**Lead Stream System**



Our *Stepping Up! Lead Stream System* provides you with a proven process for growing the Stepping Up! Division of your business as quickly as possible. Included is our Action Checklist, templated scripts, presentations and tracking system.

This system is designed to keep you top of mind so that when any agent talks about retiring, your Lead Stream resources know to refer them to you! You’ll want to launch strong, hard and fast!

**Action Checklist (Steps to Success):**

* Always carry your Stepping Up! brochures and Exit Strategies books with you for impromptu encounters.
* Identify Lead Stream resources
	+ Your office and company leadership
	+ Your office agents
	+ Title and Escrow Officers, Mortgage Lenders
	+ Other Affiliate Services (Home & Termite Inspectors, Vendors, etc.)
	+ Coop Agents from previous closed transactions
	+ Your local Association leadership and individual agents
	+ Local real estate related organizations and businesses
	+ Local real estate schools and instructors
* Contact the above resources, within 60 days of launching. Give books, brochures and marketing trinkets.
* Distribute your Stepping Up! Brochures in office and company mailboxes.
* Incorporate the Stepping Up! Closing Letter with each Coop Agent that you close a transaction with. You never know, even younger agents may be moving or leaving the business for other reasons and need your assistance. (See Stepping Up! Closing Letter)
* Utilize the Three Letter Recruiting Program sending the appropriate letter to potential Referring Agents. (See Three Letter Recruiting Program)
* Schedule one CE class per 6 months with your local organization, company or school (ADRE Approved - 3 Hours of Commissioner’s Standards).
* Schedule yourself as a speaker at one of your office meetings within the first 60 days of launching Stepping Up!, using the short (3-5 minutes) presentation.
* Schedule a 30-minute presentation over Zoom or in person to be announced during Office Meetings, Company Meetings, Related Organizations, etc. within the first 60 days of launching Stepping Up!.
* Talk personally with 5 senior agents in your office or company to present the opportunity.
* Distribute at least 20 Exit Strategies books to potential referring agents within the first 60 days of launching your Stepping Up! Division.
* Add all potential Referring Agents to your Lead Stream Tracking System database and launch your follow up tracking sequence to stay in touch personally.
* Send potential Referring Agents to the Stepping Up! home office for inclusion in our monthly eNews mailings.
* Follow up, follow up, follow up with every lead and lead source.
* Add 5 names per month to your database and eNews list.

**Revisit the above every 6 months to keep your name and services alive!**