# POP-BY PLAYBOOK

**USE EVERY CYCLE**

Pop-bys are small gifts realtors order through you, then pick up from you in person. They're offered to your top-tier agents every cycle, and now and then to mid-tier agents and new targets to show them what we offer.

**The face-to-face is the whole point.** Pop-bys are your reason to meet up with a realtor. Every pop-by ends with you sitting down with them for coffee, stopping by their office, or having them come in to pick them up.

## WHO GETS POP-BYS

| TIER | HOW OFTEN |
|---|---|
| **A's** (top tier) | Every cycle |
| **B's** (mid tier) | Occasionally, especially B's you want to move up |
| **New targets** (C's and D's) | Once in a while, to show them it's something we offer |

**The cap:** The number of pop-bys a realtor can order is capped, so the loan officer is never charged more than **$25 per realtor order**.

## THE POP-BY CALENDAR

Pop-bys are ready for pick-up six times a year: February, April, June, August, October and December.

| OFFER MONTH | SEND OFFER EMAIL | ORDERS DUE | READY FOR PICK-UP |
|---|---|---|---|
| January | 1st week of January | 3rd week of January | **1st week of February** |
| March | 1st week of March | 3rd week of March | **1st week of April** |
| May | 1st week of May | 3rd week of May | **1st week of June** |
| July | 1st week of July | 3rd week of July | **1st week of August** |
| September | 1st week of September | 3rd week of September | **1st week of October** |
| November | 1st week of November | 3rd week of November | **1st week of December** |

## HOW A CYCLE WORKS

1. **1st week of the offer month:** Email the pop-by offer with the order link and due date.
2. **Right after:** Call to make sure they got the email.
3. **Before the 3rd week:** Follow up with anyone who hasn't ordered.
4. **1st week of the pick-up month:** Pop-bys are ready. Call to schedule a meet-up.
5. **Meet up:** Coffee, their office, or they come in to pick them up.

## BEST PRACTICES

- **Email first, then call** to make sure they got it.
- **Follow up before orders close** the 3rd week.
- **Know the cap:** never more than $25 per realtor order.
- **Schedule the meet-up right away** once pop-bys are in.
- **Don't just drop them off.** Plan to sit down with the realtor.
- **Include your card** with every pop-by.
- **Share ideas for using them:** open houses or delivering to clients.
- **Use the meet-up** to share updates and make an ask.
- **Mix in B's and new targets** now and then.
- **Log your activity.**

**All weekly plans and scripts are on FACWmarketing.com.**