

Weichert® PRO

WeichertPRO Checklist for Success

Getting Started

- Set up your external email account
- Sync your mobile device for contacts, email and calendar
- Import and/or manually add contacts
- Set up your calendar defaults and Daily Agenda alerts

Managing your Business with WeichertPRO

- Complete your annual business plan on Weichert University
- Sync the Sales Planner with the WeichertPRO Calendar (optional)
- Manage your time using the WeichertPRO Calendar
 - Schedule recurring prospecting time slots
 - Schedule time slots for new customer appointments
 - Schedule recurring business appointments
 - Sales Meeting, Caravan, WLN Meetings
 - Add personal appointments and events

TIP: Use this dialogue when talking to new customers:

“What is it about this property that first attracted you?”

Let them talk, find common ground, then:

“I’m between appointments right now but I’d love to meet with you. I can show you this property and any others of interest. I am available tomorrow at 4pm or Saturday at 10am. Which works better for you?”

Making Money with WeichertPRO

Contact Clean-Up:

- Assign Contacts to a Source
- Create Groups, for example:
 - Sphere
 - Active Sellers
 - FSBO Prospects
 - Active Buyers
 - Buyer Prospects
 - Pure Gold
 - Brokers
 - Open House Prospect
 - Close Rentals
- Assign contacts to a group
- Create the Action Plans for your groups on your WeichertPRO Calendar
- Use the Open House functions to schedule, promote and follow up

Get Support

WeichertPRO Help Desk
973-605-1619
crmhelp@weichert.com

Online
Visit the Training link on WeichertPRO
24 hours a day / 7 days a week.

Weichert® PRO