

OPEN HOUSE STRATEGY SERIES

Class Three: *Lead Capture & Systemization: Using Tech Tools*



RECAP OF PREVIOUS CLASSES IN SERIES

CLASS ONE:

Designing Open Houses That Attract Attention

CLASS TWO:

Maximizing Exposure: MLS Strategy & Digital Promotion

Class recordings in the AGRESOURCECENTER

OBJECTIVE

We want to create a repeatable system for every open house.

Capture every open house visitor professionally by using tech tools to eliminate missed opportunities which will turn traffic into longlasting leads through a CRM systems such as BOLD TRAIL.



WHY THIS MATTERS

The Problem with Most Open Houses

- Agents rely on paper sign-in sheets. Can't read writing.
- Incomplete or fake information. System can verify.
- No follow-up system. Agents don't enter into CRM.
- Missed opportunities

→ **RESULT: Traffic with no conversion**

THE GOAL

Your Open House System Should:

- Capture 100% of visitors
- Store contacts automatically
- Organize leads instantly
- Trigger follow-up quickly



WHY TECH TOOLS?

Modern Open House = Digital System

- No more paper sign-ins
- Automated lead capture
- CRM integration
- Faster follow-up

Key Tool Today From REMAX: BoldTrail Open House App*

**If you attended our ELEVATE & CELEBRATE Event key speaker Nick Bailey spoke of having this App.*

ACCESSING (DOWNLOAD) STEPS FOR BOLDTRAIL OPEN HOUSE APP

How to Access Through MAX Center

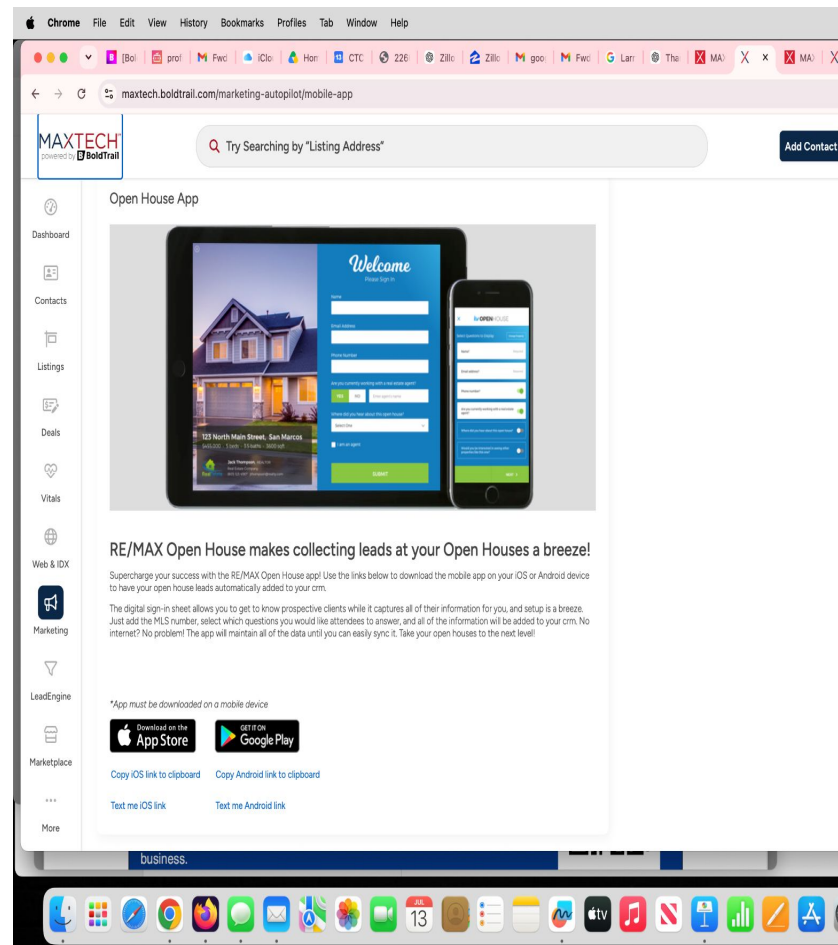
1. Go to **remax.net**
2. Log into **MAX Center**
3. Click **BoldTrail Platform**
4. Download **MOBILE APP** in top right corner.
5. Scroll Down and Select **Open House App**.



DOWNLOADING THE APP

Get the Open House App on Your Device

1. Open Open House App inside BoldTrail
2. Send download link to your phone
or scan QR code
3. Install the app
4. Log in using your BoldTrail credentials



SETTING UP YOUR OPEN HOUSE IN THE APP

1. Open the app
2. Type in Listing/open house address
3. Enter open house date & time
4. Customize sign-in fields
5. Save your setup

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HOW TO USE AT THE OPEN HOUSE

At the Door

- Place device at entry (iPad/Tablet preferred)
- Ask every guest to sign in
- Replace paper sheets completely
- Ensure full contact info is entered

IMPORTANT WHAT TO SAY

Simple Script That Works

“Welcome in! Before you take a look, just sign in here so I can send you the property details and any updates.”



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AFTER THE OPEN HOUSE

What Happens Next

- Leads automatically go into BoldTrail CRM
- Tag as “Open House”
- Add notes if needed
- Begin follow-up immediately

Within 24 Hours

- Send thank you message
- Share listing details
- Ask for feedback
- Offer private showing

BEST PRACTICES

To Maximize Results

- Always use digital sign-in
- Position device where guests can't miss it
- Personally ask every guest
- Follow up SAME DAY when possible. System can send text and/or email.



COMMON MISTAKES

Avoid These

- Not asking guests to sign in
- Letting people walk past the device
- Waiting days to follow up
- Using paper backup instead of digital



When Done Correctly The Results Can Be

- More leads captured to have in your database to stay in front of future buyer or sellers
- Better quality contacts
- Faster and Easier follow-up
- More appointments booked

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Class Four: July 28th at 2pm

Client Conversion: From Open House to Active Opportunity