



# Know Your Numbers:

## Marketing without math is just guessing

- Let's put some science behind your lead generation strategy.

### **Organic Website Leads** - CLOSE RATE: MEDIUM | COST: LOW

Leads that find you through search engines, directory listings, ai search answers, or by directly typing your URL. These typically have high intent but variable volume and take time to build up.

### **Paid Ads (PPC)** - CLOSE RATE: HIGH | COST: MEDIUM-HIGH

Leads generated through Google Ads, Bing Ads, LinkedIn, social media advertising, or other paid digital channels. These can be scaled quickly (within a few days) but at a cost.

### **Referrals** - CLOSE RATE: HIGH | COST: LOW

Leads that come from existing clients, partners, or other stakeholders. Often highest quality but not always predictable in volume. How much do your clients love you? Enough to recommend you to their family and friends?

### **Acquisitions** - CLOSE RATE: HIGH | COST: HIGH

Leads from purchasing existing property management portfolios from other companies. Often allows for rapid growth but requires capital investment. \*Expect Attrition

### **Outbound** - CLOSE RATE: VERY LOW | COST: LOW

Leads from direct outreach through mail, networking, cold calling, and other proactive methods. Requires consistent effort but can yield targeted results.

### **Receivership** - CLOSE RATE: HIGH | COST: NONE | DIFFICULTY: HIGH

Court appointed properties in distress. This aids banks, investors, and property owners ensure legal compliance while working towards financial recovery

## 1. Cost & Conversion by Lead Type

Lead Type	Cost Per Lead (\$)	Conversion Rate (%)	Time to Close (Days)
Organic			
PPC			
Referral			
Acquisition			
Outbound			

### Marketing Self Assessment:

Marketing Channel	Do You Have It? (Y/N)	Effectiveness (1-5)	Steps to Improve
Great Converting Website			
Local SEO			
Social Media			
PPC (Google, Bing, etc.)			
Content			
Reviews			
Video			

## 2. Lifetime Value (LTV) of a Customer

- **Annual Revenue Per Unit:** \_\_\_\_\_ (management fee + all other fees)
- **Average Number of Years a Client/Owner Stays (Tenure):** \_\_\_\_\_
- **Average Units Per Client:** \_\_\_\_\_ (# of units divided by # of owners)

**Customer LTV Calculation:**

Unset

**Annual Revenue Per Unit x Tenure x Units/Owner**

**Calculated Lifetime Value:** \_\_\_\_\_

Visit our Calculator!



### 3. How Much Should You Spend?

(Based on your LTV above)

Strategy	% of LTV	Target Spend Per Client (\$)
Conservative	10%	
Balanced	15%	
Aggressive	20%	

### 4. Ideal Client Profile (ICP) and Brand Positioning

- Describe Your Ideal Client (Owner)

---

---

---

- Describe Your Ideal Property Type to Manage:

---

---

---

- Where Can You Find These Owners? (Neighborhoods, events, platforms)

---

---

---

- Unique Offering or Brand Message That Sets You Apart:

---

---

---

## 5. Types of Leads: Where Will You Allocate Budget?

Lead Type	% of Budget	Notes/Plans
Organic Website		
Paid Ads (PPC)		
Referrals		
Acquisitions		
Outbound		

Total % (should = 100%): \_\_\_\_\_

Question: What is the **ONE THING** you need that will help make this allocated budget more effective?

## 6. Your Funnel Breakdown

- **Lead to Contact:** \_\_\_\_\_ touchpoints over \_\_\_\_\_ days
- **Contact to Qualified:** \_\_\_\_\_ touchpoints over \_\_\_\_\_ days
- **Sales Call to Close:** \_\_\_\_\_ touchpoints over \_\_\_\_\_ days

What CRM are you using?

(Aptly, LeadSimple, Hubspot, other?)

Do you have lead clarity or a documented process for moving a lead through your funnel stages?

(New Lead → Qualified → Sales Call → Closed)

Response Time Audit: On average, how quickly are inbound leads responded to?

(Options: Within 5 minutes / Within 1 hour / Same day / Next day / 2+ days)

Drop-off Points: Where do most of your leads drop off in the funnel?

(Lead to Contact? Contact to Qualified? Sales Call to Close?)

## 7. Action Planning

- **Identify Your Best Lead Source:** \_\_\_\_\_
- **Choose a Growth Area:** \_\_\_\_\_
- **One Specific Action to Take Next Week:**

---

---

---

**Pro Tip Section:** Use the Traction principle: Set one clear, small goal each week that ladders up to your larger growth goal.

Think 'rocks' broken into 'pebbles.' One action, one week at a time = major results over time.  
All marketing costs time or money, if you don't have the time, hire a digital marketing agency.

"What is ONE small action you can take next week that ties into a larger quarterly goal?"

## Bonus: Notes from Group Exercise

### "Finding New Owners"

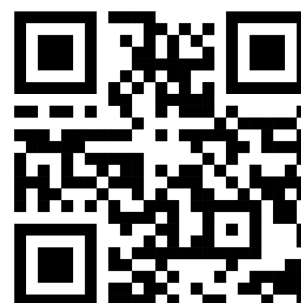
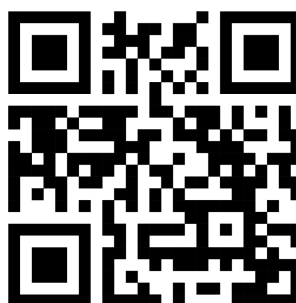
- Tactic #1: \_\_\_\_\_
  - Tactic #2: \_\_\_\_\_
  - Tactic #3: \_\_\_\_\_
- 

**Tip:** Scan the QR code on your handout to access the free LTV calculator and additional resources!

Lifetime Value Calculator

How to Generate Leads

1on1 Strategy Session



---

Thank you for attending! Let's build smarter, more profitable growth together!



