Presentation Guide: Lead Capture Apps

In this session, marketing administrators will train their end users on how to create Lead Capture Apps that can be leveraged for professional events and open houses to generate and automate leads directly into the users account.

<mark>POWERPOINT</mark>

Agenda

- Leveraging Lead Capture Apps for open house, professional events, and much more!
- How and why Lead Capture Apps will help you win and be of value to your business.
- In-platform training
- Best practices when using Lead Capture Apps

Leveraging Lead Capture Apps

- Lead gen tool – Lead Capture Apps serve as a lead generation tool that can be used to capture the contact information of the registrants and/or attendees of open house and professional events directly into your account.
- Multiple templates available – in addition to open house and professional events, you can also leverage other Lead Capture App templates to generate leads.
- Captures leads in-platform – all leads generated through Lead Capture Apps are automatically pushed into your Leads and Contacts.
- Automate follow-up – users will have the ability to automate follow up communication to leads being generated through lead capture apps.

Lead Capture Apps Available

- Brief overview of Lead Capture App templates that are available:
    - Event Registration
    - Open House
    - Home Valuation
    - Home Loan Lead Form
    - Why Us
    - First Time Homebuyer
    - Your Dream Home

How This Helps You Win

- Leads in platform – automatically bring your leads contact information directly into your account.
- Contact sharing – share contacts with co-marketing partners or team members.

- Intelligent automation – marketing automation tool that will expand your network.

Before you begin - assist and guide users with the login process based off your organization's login method

How to Create an Open House Lead Capture App

- This training will consist of 2 demonstrations of how to create a Lead Capture App: open house and event registration. Starting with Open house.
- Click on Lead Capture Apps within the navigation menu.
- Next click on the Create+ button at the top left.
- Click the Layout dropdown and select Open House.
  - Make note of the various templates and options available!
    - Home Valuation
    - First Time Home Buyer
    - Why Us
- Page Name: Internal facing, only the user sees the page name. Best practice for a Page Name for an open house lead capture app is to type in the first/last name of the agent and the listing address of the open house. For example: Reba Realtor 123 W. Elm St.
- Website Address: No action here, address is automatically generated.
- Lead Source: A lead source will be automatically be assigned to leads that are being generated through Lead Capture Apps, so users can track exactly where these leads are coming from and from which specific lead capture app.
  - Best Practice: Create a new lead source for each lead capture app that is created and align the Page Name and Lead Source, so that they are the same name. For example, Page Name AND Lead Source: Reba Realtor 123. W. Elm St.
  - Click Create New underneath the Lead Source heading.
  - Source Name: exact same as the Page Name. Reba Realtor 123. W Elm St.
  - Welcome Email: users may add a welcome email that will automatically be sent to the contact after a lead has been generated.
  - Briefly go over routing, assigning email campaign, sharing, and group options.
    - Click Submit at the bottom right.
- Page Title: allows for the user to put a title at the top of their Lead Capture App.
  - Note the preview on the right-hand side so users can see where the title would appear on the Lead Capture App.
- Lender: will default to the user's profile
- Agent: user will need to select the agent profile they wish to co-brand with on the Lead Capture App.
- Background image: user may add in their own background image to the Lead Capture App otherwise the default stock image will automatically appear in the background.

- Click Save Landing Page at the top left.
- Make note that metrics will be tracked to monitor the performance of Lead Capture Apps: registrations, viewers, and conversion rate.
- Next within the link column, click on View Page to show the final product of the Lead Capture App.
- Point out the active and unique URL that is created. Recommend to copy and paste the URL and share to their social media accounts to promote the open house, and if necessary, send the Lead Capture App directly to the agent for him/her to access and promote as well.

How to Create an Event Registration Lead Capture App

- Click Create+ at the top left.
- Select Event Registration Layout.
- Follow the same steps and directions as above.
- Tip: provide a relevant use case for event registration app, such as:
  - First Time Home Buyer Event
  - Refi Seminar
  - Lunch and Learn
- Note the ability to add a Subtitle in addition to a Title.
- Leave the Show My Profile turned onto Yes for the user's profile information to appear on the Lead Capture App.
- Click Save Landing Page at the top left.
- Remind users of the ability to track the performance of their Lead Capture App by reviewing the registrants, viewers, and conversion rate.
- Reinforce best practices: share the Lead Capture App to social media, send directly to colleagues via email – promote your upcoming event!

POWERPOINT

Best Practices

- Create a new Lead Capture App for each open house, so you can better track where leads are coming from and easily identify from which specific open house event.
- Create open house Lead Capture Apps for your co-marketing partner(s) to ensure you and your agent are getting the most of these events, and to easily obtain contact information of those that registered and/or attended.
- Leverage the lead source feature to automate communication by sending a follow up email or launch an email campaign.

- Take advantage of all 7 template options available to you to target different potential audiences and markets.
- Post your Lead Capture App to your social media accounts to help promote the event and expand your outreach. Use relevant hashtags and messaging to reach your audience.

Going Forward from Here

- For adoption and retention purposes – encourage your audience to access supporting documents, videos, and resources and demonstrate where they can access our Help Center within the platform, as well as reaching out to our Product Support team.