



Description

Not all lead sources are created equal. Some leads are a better investment than others, so sources must be evaluated for profitability. This workshop covers fresh ideas for identifying and generating organic and paid leads. In addition, we show two approaches to value lead sources and strategies to ensure your lead sources work for your business.

Deliverables

Agents will come away with easy-to-use ideas for evaluating their lead sources and understand why it is essential to track their leads from start to finish.

Preparation

Live Workshop

- Have a computer, projector, and screen/monitor available for displaying the [video](#).
- Set up a whiteboard or flip chart and markers for recording brainstorming responses.
- Provide copies (printed or digital) of the [ROI Spreadsheet](#). This Excel document enables agents to quickly understand a lead source's ROI.
- *TIP: Arrange tables and chairs in a horseshoe shape so attendees can easily view the video and interact with one another during brainstorming sessions.*

Virtual Workshop

- Select a virtual meeting platform that allows for screen sharing, such as Zoom or Google Meet.
- Email attendees the [ROI Spreadsheet](#).
- When sharing the [video](#), also share computer audio.
- Assign a notetaker for the brainstorming sessions.
- Encourage attendees to turn on their cameras to maximize engagement and participation.
- *TIP: If your group is large, consider using the chat feature or breakout rooms for brainstorming.*

Instructions

1. Play the [video](#).
2. Facilitate brainstorming after viewing the video. Record responses on the whiteboard/flip chart.
 - Ask agents which they find to perform better – paid or organic lead sources?
 - Ask how knowing the ROI of a lead source would impact their business?

Best Practices

- Use open-ended questions to generate more conversation.
- Consider putting the [ROI Spreadsheet](#) up on the screen and doing a live demo. The goal is to show the agents how easy it can be to track ROI.
- Suggest agents take a picture (or screenshot if virtual) of the ideas on the whiteboard/flip chart to reference later. Otherwise, ask a support staff person to create a document to send after the workshop.

Next Steps: Go Above & Beyond

- At the next sales meeting, ask attendees to share their experiences and results. Public sharing promotes attendance at future workshops and fosters a collaborative environment.
- Follow up individually with agents you are mentoring to facilitate the application of new ideas and share successes.
- Track the efficacy of your company's learning opportunities. During the next 6-12 months, compare your listing count to the same time the previous year. You are checking to see if an increase is attributable to new skills gained from learning. It typically takes 120 days between skills taught and production increase.