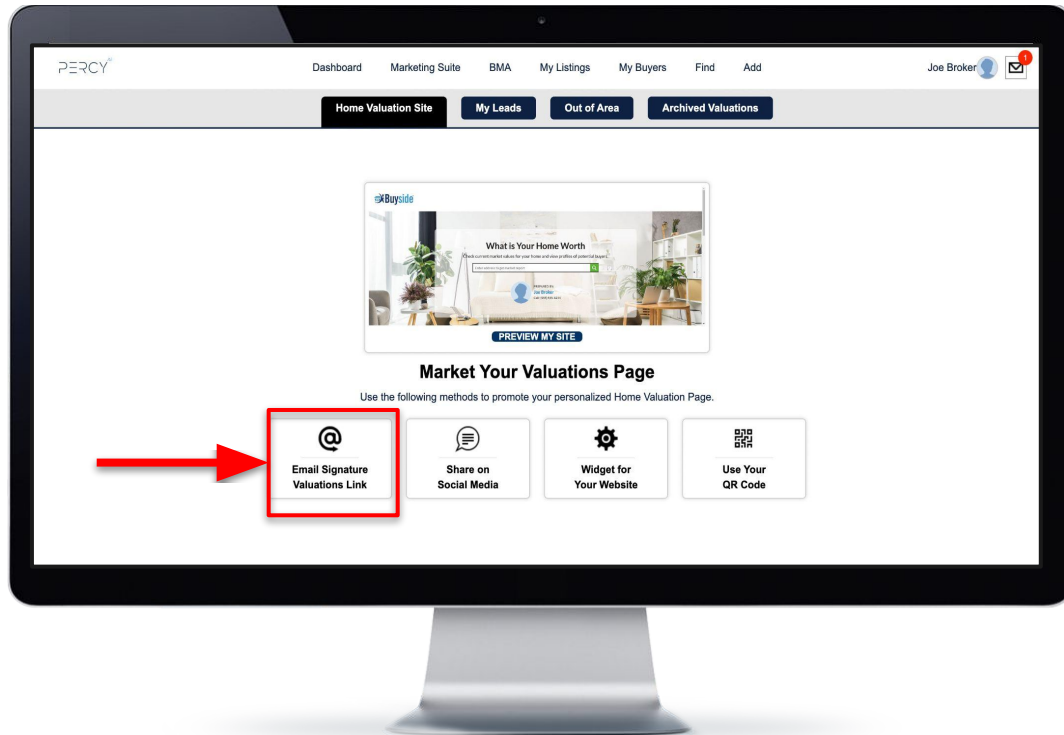
Geographic Sphere: Who To Target



People To Target

- Valuation Only Attempts
- Farmed areas by Zip code
- Cold Prospects from Zillow or that you purchased; stale leads from your database
- Neighbors of listings you recently sold (past year)

Geographic Sphere: How To Execute

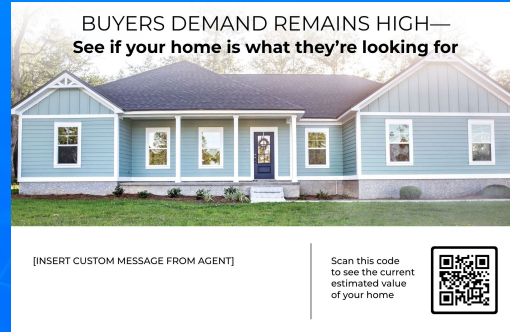
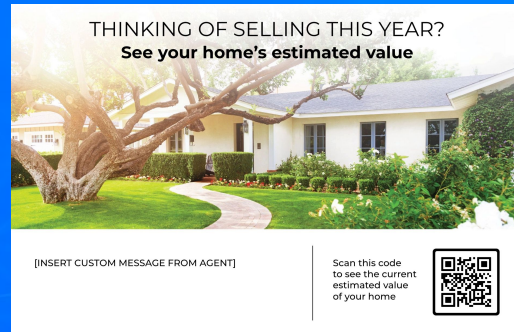


Strategies & Tactics

- Direct mail, door knocking, postcards, newsletters, email, or any other form of targeted advertising.
- Just sold postcards with a QR Code
- Newsletter with a direct link to your home valuation
- Social advertising, targeted by Zipcode
 - Facebook, Nextdoor, Instagram
- Local advertising in the newspaper

Materials: Agent to Client

✓ Geographic Sphere: 3 simple flyers



Geographic Sphere: Valuation Only Attempt



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Hello!

I am reaching out to let you know that on (date/time) someone ran a valuation on your property from our website. In fact, there were multiple valuations requested about your property!

It is currently National Home Valuation Week, which is a time when homeowners check in on their overall investment and get a better idea of the buyer demand in the area.

Happy to help in any way!

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

Current Resident

696 Ocean Parkway

Ocean Pines, MD 21811

Group: Valuation Only Attempts

- These people came through your lead center and did not leave behind contact information
- First touchpoint is a mailer to re-engage.

Geographic Sphere: Valuation Only Attempt



Spokeo. Know More.

NAME EMAIL PHONE ADDRESS

Enter a Name, Phone Number, Address or Email

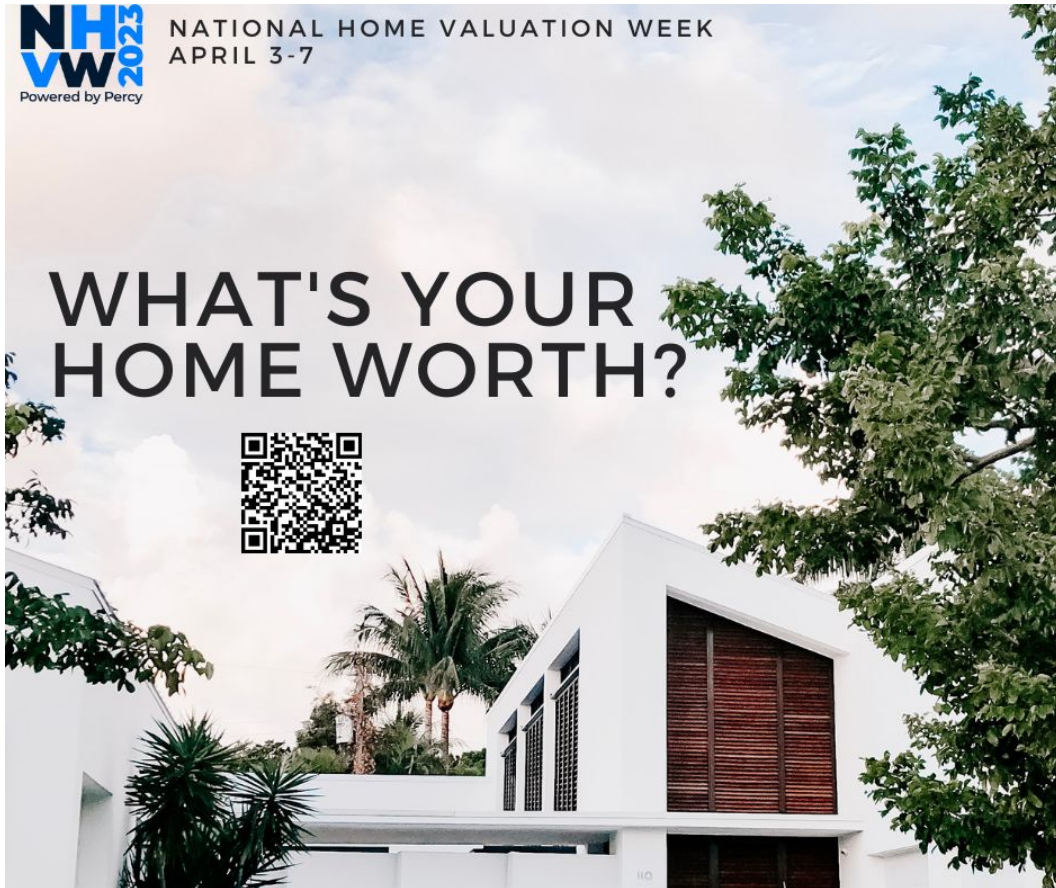
SEARCH NOW

Search by name, phone, address, or email to confidentially lookup information about people you know such as yourself, friends, family, acquaintances, and old classmates.

Group: Valuation Only Attempts

- These people came through your lead center and did not leave behind contact information
- Second touchpoint is finding contact information and reaching out to them
- State who you are, that it is national home valuation week, and act as a *resource* for the homeowner

Geographic Sphere: Farmed Areas by Zipcode



Group: Farmed Areas by Zipcode

- These people are homeowners who exist in an area you are farming
- First touchpoint is a mailer with your QR Code

Geographic Sphere: Farmed Areas by Zipcode



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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

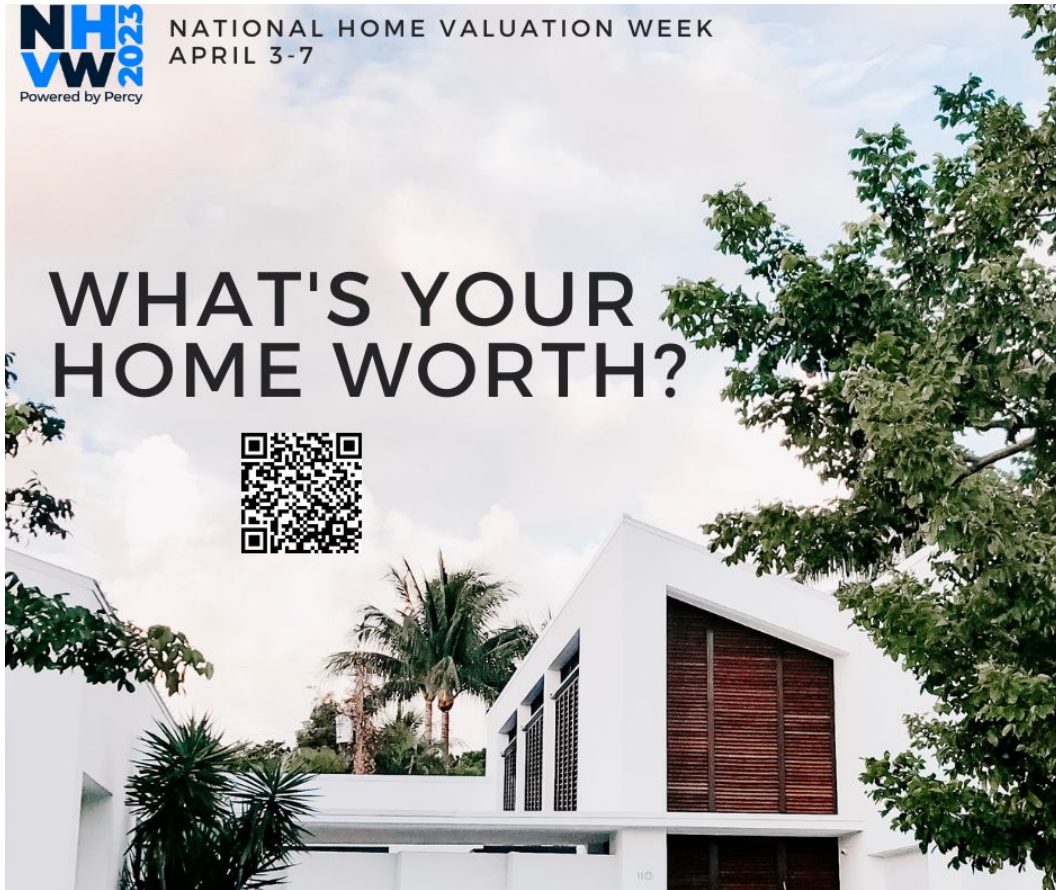
Ocean Pines, MD 21811



Group: Farmed Areas by Zipcode

- These people are homeowners who exist in an area you are farming
- Second touchpoint is a postcard
- Tip: Handwritten is better than digital!

Geographic Sphere: Cold Prospects



Group: Cold Prospects

- These people are homeowners in your database that are cold
 - Stale zillow leads
 - Cold Open House Prospects
 - ...etc
- First touchpoint is a mailer with your QR Code

Geographic Sphere: Cold Prospects

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Hello!

We talked quite a while ago. Not sure if you are already working with an agent or not.

I wanted to reach out, as it is currently National Home Valuation Week, which is a time when homeowners check in on their overall investment.


I have a tool that will help you understand the current value of your home. Fully complimentary, as I work with a lot of neighbors in this area. Simply scan the QR code and immediately get your valuation.

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

Current Resident

696 Ocean Parkway

Ocean Pines, MD 21811



Group: Farmed Areas by Zipcode

- These people are homeowners in your database that are cold
 - Stale zillow leads
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 - ...etc
- Tip: Handwritten is better than digital!

Geographic Sphere: Valuation Only Attempt



Group: Valuation Only Attempts

- These people came through your lead center and did not leave behind contact information
- First touchpoint is a mailer to re-engage.

Geographic Sphere: Neighbors of Recently Sold

REAL ESTATE

JUST SOLD

123 ANYWHERE ST
\$550,000

- 4 Bedrooms
- 2 Bathrooms
- Multiple offers
- Sold under 30 days

Yanis Petros
+123-456-7890
123 Anywhere St., Any City

What's Your Home Worth?
The market has changed. Find out your home's value with a free tool that can be accessed via the QR code.

Group: Neighbors of Recently Sold

- These people live within a 1.5 mile radius of a home you recently sold (within the past 6 months)
- Take stock of all of your listings and create a list of the homeowners
- First touchpoint is a Just Sold postcard with a QR code
- Work with your marketing team to update the Just Sold postcards!

Geographic Sphere: Local Advertising

123 Anywhere St., Any City | **THE NEWSPAPER LINE** | www.reallygreatsite.com

BUSINESS REVIEW

LOREM IPSUM DOLOR SIT AMET, CONSECTETUR ADIPISCING ELIT.

 **BUSINESS REVIEW ON DIGITAL MARKETING**

LOREM IPSUM DOLOR SIT AMET, CONSECTETUR ADIPISCING ELIT. NULLA VEL MATTIS NIBH.

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Nulla vel mattis nibh. Proin varius tincidunt molestie. Phasellus et congue erat. Proin vitae urna nisi. Nam tristique eget odio quis pellentesque. Interdum et malesuada fames ac ante ipsum primis in faucibus. Phasellus id nisi congue, placerat urna at, cursus velit. Sed aliquet posuere lorem, a consectetur felis luctus sed. Nunc consequat tortor quam, nec placerat quam placerat ut. Nam eget vestibulum quam, vitae sollicitudin purus. Vestibulum at aliquam massa. Phasellus gravida mollis scelerisque. Quisque non hendrerit magna. Donec eleifend urna augue, sit amet pharetra elit lacinia ut.

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Group: Local Paper Readers

- These people live within a designated community
- Price is typically relatively cheap
- Run it for this week (and maybe next one, too!)
- Look into the Services section
- Leverage the QR code!

Tips/Tricks for Geographic Sphere



How to drive more listings

- Work with your marketing team to update materials.
- Use Canva or a similar tool for templates
- Test different messages
- Speed to lead matters; when a new lead comes in, make sure to follow up immediately. Your goal is a conversation with them about their home!

Any Questions?

Demo

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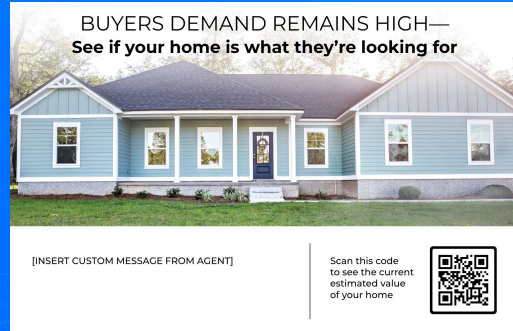
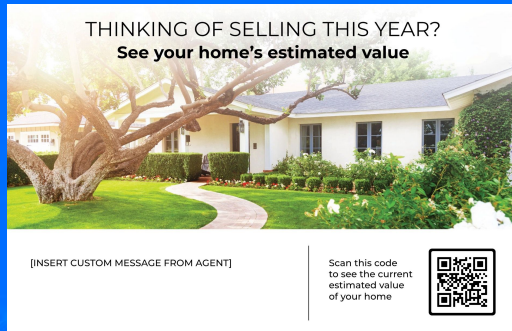
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PERCY - PROVIDED CONTENT

Materials: Agent to Client

Click the images below to download

✓ Geographic Sphere: 3 simple flyers



✓ Social Sphere: 3 simple images with engaging statement



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Engaging Sellers



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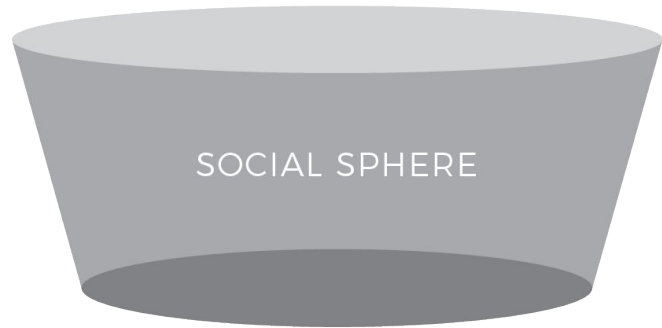
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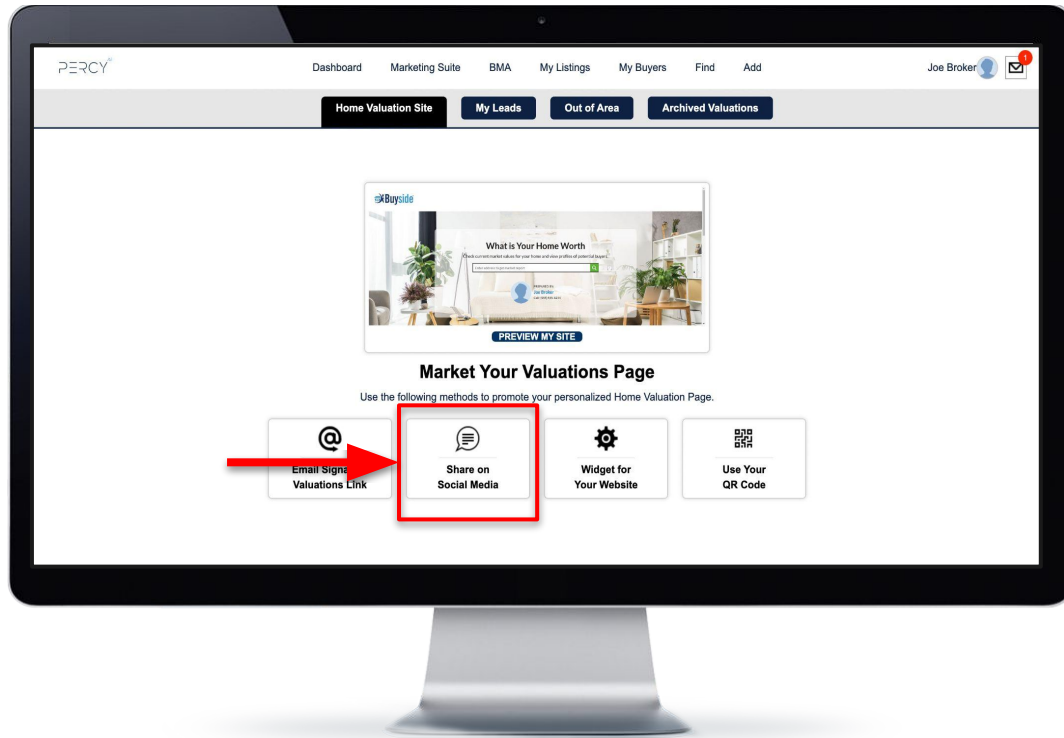
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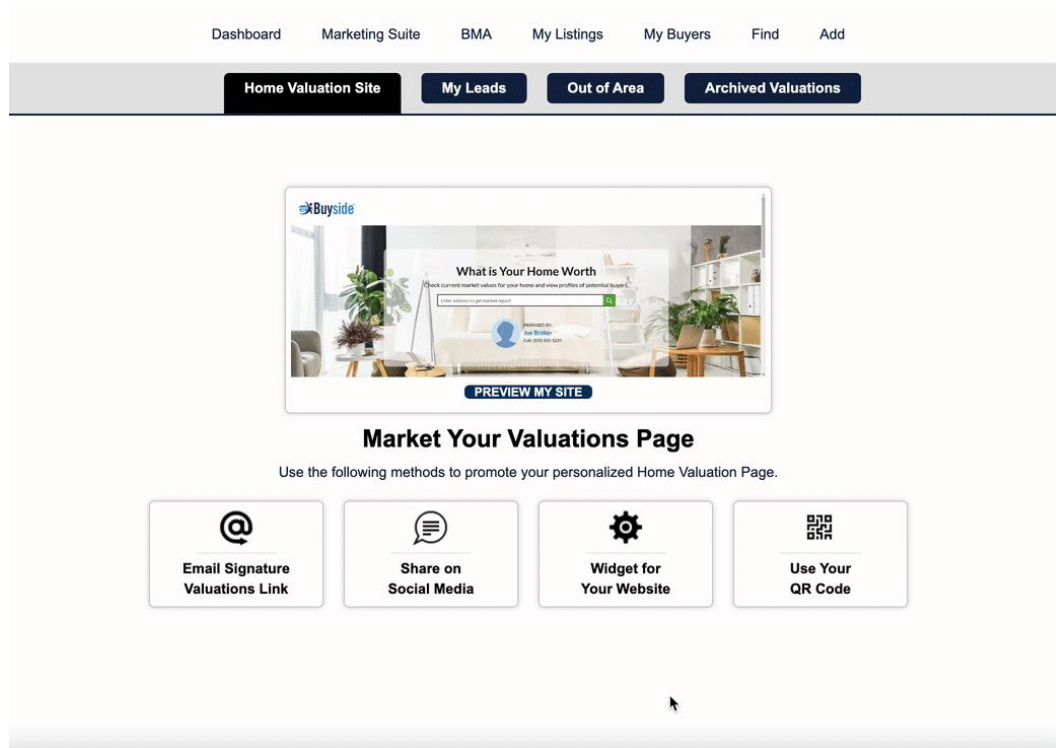
Post Daily on Social Media



How and what sites?

- Use the Marketing Suite to post to the CORE 5 Social Networks
 - Facebook
 - Twitter
 - Instagram
 - LinkedIn
 - Nextdoor

Posting on Social Media



Leverage the Marketing Suite

- Easy place to go to begin your post
- You can also post your exact home valuation URL on the social sites

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

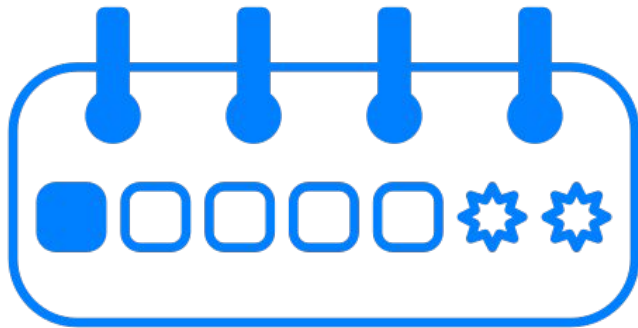
Best Practices



Three Ways To CONQUER Social Media for NHVW

1. **Be Visual:** use images when sharing from Percy!
2. **Monitor/Socially Listen:** for individuals searching to buy/sell their home in order to help them by pointing to your site. DM or comment!
3. **Use Hashtags:** #nhvw #nhvw2023 #realestate, #realtor, #listing, #homes, #realestate, #realestateagent, #realestatetips, #realestatelife, #homeforsale, #houseforsale, #newlisting, #homebuyer, #homebuyer

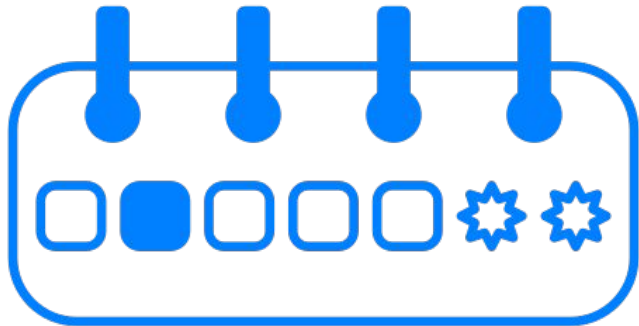
Monday: Discuss NHVW!



Three Sample Posts (Copy/Paste)

1. It's National Home Valuation Week! If you're considering moving or just curious about current market conditions, it's a great time to check in on the value of your home. Get three different valuations to get a full idea of your home's value
2. It's National Home Valuation Week! Curious on what your home is worth? Check it out here:
3. National Home Valuation Week is a time when homeowners take inventory to assess the value of one of their largest assets. The week is an opportunity to review market trends, comparative rates, and most importantly, get a better understanding of the value of your home.

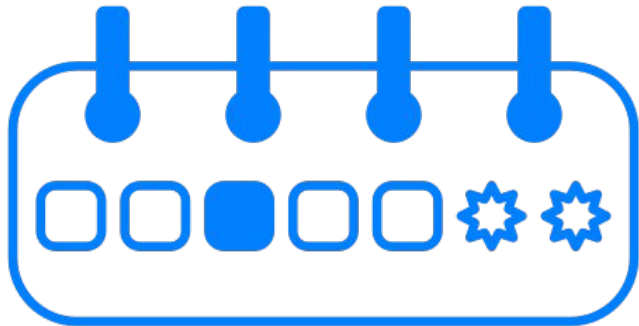
Tuesday: Discuss the Market



Three Sample Posts (Copy/Paste)

1. “What’s My Home Worth In This Market?!” is something I have been hearing a lot lately. Well, I have now made that question easier than EVER to answer, just click this link below.
2. The market is changing. A lot of my clients are worried about their home value. To help navigate this uncertainty, my brokerage brought on a service to help the local community, where we can provide 3 different valuations for you to get a better idea.
3. Buyers are still active in this market. Your house may be worth more than you think! Simply click the link below, enter your home address and discover the current buyer demand for your home.

Wednesday: Focus on Equity



Three Sample Posts (Copy/Paste)

1. If your home is your largest asset, maybe you should keep track of its value? Just click the link and you will get your report on your home's value, for free.
2. Just saw these stats: At Retirement, 83% Of The Avg US Homeowners' Wealth Will Come From Their Homes' Equity."

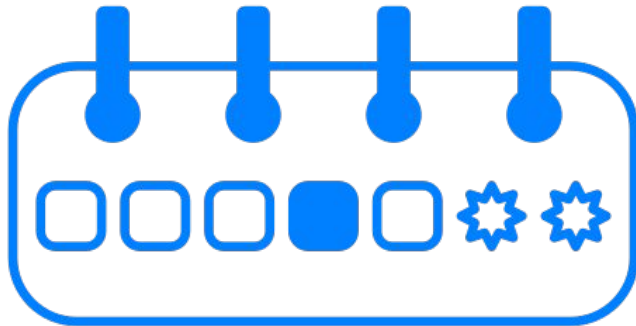
And, there's 10 trillion dollars in equity in the country right now.

See how much equity you have today:
3. There's 10 trillion dollars in equity in the country right now. Make sure you are taking advantage of that potential. Check out how much equity you have here:

Thursday: Discuss the Uniqueness of Percy

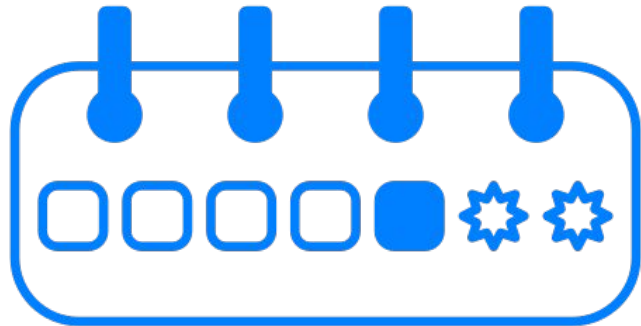
Three Sample Posts (Copy/Paste)

Make sure to change the words in < >



1. Besides Zillow, there are numerous sites that give you an instant value of your home. There are also two other respected sites that I use frequently. In order to find out the #1 home valuation site online, I'm asking for your help to let me know which site, in your opinion, comes closest to your actual home value. Please let me know which one you think is MOST accurate.
2. Buyer Demand is still surprisingly high in **<neighborhood>**. Check it out here. No obligations. No registration. Just trying to help out the community, given today's uncertainty. Would you like to know what your home is worth? Click below for an instant valuation.
3. Inventory is down, but demand is still high for homes. Happy to provide a free market report for **<neighborhood>**. Simply type in your address here and see the buyer demand supply side trends, and recent activity nearby.

Friday: Keep it Short + Simple



Three Sample Posts (Copy/Paste)

1. Would you like to know what your home is worth? Click below for an instant valuation.
2. The market is changing! What's your home worth? Check out the link here to discover your home's value.
3. Discover buyers that are searching for a house like yours today! Click the link below to view real-time buyer activity for your home.

Tips/Tricks for Social Sphere



How to drive more listings

- DM people that had some interest in the past
- Use our templates to create posts
- Post in stories, update your bio
- Videos/imagery works

Send Email Newsletter to Database



Who and what do I say?

- Send a blast email to your database, including warmer prospects
 - Explain what NHVW is
 - Show that you are an expert on the market; leverage some of our talking points about the market

Newsletters / Emailing Your Database

The screenshot shows the Percy 'My Leads' dashboard. At the top, there are navigation tabs: 'Home Valuation Site', 'My Leads', 'Out of Area', and 'Archived Valuations'. Below these is a search section titled 'Filter Key Stats from last 30 days'. It includes search boxes for 'Search by Address', 'Search by Name/Email/Owner', 'Date From' (03-04-2023), 'Date To' (04-03-2023), and 'Filter By'. There are buttons for 'FILTER', 'DOWNLOAD ALL RESULTS', 'DOWNLOAD AVERY LABELS', and 'DOWNLOAD VALUATION ATTEMPTS'. Below the search section is a 'My Leads (7)' section with filters for 'Lead Type', 'Receiving Monthly Reports', 'Claimed a Property', and 'Sent an Inquiry'. The main part of the dashboard is a table with columns: 'NAME / EMAIL', 'OWNER NAME', 'ADDRESS', 'LAST REPORT ACTIVITY', 'VALUATIONS', and 'ACTIONS'. Three leads are listed:

NAME / EMAIL	OWNER NAME	ADDRESS	LAST REPORT ACTIVITY	VALUATIONS	ACTIONS
1 No name provided 3/24/23 @ 4:28pm	B P R S Paradise LLC	10353 Caminito Banyon San Diego, CA 92131 3/24/23 4:28pm	MONTHLY INQUIRY CLAIMED		ARCHIVE ASSIGN TO AGENT
2 No name provided 3/24/23 @ 4:17pm	VAGNOZZI, DEAN & CHRISTA	114 Ithan Ln Collegeville, PA 19426 3/24/23 4:17pm	MONTHLY INQUIRY CLAIMED		ARCHIVE ASSIGN TO AGENT
3 No name provided 3/24/23 @	Messner Stephen C	4426 Lowell St NW Washington, DC 20016 3/24/23 4:15pm	MONTHLY INQUIRY CLAIMED		ARCHIVE ASSIGN TO AGENT

Download all of the leads

- From your “My Leads Center”
- Import them into your CRM

Strategy: Leverage Existing Buyers

Purchase By (Expiring in) [Edit](#)
05/10/2023 (37 days)

Property Types
Single Family Detached

Property Condition
Turn-key

Beds / Baths
4+ / 2+

Share on Social Media [Public Profile](#)

[+](#) [f](#) [t](#) [e](#)

Buyer Strength

- ★ Purchase By **05/10/2023** [Edit](#)
- ★ Ready To Buy **Yes**
- ★ Pre-Qualification Status **Pre Qualified** [Edit](#)
- ★ Represented by an agent

Contact Listing's Agent(s)

I may have the perfect buyer for your listing. I have provided the buyer details below. Please contact me for more information. Let's see if we can make a deal happen!

To the Listing Agent(s) of:

- Select All
- Listing ID: [CSL-285886](#)
1413 Milestone Dr
Silver Spring MD, 20904
- Listing ID: [CSL-428807](#)

Share Buyer Profiles

- If you have a Buyer, share it to social media
- **Great way to engage prospects and push home valuation**

Any Questions?

Demo

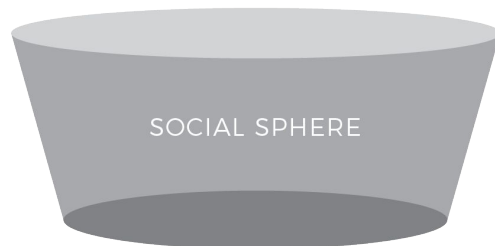
Agenda

How to 2x Your Leads on NHVW

- The Home Valuation Mindset
- Geographic Sphere
- Social Sphere
- **Clients**
- Summary / Preview of Next Webinar

**NH
VW** 2023
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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

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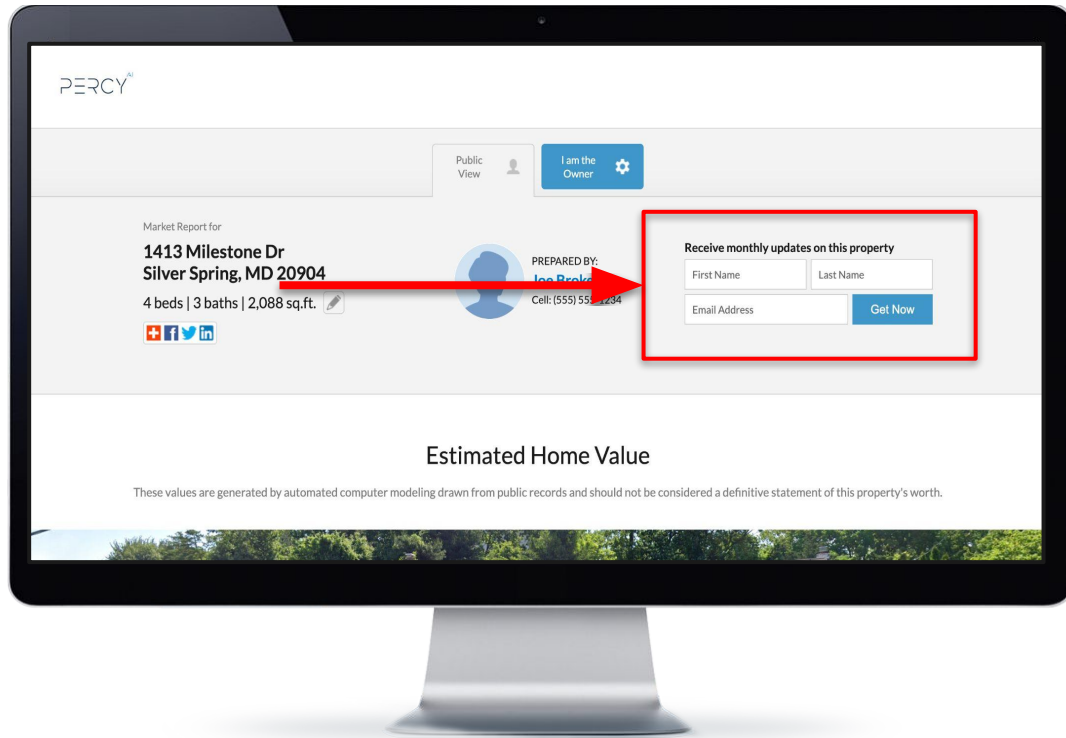
Clients



Auto Subscribe Clients

- The Monthly Report takes little effort to subscribe / unsubscribe.
- We HIGHLY recommend leveraging the Monthly Report as a source of value that you bring to the table as their agent.
 - You become their Knowledge Broker
- It's not just for new clients! It can be used as a marketing tool for existing clients too.

Nurture: Monthly Report



- **How do people subscribe?**

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

You can also sign people up on their behalf!

- **Who subscribes themselves?**

Anyone who leaves their contact info.

Enrolling on Your Client's Behalf

Public View **I am the Owner**

PREPARED BY:
Joe Broker
Cell: (555) 555-1234

Receive monthly updates on this property

First Name Last Name

Email Address **Get Now**

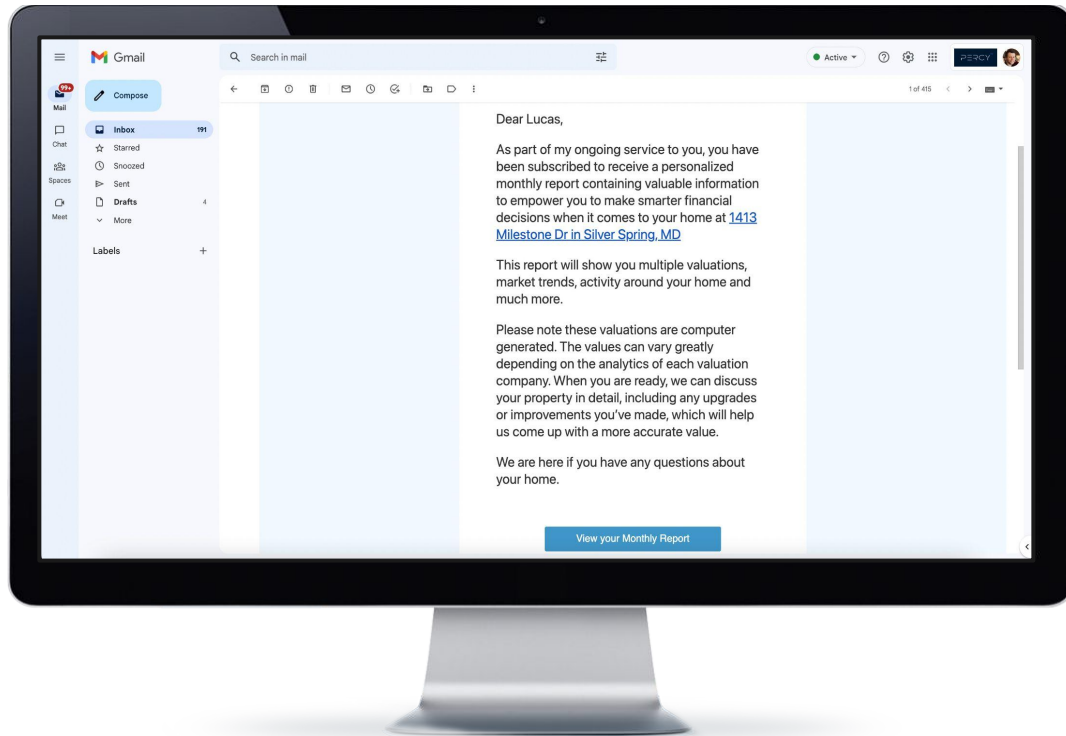
Estimated Home Value

or modeling drawn from public records and should not be considered a definitive statement of this property's worth.

Enroll Your Clients

- Type in their address
- Put in their name/email address

Engaging Your Sphere



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

- **Who can you subscribe?**

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

- **Pro Tip:**

Email your Sphere directly about tracking their equity or include a link to sign up in your newsletter

Email Template That Goes Out

Dear Brandon,

As part of my ongoing service to you, you have been subscribed to receive a personalized monthly report containing valuable information to empower you to make smarter financial decisions when it comes to your home at [4611 Ayron Ter in Palm Harbor, FL](#)

This report will show you multiple valuations, market trends, activity around your home and much more.

We are here if you have any questions about your home.

[View your Monthly Report](#)



Brandon Carroll

PERCY REALTY

P: [\(213\) 123-4567](tel:(213)123-4567) | [MESSAGE ME](#)

Your Experience: Monthly Report

You have a new **Monthly** Report subscription



Dear Brandon,

You have a new **Monthly** Report subscriber for
[4611 Ayrton Ter, Palm Harbor, FL 34685](#)

Every **month** they will receive a report on your behalf. Click the link above for a sample of what they will see.

Subscriber Information:

Brandon Carroll

brandoncarroll.vt@gmail.com

Date Sent: 01/27/23 | 11:05 AM

Client Experience: Monthly Report



Koryn Lipari

SELECT PROPERTIES

P: (314) 835-6000 | MESSAGE ME

Dear Brandon:

As part of my ongoing service to you, you have been subscribed to receive a personalized **monthly** report containing valuable information to empower you to make smarter financial decisions when it comes to your home at [5809 Wabada Ave](#)

This report will show you multiple valuations, market trends, activity around your home and much more.

Please note these valuations are computer generated. The values can vary greatly depending on the analytics of each valuation company. When you are ready, we can discuss your property in detail, including any upgrades or improvements you've made, which will help us come up with a more accurate value.

We are here if you have any questions about your home.

[View Your Report](#)

Agenda

How to 2x Your Leads on NHVW

- The Home Valuation Mindset
- Geographic Sphere
- Social Sphere
- Clients
- **Summary / Preview of Next Webinar**

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Summary

- **The Home Valuation Tool** is a mindset to capture seller leads. Market, Market, Market!
- **Consistency and Speed** are the name of the game when following up with leads.
- Use Percy's **Marketing Suite + Email Tools** to follow up quickly and effectively.
- Establish follow-up practices for your **Social Sphere**, including new lead responses.
- Take advantage of NHVW and send mailers to your **Geographic Sphere** this week!



Coming Up! *Tomorrow* @ 1 pm ET

PERCY^{AI}

National Home Valuation Week 2023
From Agent to Advisor: Thriving in a Low Inventory
Market with Equity Insights



Presented by:

Brandon Carroll
Vice President, Client Success
brandon@percyai

From Agent to Advisor: Thriving in a Low Inventory Market with Equity Insights

Hosted by:

Brandon Carroll,
Percy Vice President - Client Success

ANY QUESTIONS?

PERCY^{AI}

WE VALUE YOUR PARTNERSHIP.