HBBLeads.com
Home Based Business Leads

How to Take Notes on Your Leads

Have you ever heard this saying?

"THE FORTUNE IS IN THE FOLLOW UP"

Well, when you take great notes on your leads, you are going to increase your success...

- ✔ **Learn what is... and what is not... getting you results**
- ✔ **Know your ROI**
- ✔ **Easier follow up calls**

When you take great notes on your lead calls, your results always continue to improve!

If dialing leads is not yet getting you the great results you desire, yet hear other people having, you will learn exactly why when you take great notes on your leads.

Exactly what step is not working? It is getting voicemails answered? It is your introduction interview? Is it the follow up after a presentation?

You can then look at the patterns, show your notes to your upline, ask HBBLeads support for help, search our training articles, google search, or ask an expert.

Note taking and follow up is a critical step to have success with dialing leads. Use the following pages to take better notes with your leads. Be sure to add more columns and rows to our sheets, customize them, and use whatever methods work best for you.

Pick a Calendar

In addition to taking notes you absolutely need a Calendar before you call leads.

Pick one, stick to it, and use it every day. Here's a few ideas:

- ✔ Your daily planner
- ✔ A wall calendar
- ✔ A desktop calendar
- ✔ An app on your smartphone
- ✔ Prospect Toolbox: use the Events calendar for automatic reminder emails, text alerts, and more.

How Many New Leads Per Week Do You Dial?

Depending upon the volume of leads you are currently working with, you may want different solutions for the easiest management.

Printing each lead or handwritten: 25-50 leads per week

Spreadsheet: 25-100 leads per week

Prospect Toolbox: 50-1,000 leads per week

Taking Notes

It's UP TO YOU, to decide what information you need to remember for future calls and appointment. Here's some ideas to get you started.

1. **Always start with a Phone Call.** *(If you need suggestions on what to say visit our Scripts Training and other training content at HBBLeads.com)*
    a. **Ideas:**
        i. What are their income goals?
        ii. How many hours per week can they dedicate to a new opportunity?
        iii. What have they done for work before?
        iv. Did they watch a presentation from you? Which one?
        v. What did they like about the presentation?
2. **Always write the DATE next to every phone call, voicemail, etc.**
3. **Schedule follow up calls your calendar.** You will need to schedule follow up calls if you called them at a time they are busy (most common), to do a 3-way call with someone else, to give them a longer presentation, to follow up and answer a question you did not know the answer to. Use whatever calender you will actually check every day. It can be a paper wall calendar, an app on your smartphone, etc.

Abbreviate your notes:

P – phone call

VM – voicemail

VM 1 – left 1st voicemail

VM 2 – left 2nd voicemail

EM – Sent email

TXT video – texted a video link (with their permission during the call)

NA – no answer

BAD – bad lead with non-working number, wrong person, etc.

DND – do not call again, remove from list

Example Notes:

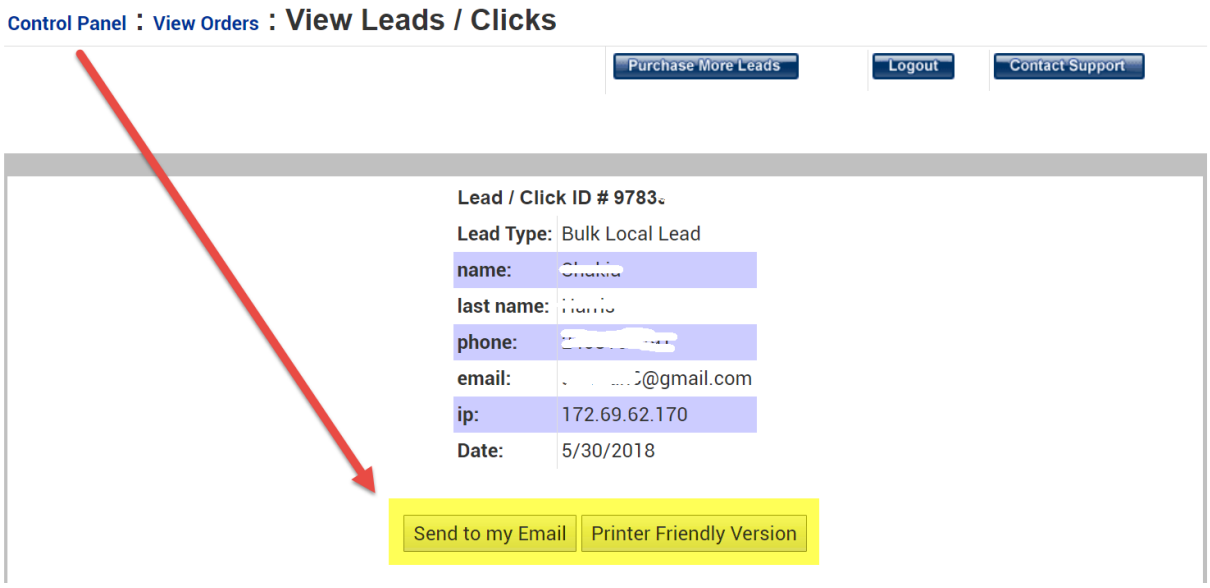
Lead Name	Email	Phone	Notes	Next Meeting?
Angela	Angie42866@icloud.com	749-000-3355	7/25/18 P, TXT video, called back after video, lead said they liked the products but worried about $500 start up cost. Has kids named Amanda and George in elementary school. Wants to know about selling products at local events. May not be able to join yet.	✓ Schedule 3-way meeting call with upline about selling products at events. ✓ Ask upline about $500 start up cost objections ✓ Angie said I can text 555-111-6677
Luther	Lutherray2456@hotmail.com	867-333-9999	7/25/18 P, used to work in construction but laid off, looking for part time work. Was busy and need to call back later.	✓ Call back 7/25/18 at 5pm EST
Danny	danjohnny@yahoo.com	222-725-9233	7/25 VM 1, EM	✓ Call 2nd time later this week
Amanda	amsoftball@gmal.com	733-777-4444	7/25 VM 1, EM – missed return call while on another call, left VM2	✓ Try to call again later today 7/25

Print Each Lead

Some customers like to print every email, on a single piece of paper, then write in notes during the call. Then use a 3-ring punch to put the good leads in a binder with all of their notes.

Most of the Live and Fresh Leads from HBBLeads can be delivered to you via e-mail, one lead at a time. You can choose this option during checkout for your order, or contact our support staff.

You can also send each lead to yourself via email from inside of your customer account. (see image below)



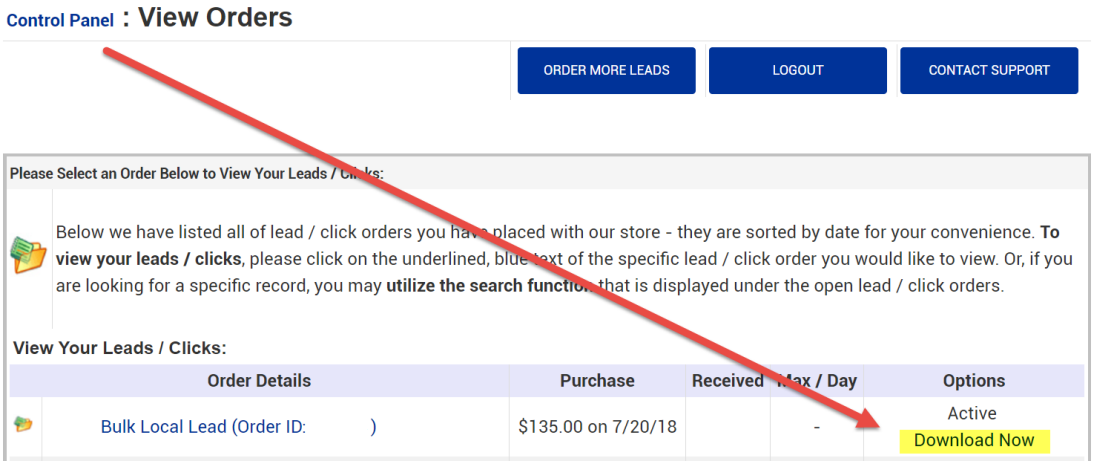
Spreadsheets

All leads from HBBLeads are available as a CSV spreadsheet (this simply means that the leads name, email, phone, etc. is separated by a comma “,”)

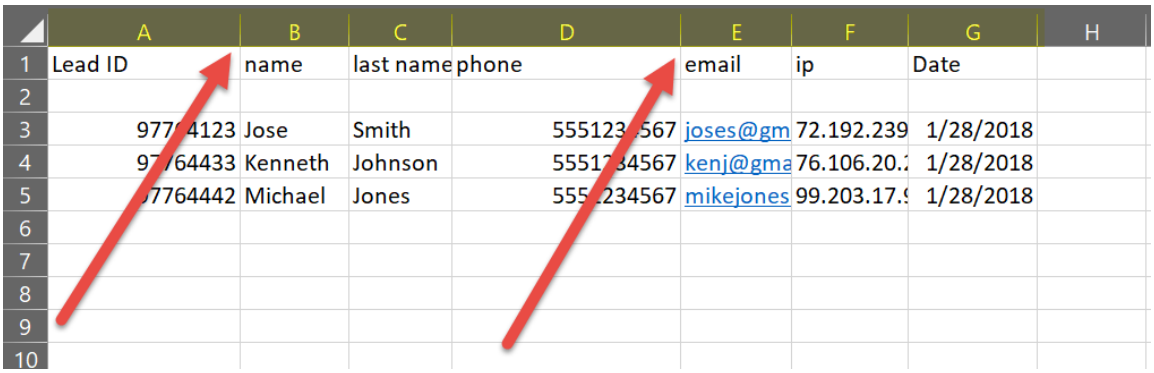
You could either keep filling in the information on your computer or print your spreadsheet to write in notes.

Spreadsheet Instructions:

1. Login to your customer account ay HBBLeads. Download your leads from HBBLeads *(be sure you see leads delivered in the “Received” column next to your order)*



2. You will need to expand the columns in your spreadsheet program to see all of the data.



3. Format the spreadsheet to add more space for writing your notes. When you are on the phone with a lead you can take notes right inside your spreadsheet, always remember to save when finished.

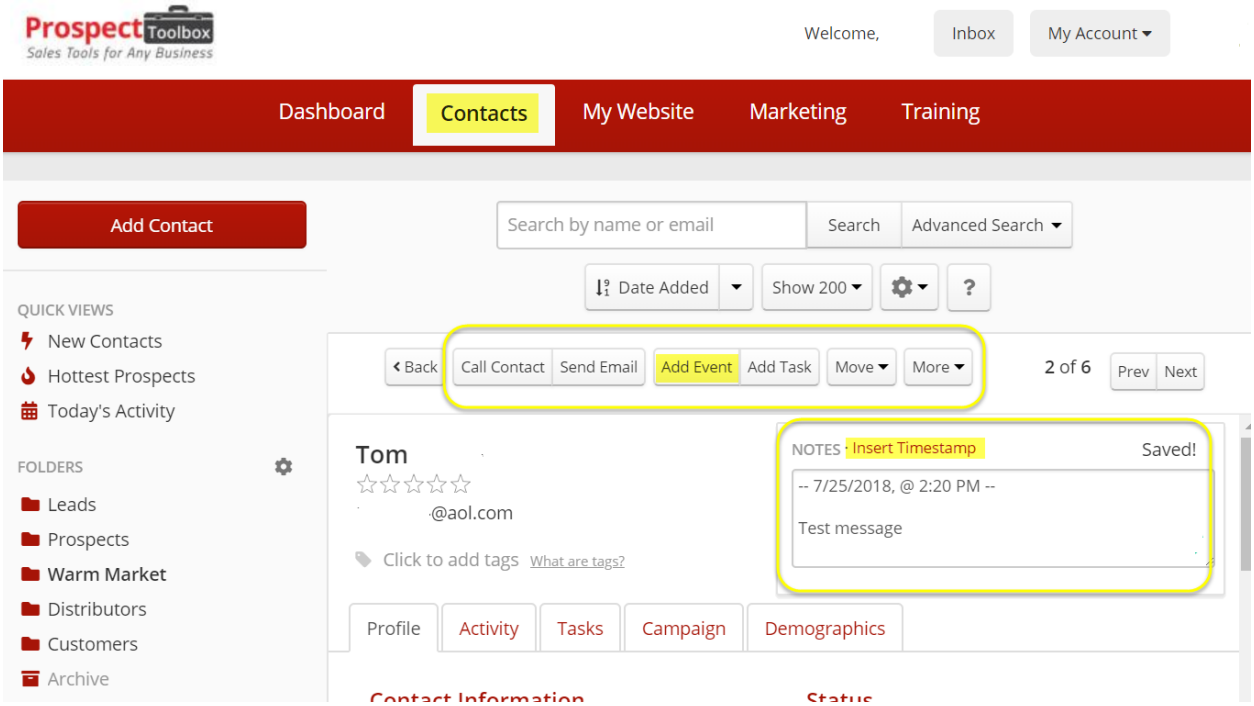
	A	B	C	D	E	F	G	H	I
1	Lead ID	name	last name	phone	email	ip	Date	Interview Notes	Next Meeting?
2									
3	97764123	Jose	Smith	5551234567	joses@gm	72.192.239	1/28/2018		
4	97764433	Kenneth	Johnson	5551234567	kenj@gma	76.106.20.	1/28/2018		
5	97764442	Michael	Jones	5551234567	mikejones	99.203.17.	1/28/2018		
6									
7									

4. In a spreadsheet you can keep adding columns to the right for follow up calls and adding more information. You can occasionally go and copy all of your GOOD leads into a new spreadsheet, note taking program, etc. where you have more room to continue taking notes. You can use the tabs at the bottom for different kinds of leads.

5. Keep adding to your spreadsheet in whatever way works best for you.

Prospect Toolbox

Inside of Prospect Toolbox is an area for adding a date stamp, note taking, and adding "Events"! Events will send a reminder email to the lead, add it to your calendar, send you reminder e-mails, and more. You can even set up Text Alerts" to remind you of follow up appointments.



Phone Burner

Inside of Executive Level Prospect Toolbox is Phone Burner. When using PhoneBurner you automatically log what happened on each call! (Fax machine, no answer, VM, etc.)

You can then "search" your leads any way that you want… by date range, area code, number of voicemails… there are infinite options.

Watch the Video

Fortune is in the Follow Up!

Let's Review!

At the end of every day look over all notes.

- ✔ Is there a specific word, phrase, or script that you mentioned… that gained more / less interest?
- ✔ Is there a specific video that had no response?
- ✔ What worked the best today? What didn't work today?
- ✔ Who can you ask specifically for help about what didn't work?
  - *Example: Look for specific scripts from HBBLeads, or ask your upline for a better video presentation. Keep improving what isn't working!*
- ✔ How many calls did you make?
- ✔ How many scheduled a presentation?
- ✔ How many scheduled a follow up?
- ✔ How many joined or are interested in joining?

When you take great notes:

You will start to notice WHAT DOES WORK and WHAT DOES NOT.

You can ask for specific advice from your upline leaders, HBBLeads, and experts.

Soon, you can start to use only scripts, videos, etc. that get you great results!

You will know which types of lead orders are working for you, and which ones are not.

Like learning how to play guitar, or learning how to do anything, you will keep getting better!

End of day make a list:

___ Calls ___ Presentations ___ Appointments ___ Very Interested ___ Enrolled

Helpful Reminders:

Have you, or anyone you know, within 30 minutes of showing your business to a family member or best friend… received an enrollment within those first 30 minutes?

Never!

How many enrolled after a few days? A week? A month? (usually a few).

Remember that leads are just people like you and me. They need time to build a friendship, trust, get all of their questions answered, think about it, etc.

When you call leads, take notes, and track your results…

This is called a SALES FUNNEL.

And you are adding more and more people to your SALES FUNNEL.

The more you improve your funnel, eventually the more people you have ENROLLING at the end!

(___ Calls ___ Presentations ___ Appointments ___ Very Interested ___ Enrolled)

You are doing what is called Split Testing. Which means that you can try different scripts, videos, etc. and learn which ones work the best.

When you are using the best script + the best video + the best follow-up methods…

And everything is clicking into place and working for you…

Guess what happens next?

$$$$$ 😊