

SESSION 3

# WORKBOOK

with Jason Lucchesi



# The Tax Assistance Follow-Up Process

NOTES:

## **Tax Assistance Follow-Up**

**Drip Campaign Overview** 

• Definition: A structured follow-up approach

• Frequency: Every 7 days

• Duration: 5 to 6 weeks



## **Tax Assistance Follow-Up**

Follow-Up Steps

- Mailer Follow-Up:
  - If your mailer has been sent, great!
  - If not sent yet, it should be going out soon
  - Check with the team for updates



# The Tax Assistance Follow-Up Process

NOTES:

## **Tax Assistance Follow-Up**

Contacting the Team

• Phone: 317-886-1400

• Email: jason@lucchesey.com

• Team is available for support

• Reach out if you need guidance or feel stuck



## Ringless Voicemail

N	$\cap$	$\Gamma \Box C \cdot$
ΙV		டட்

## **Ringless Voicemail**

#### **RVM Strategy**

- · Schedule RVM once direct mail campaign is confirmed
- Example Timing:
  - If REI Print Mail sends out your tax assistance piece on Thursday
  - Expect inbound calls by Tuesday or Wednesday of the following week
  - Schedule RVM for Friday after confirming mail pieces were sent



## **Ringless Voicemail**

#### Slybroadcast Details

• Website: www.slybroadcast.com

Promo Code: s5885f100

• Bonus: Get 100 FREE credits when using the code



## **Direct Mail**

NOTES:

## **Direct Mail**

#### Be Ready for Calls

- Your direct mail campaign has reached mailboxes
- · Expect inbound calls and be prepared to respond



## **Direct Mail**

#### Call Handling Options

- Answer calls immediately if possible
- If unavailable, returning calls within 24-48 hours is fine
- Use a call answering service like PatLive to ensure no calls are lost



## **Direct Mail**

NOTES:

## **Direct Mail**

#### PatLive & Call Scripts

- Scripts are formatted for PatLive's answering service
- You are NOT required to use PatLive for success

#### Learn More:

www.noflippingexcuses.com/patlive

www.noflippi



## **Direct Mail**

#### Door Tagging Strategy

- Next step: Door tagging for non-responders
- Proven effectiveness: Up to 60% same-day callback rate



## **Door Tagging**

NOTES:



## **Door Tagging**

#### Door Tagging Strategy

- Next step: Door tagging for non-responders
- Proven effectiveness: Up to 60% same-day callback rate



## **Door Tagging**

NOTES:

## **Door Tagging**

#### Recommended Approach

- Use a stamped yellow Post-it note on each door
- Hire local help via Craigslist if unable to do it yourself
- Payment for door taggers:
  - \$1.50 \$4.00 per door
  - \$25 \$50 for gas reimbursement



## **Door Tagging**

#### **Quality Control**

- · Require a picture of every house tagged
- Use a route service for efficiency

#### **IMPORTANT NOTE:**

This is ONLY for people who haven't responded to your letter!



## **SMS Campaign**

NOTES:

## **SMS Campaign**

#### **Quality Control**

- Require a picture of every house tagged
- Use a route service for efficiency

#### **IMPORTANT NOTE:**

This is ONLY for people who haven't responded to your letter!



## **SMS Campaign**

#### Next Follow-Up Step

- · Send text messages to those who haven't responded after door tagging
- · Keep messages short, direct, and helpful
- Why SMS Works
  - Some prospects may prefer texting over calling
  - Encourages engagement without pressure
  - Approach with a mindset of helping, not just making money



## **SMS Campaign**

NOTES:

## **SMS Campaign**

#### Recommended SMS Tool

- We use Freedomsoft for outbound text messaging
- Text Message Examples:



"Hi Mary, it's Tim from Chicago Tax Care. We offer tax assistance in the area. Would you need help with your property taxes?" **Example 2:** 

"Hi Sean, it's Jessica from Florida Tax Care. Are you in need of assistance with your property taxes? We can help. Respond to this message. Talk soon!" Example 3:

"Hi Betty, it's Jason from Indy Tax Care. Was there something I did to upset you?"



## **Outbound Calls**

NOTES:

#### **Outbound Calls**

#### Final Follow-Up Step

- Purpose: Reach out to remaining prospects who haven't responded
- · Calls are semi-warm, not traditional cold calls
- By this stage, prospects have received multiple marketing touches



### **Outbound Calls**

#### Effective Call Approach

- · Keep it short and direct
- Let the prospect do 80% of the talking (Pareto Principle 80/20 rule)
- Call Script Examples:

#### **L** Example 1:

"Hey Patty, it's Jason from Indy Tax Care. I'm following up to see if you received our tax assistance letter. Would you be looking for help?"



"Hello Darla, it's Michael from Indy Tax Care. Would you like to receive assistance with your property taxes?"



## **Outbound Calls**

NOTES:

## **Outbound Calls**

Need Help Making Calls?

 Hire a virtual assistant from Rocket Station to handle outbound calls for you.

Learn more:

RocketStation.com!



## **Postcard Campaign**

Ν	Ю	TF	$\subset$
ı١	$\sim$		٠,

## **Postcard Campaign**

#### Why Use Postcards?

- Highly effective Outperforms other marketing by 5X-10X nationwide
- Another touchpoint for those who haven't responded
- Keeps your offer top-of-mind for those overwhelmed with life



## **Postcard Campaign**

## Timing for Sending Postcards

- Wait 2-3 weeks after completing the previous follow-up steps
- Gives prospects time to process previous contacts
- Ensures you don't overwhelm them



## A-B, B-C TRANSACTION vs. WHOLESALE

NOTES:

## A-B, B-C TRANSACTION vs. WHOLESALE

A-B, B-C Transaction

- Two Purchase and Sales Agreements:
- One with the owner of record (A-B)
- One with the end buyer (cash investor) (B-C)



## A-B, B-C TRANSACTION vs. WHOLESALE

#### **Escrow Agreement:**

- Provided by the title company
- Ensure it's in place before proceeding
- If Escrow Agreement Isn't Allowed:
  - Use Transactional Funding to complete the deal



www.besttransactionfunding.com



## A-B, B-C TRANSACTION vs. WHOLESALE

N	$\cap$	
ı١		ı LJ.

### WHOLESALE TRANSACTION

- Purchase and Sales Agreement Signed between you and the owner of record
- Assignment of contract signed between you and the ultimate end buyer (cash investor)



#### **NEED FUNDING FOR YOUR DEALS?**

- Mainly for fix n' flips, new constructions, and rentals (BRRR deals).
  - Upright https://www.upright.us/
  - Lima One Capital https://www.limaone.com/
  - Finance of America https://facolending.com/



## A-B, B-C TRANSACTION vs. WHOLESALE

NOTES:			

## **Need An Attorney To Review Your Documents?**

- Rocket Lawyer https://www.rocketlawyer.com/
- Legal Zoom https://www.legalzoom.com/
- Referrals from:
  - Local REIA (check MeetUp https://www.meetup.com/)
  - Realtor
  - Title Company
  - Other Wholesalers/Investors
  - Friends/Family



## Homework

## **HOMEWORK: Copy and Paste**

Homework Challenge: Building Your Cash Buyers List & Door Tagging Strategy

- ▲ Cash buyers are the backbone of your deals! Your goal should be to have 5-10 solid investors (minimum) in your pipeline. Let's make it happen! ☐ Your Homework:
- 1 Cash Buyer List:
- How many active investors do you have right now?
- What types of properties are they looking for? (Land, SFRs, MF, Mobile Homes, STRs, etc.)
- 2 Door Tagging Prep:
- Stamp & Post-it Notes: Have you ordered your custom stamp (Staples/Office Max) and yellow Post-its yet?
- Route Planning:
  - If going yourself, what's your game plan?
  - If doing it virtually, have you found someone for boots-on-the-ground support? (They don't need real estate experience—just a valid driver's license, registration, and insurance).
- 3 Posting in the Group: Drop an update on:
- ✓ How many cash buyers you have by day 5
- If you've spoken with a title company, escrow officer, or attorney who is good to go with investor deals
- ✓ If you've ordered your stamp and Post-it notes
- If you're virtually tagging, confirm that you've found someone to work with
- ♣ Drop your progress in the comments! Let's hold each other accountable and grow together.

#RealEstateInvesting #CashBuyers #Wholesaling #ScalingYourBusiness



**NOTES:**