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1381 – I Mastered FreedomSoft in 1 Hour and You Can Too

Hosted by: Joe McCall

Joe: Hey, what's up, everybody? Joe McCall here. I just did a two-hour masterclass on FreedomSoft, and I dove so deep into the weeds I thought, no. So I wanted to do it again. But just highlight the most important things here and show you a quick overview of advanced freedom. Soft stuff. But I'm going to fly through it really fast. My intention with this video is to get you to think bigger about seeing the bigger things that FreedomSoft can do for you and just demo it so that you can know what to do when a new lead comes in. And so I'm going to start real quick here and just dive into this on my move this so I'm out of the way. All right. Let's say we have chosen to do a market like Citrus County, Florida was a market I was in before, and I don't want to target the whole entire county. I just want to target a few specific zip codes. I don't want to do spray and pray marketing. I want to be focused real quick in here. So I'm just going to go to Tools Zip Finder Land and let's go to Florida and let's do county and citrus. I just picked citrus for whatever reasons and search. I have no specific reason for picking Citrus County. It's a good county. A lot of land there. But look at so instead of targeting the whole all of the zip codes, what if we just targeted the top two zip codes? Let's say right now from here you can click find buyers. We're going to look for active buyers. Advanced search. I'm going to remove duplicate owners. Absentee owners. Okay. Out of zip code owner. I don't care where they live. And they bought it within the last four months and then boom, land filters. I don't care about the size necessarily. And we click search and this is going to bring us the most active buyers that are buying land in a certain area. There's 345 of them. So I'm just going to select all pages here. So the standard 45 and I'm going to add them to a list and I don't really need a reference number, but we'll just do this and I'm going to give it a list here. Citrus County, Florida, Active Buyers. And you choose the Workflow Automation Joes Main Vacant Land workflow. By the way, there is a custom signature edition of FreedomSoft. And for the things that I'm showing you here are going to be in the in that version, which you all should have if you do Now, if you want to buy, if you don't have it right now, if you're watching this somehow, if you go to Freedom Soft Now.com, Freedom Soft Now.com will take you to a page like this where you can get a dollar trial for 30 days. So check that out. After that, it's \$197 to \$297 a month. All right.

Joe: So here the buyers are being added to this list right now as we speak. Now we want to get the sellers. We want to pull the sellers from those the people who own land in those two zip codes. I'm going to click find sellers, all land advanced search. I'm going to remove



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duplicate owners and I only want out of zip code owners. That means these are people that live outside of that zip code, financial filters. I'm going to say they bought it at least five years ago, so I choose today's date. And so they had to have bought it before 2020. Unknown And then I'm going to do land filters. I don't want really cheap property, so I'm going to do point two acres to, let's just say ten acres uncheck, include unknown and we're good search. Now it's going to pull more property here than I probably want to do in this demo. There's going to be probably tens of thousands, maybe 20,000 vacant land owners in those two zip codes is going to keep on getting bigger and bigger. Maybe not that many. 5000 maybe. I don't know. We'll see. But we're going to get list of vacant land owners in those two zip codes and we're going to send them some marketing. But the first thing we need to do is we need to create a campaign and we need to get a phone number that we can put on the marketing and the letters that we're sending out. Right. So I'm going to go up here. Oops, I'm going to go up here to Settings. I'm going to go to phone and I'm going to buy a new phone number, but I'm going to pause this real well. Let me just do this here. I'm going to do 813, I think is the area code that I picked earlier. All right. So I bought this phone number with an 813 area code. I'm pretty sure that's a Florida area code. And I'm going to record a quick message here. I'm just going to click record message. And by the way, if I'm going through this really fast, it's okay because you can pause this video, right? Rewind and whatnot. If you don't want to learn freedom soft, find somebody who will learn freedom soft. Maybe it's a kid, maybe it's a virtual assistant. And just send him this video and have them do this stuff for you. That makes sense. All right.

Joe:

So I'll record a quick voicemail here. Hey, this is Joe. Thanks for calling. You must have received one of my postcards about some vacant land that you own. If you want to sell your property, then please leave your name and number. And the reference ID on that postcard we sent you. And I'll send you an offer again. Leave your name and number and the reference ID in that postcard. I'll send you an offer right away. Thanks. That's the voicemail they're going to hear when they get my postcard or my letter. All right. And I'm also right here going to do a call order reply. It's just going to say thanks for calling. What is the reference ID number on that mail we sent you? Thanks, Joe. Okay, so that phone number is set and I'm going to go back here to phone and I'm going to make sure these calls are being recorded and just do that to record calls. Now, one thing that I this is my demo account. I do not have my phone system set up. So it's really important you go through these steps with the business profile business registration so that you can send and receive text messages. Right now, if you don't do this, you can receive text messages, but you can't send them out. So it's real important you complete that phone system set up. All right, cool. So now we need to create a campaign. So I'm going to go leads, leads, inbox campaigns. This is another demo I had. I'm going to create a new campaign for Citrus County in this demo. Your citrus. You know what I would probably do? Let me actually let



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me just delete this one, because what I typically do is I create new campaigns. I might be in five counties in one state, so I'm going to have one county for each state. I will campaign as a bucket where all these leads come in, right? So I'm actually going to delete this one. I'm a create a new campaign. I'm going to call this Florida Land sellers. I want to call it to just in case that other one's still floating around there. So it's direct mail. Sellers. The phone number I'm going to use is actually hold on one second. So I'm just looking at this. I didn't need to buy that other phone number. I could have just used this other phone number I had. So I'm going to real quick delete this, miss this phone number that I just bought from it. Delete this old one right here. All right. And then I'm just going to update this one that I just bought and call it instead of Citrus County. This is a phone number for all of Florida. It makes sense. All right. Florida land sellers two, I'm going to call it that has got my 17 second message on there. Saved changes. Okay, cool. So now I only have one phone number, so all of I might have multiple lists of all the different counties in Florida, but I'm going to have one phone number. All of my direct mail will come to that campaign for Florida. And that makes sense. All right.

Joe:

So let me then go back to Leads inbox campaigns. I'm going to create a new campaign called Florida Land Sellers. I might call this campaign. How much is direct mail sellers choose that phone number that I have right there. Workflow automation. This is real important. You pick the Joes main vacant land workflow or whatever it's called. It's my workflow automation that I put into my version of Freedom. Soft has all of my automation stuff in it. Create campaign. All right, So just like that, now we have a campaign that's assigned to that phone number right here. So we're going to send out postcards with this phone number on it. They're going to call that phone number. And all those calls are going to go into this campaign bucket called Florida land sellers. We also have a list of buyers. Now we need to actually create a list for sellers. Remember who are here in the zip finder. We close this tab. All right. Did it do it? You know what? Hold on one second. So I didn't create a list yet. Remember, we were here at the zip finder. Now I got these two zip codes selected. I'm going to click find sellers. I mean, just do this again. I did it already, but I didn't finish it. So I'm going to remove duplicate owners. Vacant land only add a zip code owners. I want them to have bought it at least five years ago. So I'm just going to say they're only 20 and then I want all land, right? Land filters. I don't want the really cheap dinky ones, but I want quarter acre. Now, if I was in like Pennsylvania or something, I'd probably do one plus acres if I was in North Carolina. And I want to avoid all those highways with lot little subdivisions. I might do two plus acres. But Florida, there's a lot of these little infill lots that are selling. So I'm going to do point two acres and bigger click search. Okay? Now this is going to go on and on and it might get 5000, 10,000 records. I'm going to go ahead and stop it after it gets passed to 993. All right. There's going to be thousands more. But I'm just going to select one page and I'm going to add this to the lead list. And the reference ID



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number is important. We're just going to call this citrus. Let's make it simpler. City 1000. I'm going to create a new list. This is going to be called Citrus County, Florida. Now, remember, we were only in those top zip codes. Three, four, four, three, four, three, four, four, three, four. And the other one was three, four, four, three, three, three, four, four, three, three. And I'm going to call this list land owners list. We choose the workflow automation Jobs mean vacant land. Remove it from that create list. Okay, so now what's happening is it's putting all of those sellers in this list. And we have I'm actually going to make these two lists the same name. I remember right here. I have lists. This is landowner's list. And this one, I'm going to change the name to buyer's list. So I have two lists now, Owner's list and a buyer's list. Okay. And if I open this up now, this is from an old I'm going to delete this right now because this is an old Lee that I was messing with before. Hold on once. All right. So now I have what I've got. I've got a phone number and I've got a campaign. And let that campaign right here. If I go to leads in box campaigns, it's called Florida Land sellers. And I have that phone number assigned to that campaign right there. And I also have two lists, a list of buyers and a list of sellers. Now I want to send direct mail campaign to these sellers. So I'm going to go here and let's pick a template to set. I'm going to go to templates, direct mail templates here. And let's say oops, let's say I want to send this neutral letter to real simple letter and here's the that stuff. Now, if you want to, you can modify this letter. If I go back here and it's this letter right here, neutral letter, you could click on this duplicate button and you could actually duplicate it, customize it, make it your own, change the background, a yellow if you want as well. But we're going to send that letter now to send direct mail out.

Joe: There's a few things we need to do. First is we're going to update a status. We're going to create a new status called direct mail sent on a certain date so we can see when that mail is sent. Now, this is something I want to share with you. It's a little more advanced. We're actually going to schedule three different packages of mail to go out. We're going to like 20 postcards that go to day 20. Postcards to go in a week and 20 postcards to go week after that. So bear with me here. Watch what I'm doing. I'm going to my workflow automation, Joe's main vacant land, and I'm going to open up this automation here. And I've got a bunch of statuses in here. I'm going to delete some of them because I just don't need them anymore. But here's the status called mail sent. We're going to put today's date on there January 20th. Okay. And I'm actually going to create I'm going to go to the bottom here. I'm going to add a new status and I'm going to scroll to the bottom here, says add customer status and I'm going to put a new date on there, 31. All right. And I'm going to do a new status scroll to the bottom, add custom status, and I think the next date would be six Feb, something like that. Right. Okay. Now I'm going to drag this guy down to the bottom here so they're together. All right, so I've got three statuses now and all statuses is like a label for that leave update work phone call. Now I'm going to go to mail sequences and I have a



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mail sequence already for that letter right here. Land sellers, neutral letter. So you could just go in here and edit this one, but I'm going to create a new one so you can see how to do it from new from scratch. I'm going to click on new mail sequence. I'm going to call this Letters to Land sellers. Now we call it Florida. This is a this is a letter that I'm using for all my Florida leads. And I'm to click on Add New Step. I'm a choose that neutral letter that I have in here. And it is right there. Okay. And I'm going to choose This is what it looks like right here. Preview. All right. And I'm going to choose the phone number that I want to go on those right there, Florida land sellers. And I'm going to do my return information here. Yep, that's my company. Let's just say. And I'm a delay the step zero days save. Now, by the way, I did this thing here, overwrite other steps because I'm going to show you what I'm doing here in a minute. But now this is I'm going to call this day one sequence update, mail sequence. I go back to my list of mail sequences here. Go to the bottom. There it is. I'm going to duplicate this one. We go to the bottom again. Now there's this one. I'm going to edit it and I want to call this day 7 a.m.. I go to this template I created before and I'm a delay this step by seven days of date mail sequence. Now, what I'm trying to show you is a way that you can automate and set up all of your marketing to happen just automatically for you in spite of you. And I'm going to duplicate this one now and go to the bottom, edit it, and this one's going to be called day 14 and we're going to delay this 114 days save. So now if I go to my mail sequences here, I go to the bottom. You can see I've got these three sequences that are sending the same letters, but they're sending them out staggered from now. Okay. So I want to go to my list of sellers, landowners right here. I'm going to click view all. I must sort this by reference ID.

Joe:

Now, how do you add columns? And this is a good question a lot of people ask, how do I So to do the columns that you want and this is what I like, I got my reference ID status, property address, county size, primary contact name, etc. And if you click on this, if you scroll all the way over, when you click on this gear icon, you can drag and drop column headers there. This is what I like to have here. So now I can sort it by reference ID, I'm just going to select 20 at a time. There's 20 selected out of 239 right now. I'm going to go to more actions and I'm going to update status and I'm going to choose that status I created for mail sent today. I'm going to clear selections and I'm going to go to page two and I must select the next 20 and I'm going to go to more actions update status. I would choose that one for the date on the 31st update status. I'm going to clear selections, go to page three, choose those 20 more actions, update status. Choose that status. February 6th, Boom. All right. So now if I go to my list for landowners in those two zip codes, you can see I have these three statuses. So let's go ahead and schedule that mail out by the mail sequences, the mail campaigns. So I might choose the first 1st January 24th. And when I select that status, there's 20 in here. So I'm choosing all choosing all 20. And I go to more actions and I'm going to go to send direct mail. I would choose that first sequence. It's all the way at the



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bottom. You can't see it, but there it is right there. And I'm just going to prove this is sending the mail day one. And I pauses while the preview opens up. All right. So I'm glad there was a little error in here because I want to show you how to fix this. You see how my signature is? Way down the bottom is weird. I'm going to fix. I must show you how to fix that right now. But is there anything else in here that might be weird? You can see that this trust. This is the name of the owner on record. It's pretty long, but that's just the way it is. Not a big deal. The reference ID shown up there, the phone number shown up there. Okay, this looks really good. Maybe I can add a space right there after the letter reference number to make it clean like that. So let's adjust the signature a little bit. Let's add a space. I'm going to close preview. I want to go back to settings. We have to go to templates, direct mail templates and neutral letter right here. And let's take this signature right here. I'm a drag it up a little bit. You know what? You don't even have to do a merge field. You could just put your name in here. You could just do Joe McCall, Dr. MBA, Nassau scientist, whatever you want. Okay. And let's do a little space right there. Save changes. Now, you notice I don't have to update all the mail sequences. I'm just updating the templates. I save changes to make double sure. Back back, back.

Joe:

And now let's go back. To my list. Go back to the landowners corps. I'm going to send mail to this first group here. January 24th. I'm going to select all have I go to more actions and I want to do send direct mail. Choose that sequence. It's at the bottom of my list here. Day one. Let's preview this one. Now, if this preview were to come up right away, it's going to bring up a cached image there. So sometimes it's a little frustrating, but you might have to do it in a new browser or do a log back out, come back in, because if the preview opens up right away, then it's again, it's bringing up an old image. But if it does it what it just did right now, which is good, then it's fine because now you can see the move, my signature up a little bit. Maybe I can move it up more. And it added a space right there. I am going to move it one more time because I'm just a little anal about those types of things. Templates. We're just going to move that signature up a little bit neutral. Let her scroll down and it looks weird. I'm putting it up here, right? But because there's merge fields and sometimes the fonts don't work and that shrinks a little bit and stuff like that, you have to move the spaces like that anyway, so that looks good. I'm sure it does sort of go back to templates here and go back to my list and you only have to do this one time. The first time you're doing this, go to January 24th. Let's select those 20 more actions. Send direct mail. I'm going to choose that sequence. Oops, that's the wrong one. Let's choose this one preview. We notice how came up quickly like that. And the signature didn't move was because it's a cached image. Sometimes you just have to wait a little bit or refresh the page, log back in, log back out, whatever. So if it's ready to go, you just click, I accept and you click send. There. It started. Now hold on one second. Never mind. I was going to stop the mail because I really don't want to send this, but I'll do that later. Now I'm going to go to the



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next one. January 31st right here. I'm going to select all 20 more actions, send direct mail. I mean, choose that sequence. Day seven right here. I accept sense of that mail is going to send be sent on January 31st and go back to my list here in the breadcrumbs. Go to February 6th, choose all 20 there more actions send direct mail. Choose that third mail sequence. Day 14 right there. I accept send. That's going to send mail on February 7th. You understand? So now if I go here to marketing direct mail, I went all the way down here. These are the sequences right here. And you can see these are pending and these are pending. Okay. And if I go back here to lists, go to this landowner's list. If I go to this first one here and let me just open up one of them randomly, you got a mail sequences, boom. You can see that is scheduled and as soon it'll be in transit and soon it'll be delivered. I'm going to go ahead and stop all of these. Now, let me just show you how to stop them so that in case you ever want to stop all of your mail. So I'm just going to click view all I know. No, let's do this. I'll just go to this. I'm going to choose this. I might choose all 20 in that status. Now I go to more actions and I'm going to go to stop direct mail all sequences. I'm just going to stop all though. So the mail stop. You could also go to I'm just going to view all of them here. I'm going to choose all 249 more actions. Stop direct mail. Okay. Now I'm only doing that because this is this demo campaign and I'm setting it up. But it's really easy to stop direct mail when before it goes out by doing these kinds of things. All right. Hold on. All right.

Joe:

Let's say it's been a week. We sent out some mail. Now the leads are starting to come in. What do you do with the leads when they come in and how do you send them an offer inside of freedom soft. So this is really important. I'm going to show you how to set this up so you can start sending offers to sellers and do automated follow up sequences with these sellers as you do it. And this is going to be more advanced stuff. I'm going to show you a way that you can maybe just send a one off offer or you can also set it up where you click it. Just change the status in a sense of an offer, and then it sends a whole year's worth of texts, emails and more direct mail to follow up with them until they finally do call you and either tell you, Hey, take me off your list or yeah, I'll sell my property and whatever they tell you, you can just as easily and quickly stop all of that follow up and automation from going out. Okay. So what I'm going to do now is I'm for my Google voice number. I'm going to call this campaign. We've got this campaign for land sellers and it's got this phone number right here. I'm going to call the number for my Google voice and leave a quick little message and do a text exchange. I'll text it some details or something. So, all right. Now, when you go into your freedom soft account, if you go into leads, leads, inbox, you're going to start seeing new leads in here. And if you click right here on your notifications, you'll see the activity that's going on. Now, there's two lines here, but it's from the same phone number and one is a voicemail, one is a text, but it's again coming from the same phone number. So what I want you to do is when you go into freedom Soft, just go right here to



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leads, go to Leads Inbox and just like a Gmail or an email inbox, you just go through these leads. So let's open this one here and you go to communications and you can see I left a voicemail, you can listen to it. And I actually even texted in C81008 is a reference ID from that postcard. Now you can go ahead and send a text back right here. The problem is I don't have my phone system set up in this demo account, so it's not going to let me send outbound text messages. Okay. But you could send and receive text messages here. I can still. Call this number right here. I can press this number. I can call it. And you'll hear an echo here in a minute. It's calling my phone here. Hello? Hello? Hello. Hello. Checking. Check. He went gold. Anyway, so you can actually talk to the sellers right here from Freedom Self. And I want to encourage you to make those phone calls from freedom soft, because it's going to keep a record of the whole conversation in here, right? If I refresh this page, you'll see here's the outbound call that I made, and in a minute you'll see the recording of that. Also, if you don't have it already, there is a Freedom soft app that you should get. It's free. It's included with your freedom soft subscription, and you can make and receive calls right here from the app and update leads right from here.

Joe:

So if I go to active conversations and not real small, it may be hard for you to see. Let's try this here. You can see the lead that just came in right there and you can update the lead in there and you can have the text conversation and see the history of the calls and everything in there from the app. And there's some things you can't do with the app, but it's a really good way to get notifications and to get calls from these leads that you're working on. Okay. So if I refresh this page again, this is processing the audio. In a minute you'll be able to listen to all your inbound and outbound calls. So it's really smart to have the history of all your conversation right inside of here. Okay. Now, first thing you need to do when the can you listen to that voicemail? There's two things you need to put the cell in the person's name right here. The guy's name is Joe. All right. And if this is a primary contact, this is the property address. I don't know the property address yet. I just know his name is Joe. He maybe he texted me. His name is Joe. And I don't know the property address yet or any information about the lot. I need to go find it in the list record, but this is really important. You need to click a yes. I have permission to contact them or permissions not required. So this every new lead that comes in, you want to confirm them with a green checkmark. So they are now confirmed in this. Does that make sense? This is really important. Don't forget this step. Confirm them now. Always update the status and the status is they want an offer. So they've requested an offer. There's a status here. Offer requested pending preliminary research. Okay. Now, if that status is too long, you just want to change it. Check this out. I'm going to go to Settings Workflow Automation, Joe's main vacant Land. Edit I'm going to go find that status right here. And let's just add delete. I just want it to be say offer requested and what happens when that status goes off? A requested look, it stops any other follow up and it stops any future direct mail sequences. Now I can



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restart it, but it's it just stops any kind of automation that's going on in the background. All right. So I'm going to update workflow here just because I updated that. And by the way, let me go back into that workflow automation and you see all these statuses down here, I can delete them and even though I delete them because it will not delete the status, the leads that already have those old statuses in there. So I just deleted those old ones, right? If I go back to lists landowners, those statuses are still there. I didn't delete them there, but they just delete them on my list of statuses for my new dropdown menu. That makes sense. Okay, so if I go back to my lead's inbox, we need to send Joe an offer and I can see here that the reference ID, by the way, there's I can listen to that message, that phone call. Okay. And so I know it's city 1008. So I'm I do a few things here because there's a property in the list that has an information and there's a lead in the campaign. There's a list in the campaigns. Right? So I'm going to actually go and copy that phone number right there. I'm going to copy the phone number and I'm going to remember, okay, let's see it, 1008. So I'm going to go to the list and I know it's Citrus County, and if you wanted to, you could view all and sort it by reference idea and then find City 1008. Okay. But I'm just going to do the advanced filter. I'm a click advanced filters. I'm I click here, add filter and type in the word. It's a long dropdown menu, right? You can see this long dropdown, but if you just start typing RDF, it takes you right to reference ID and I must say is 1008. And there's that property right there and you can see the status is mail sent. 24 Okay, I'm going to paste that phone number right there. Click save.

Joe:

Now there's a record in the list and a record in the campaign with the same phone number. I want to merge them because I want to bring over all the owners information here. The latitude longitude, the parcel ID, the acreage is, and all of that. Okay. So I'm just going to go right here to more actions and I'm going to go to Merge Records. That's finding similar records that have the same phone number in it. And there it is right there. I'm going to merge, click. Okay. Now the merge has been merged and the status is now this. You can see it's got it combined, the new name in the old name. So I'm just going to delete that there. This is a primary contact. Joe is the one who called me. Maybe he is Robert's son or something like that. But if I scroll down now, you can see the status is still often requested. It's tied to this pipeline, the campaign on the list. It's important. It's got to be combined to those, to the owners information right here. And then the GPS coordinates. All the information about the property is right here. That's awesome. Okay. And now if I wanted to, I can copy that. Go look it up on Google Maps and see the property there. Hopefully it's vacant. That's a vacant lot. Cool. And you can do your research and all that. Let's say now, by the way, you can click on this map view and see it here right from Freedom Soft. Okay. You can sometimes get to Google Street View right here. Boom. And sometimes you can get even comparable. Sales. Now it's harder to get comparable sales with land, but sometimes it works like right here, boom. But I recommend getting comps from Redfin and



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Zillow. Let's go back to the details here. I want to send this guy an offer. I've done my research. I decided I want to send him an offer for \$10,000. Now I'm going to walk through the steps on how to do this because I want you to learn how to do this yourself. So I'm going to send him an offer for 10,000, but I need to get the direct mail template in the mail sequence ready for this. So I'm going to go to my settings again and I'm a go to templates, direct mail templates, and I'm going go find the letter that I want to send. And here is a letter contract. Vacant land 90 days. Here's one with a power, a power of attorney. If you want to add a power of attorney, you can do that here. But let's open this one. Just look at it. This is the letter. It's got some merge fields in here. Hopefully they work. They may not work. And so I'm going to show you a minute how you can do in the merge fields in there if you wanted to. Signature. Looks like it's weird, but it'll probably be all right. Cool. 90 days. Now here's something. Look, the you might have where the expiration date has emerged field in there and you can always go in there and delete it. It used to be I had to type in the expiration date for the contract. Now I just changed it and the templates were just says it'll expire within 15 days from the date of this letter if you don't respond. Cool. Let's say I wanted to add in additional terms. I'm just going to do the dash there and I'm going to go here to seller variables. And there is a field called additional terms. If I just type in add, it brings it in. So if I have additional fields, that's where it's going to be. Save changes. Let me show you one more thing. This is a little advanced, but this is important to understand. If I go back here, if you're looking at this lead, for example, to the editor that leads inbox. All right.

Joe:

This is what I'm working on. All right. You can see these are all these fields in here. You can modify them, edit them, move them around and stuff like that. So how do you do that? You go here to settings and you go to Custom fields right here, seller leads. And here is where you can insert or add or move around. Different kinds of fields Make sense. Anything you like or don't like, you can go in here and edit it and change it, but every time you do, make sure you do save changes. All right. Let's go back to templates here. We're going to send an offer letter to the seller. It's really important that you always send offers in the mail to sellers, but I'm going to take This is template. Looks good. I'm going to go with it. Now I'm going to create a mail sequence for Florida because right now you have mail sequences in here and one of them is called a scroll down. I've been demoing this a little bit. Hold on one second. All right. Here it is. It's called land setter seller's letter and contract. So you're going to take this. There's no step involved in it right now. But I'm going to duplicate this because I want to make it unique for Florida. So I'm going to duplicate this one right here. Go and find it again. There it is. I'm going to edit it and I'm just going to delete the one B and I'm just going to call it Florida. Now, I might choose a step, which is now I go choose that template that I want to use and there's a bunch of them in here, but there it is right there. And I'm going to choose the campaign. I want that phone number in this letter here. And so



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I'm going to fill out these merge fields here real quick. I just filled in these fields. You only have to do this once and I'm going to say overwrite other steps with these attributes. Save update mail sequence. So now I just created a sequence where it only sends one thing to the sellers, and so I'm going to go back here to the mail sequence and I'm going to actually drag that up to the top so it makes it easier. There it is right there. I'm a drag it all the way up to the top so I can find it easy next time. So I'm going to go back to remember recent items is something I use a lot. So you can go to recent items to go back to the lead that you were just working on. That's a very important thing there. I'm ready to send this guy letter. But I need to put in what offer am I going to send him? So I'm gonna do 10,000 here and I just copy that. There's no outstanding taxes that I know of yet. 10,000. Now, I don't need a land offer expiration date anymore, do I? So I could go into custom fields and delete those fields because I changed the contract to say this contract expires in 15 days. So if I wanted to, I could go to Custom Fields and delete this one. And I don't use land closing date, do I? Because I just say closing will be within 90 days. That's what it says on the contract. Let's just leave that there. Also, I have later on, I'm going to show you a range postcard that I use in my step sequence of follow up. I have a postcard that says it just sends basically, hey, I can offer you between this and this if you're interested. So let's do that. 8012 thousand. I just that's going to go into additional terms to the range postcard that I'm going to I'll show you later, but I'm just putting that there. All right. So we'll just save this updated.

Joe: I'm ready to send this guy an offer. So I just go right here. Two more actions send direct mail and I'm a choose that sequence I created. It's right there at the top. Boom. I click preview, always preview it before you send it, and I'll pause this video while it comes up. All right, here we go. There's my reference, my contact information, the reference ID, the date seller's information right there. I know it's really small. I'll try to give me a little bit, but it's got the price there. Boom. Okay. Looks good. Here's a purchase agreement. I don't see any errors. Mistakes. Bring it in. The owner of record purchase price, ten grand. It's got 90 days closing. The expiration date is right there. Seller Within 15 days. If I had additional terms, it would fill in right there. Looks good. Is ready to go. Close preview. And I click, I accept and said, No, I'm not going to do that, obviously, right now. But then it's sent it's it'll go in a hit the seller's mailbox and within a week I'm going to do one other thing here. I'm going to download this letter and I'm just going to download it into my temp folder here. I'm to call it contract and I have another one and I'm just replacing it. So then I click, I accept and I click send and it sends that offer in the mail. Now there's a few things you need to do now you need to go here. It says change the status to offer number one sent. This is so important to understand. You have to keep your leads clean and updated so you always update the statuses to whatever happened next. If you called the guy and you left a voicemail, you change it to contact a temp one the next day. You contact attempt to the next day contacted temp three. If it's a cold lead, follow up, whatever you need to always



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update the status with these leads. It's important. Don't do these capitalize ones. Those are just the system statuses. Those are okay. It's not going to kill me. Break anything, but you want to use the statuses from the workflow, the Joe McCall signature edition workflow automations, and those are these statuses right here because things trigger in the background when you change it to those statuses. There are no automation statuses on these automations and these statuses up here. That makes sense. Really critical to understand that. So when I change it to offer number one sent and I refresh this page in the background, some things are happening and you can see right here, it's created some tasks to send them a voicemail and to send them an offer. It's going to say, Hey, send them a voicemail. I usually dial in a week and then send them another offer in 30 days when I just change the status here to offer number one sent. All it does is it creates I'll show you the minute where this works, but it creates some reminders. It doesn't send the offers for you. In a minute, I'm going to show you how you can have it. Send the offer every 30 days for you. It will also send some follow text messages and emails and stuff like that. But I'm going to go to right here.

Joe:

If I click mail sequences, you will see that letter that I just sent and you'll also see the postcard. You'll see the original piece of mail that was the postcard of the letter that was sent. And you'll see the contract that was sent. So you'll see those two right here, which is pretty cool. You can see that. But sometimes I like to go to attachments and just attach that contract that I downloaded. There it is right there. All right. There's a few things I want to show you with this. There's the contract I can click view and all right, now guess what you have up here. You have a really long URL that you can copy and actually text to that seller if you wanted to. I don't recommend doing this all the time, but if I wanted to, I could just click on their number, click esims and say, Joe, here is the contract we mailed you and paste that you URL right here and click send. Now the Met the text isn't going to send because I haven't set up my phone set up yet, but when that is set up it'll send that text and again, you can just take that URL and open it up in any browser and it pulls up the contract. Is that pretty cool? You can't actually text a PDF through Freedom Soft to somebody, so you can send that text out. The other thing you can do with this is you can email it to the seller. And so let's say you get the seller's email address. Okay, that's one of my junk emails. I can actually email this contract to them. All I do is I click, I can click email here or I can click email here. So I'm it, click on email here, and then I'm going to click on this attachment right here. It's attached the contract right down there, and I can type whatever I want. Now there are email templates. Let me show you real quick. If I go to settings templates, email templates, there's a bunch of really good email templates in here that you could use for land. And right here let's create one for land. So I'm going to update this. This needs to be update a little bit, so I'm going to fix this. I won't because this is a mistake right here. Okay. And County State, I'm going to copy that and off. Okay. This will



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be Citrus County. This will just be Florida. Okay. And if I had a fax, if I don't have a fax, just delete that sentence there. Okay. And this phone number here will be whatever the phone number was. I think it was 813 something. Okay. And cool. That's a good template. Save changes, return to templates. All right. So that's email templates. It's called land offer. Email Florida if I want to duplicate it and do another one for Oregon, just duplicate it. Go here, call this Oregon. Right. And you'd put a different phone number there for your Oregon leads. Okay, Save changes. Let me just make sure I got this one correct. I may just make sure I saved changes. Okay, cool. You can always go in here too. I see some really old ones I used to use for sale by owners on Zillow. If you don't want them in there, you can just delete them. All right, Now let's go back to delete. I mean, go to recent items. Let me I here right here in this tab, I want to email Joe this contract, so I'm going to click on his email. I'm going to open up that attachment attach right there and I'm going to go to this envelope and go find that email that says Land offer. Email Florida right there. And boom, it just merged all of the fields. And you can choose the email that is coming from. If you have multiple emails in here and you click, I always do send copy to me and send email. It just sent that email to that. Contract to the seller. The other thing you can do in here if you want, is you can do a digital signature. So right here, we're in the lead again. We go to attachments. You can go here to sign and you can put in their name right here, Joe McCall at hotmail.com, and if you wanted to, you could put yourself in there as well and add assigner. Billy Bob. I'm not going to do a real email because I don't want to add. And he could change the order. Okay. The seller always signs first and then I sign it. Opps. I mean, delete that. Okay. The files in there are going to go to next step, prepare documents. This is where you're going to drag and drop the signature. So I'm a drag. The seller signatures right there. Choose Joe McCall's. The seller dragged us to where it's just like that and the date I'm going to just put right down there. And that's going to be Joe McCall's date. I put it right there. And then the signature, the printed name will be a textbox, put it right there and choose John McCain and drag this to where it's on top of the line. Okay. And now I'm going to drag the signature for this field over here. This is going to be Billy Bob. I'm confused now. And all of the names that I used, who's Billy Bob and who is Joe McCall? And I know I can do it like that. And you just play with this and. Okay, so we've got the merge fields in here. Looks good. You click right here, you review it and send it. You can title it contract. They call me when you get this. If I am doing or Billy Bob, whoever I want, choose Billy Bob.

Joe:

So like this is the email you send. And when I'm sending electronic signatures, whether I'm using freedom soft or DocuSign however I want to do it, walks the seller with it through them, with it over the phone, and then you just click send document right here and it goes out. Now, this document signing thing is right here. If you click on this little icon, you see it here, you can see the status out for signatures, you can edit, resend, you can remind signers here, you can cancel it. I'm going to go ahead and cancel it. But then when they sign



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it, it'll actually show up in that lead record. I go to recent items. I think it's this guy right here, isn't it? Nope. Let's just go Leads inbox boom. You'll see in attachments here when they sign it. The original one and then the document when it was signed And the whole audit trail it's called, will be here in attachments when they sign it electronically, which is really powerful. So I just showed you how, number one, you can send the contract in the mail to the seller. Number two, you can text it to the seller by getting the URL right here. Right. And number three, oops. So celebrate and you can email it to them. And number four, you can do electronic signature, all four right here inside of Freedom Soft. All right. Now, the important thing is to know these tasks. This is really critical. Every lead when you're working these leads, number one, need to update the status. And number two, you want to make sure there are tasks assigned to you or somebody in the future to follow up with this lead. We operate under no lead left behind, so every lead has to have a task assigned to the future. You can create it manually, just click, create task, follow up, whatever, assign it to your VA yourself. Do it in on a month from now and even add send a reminder at a time, whatever same task. Then that will come up. Now when you log in to Freedom Soft, here are all of your old tasks. I've got some duplicates here. Let me just delete some of them. But here's your upcoming tasks. And right here too. And this little button here, you see all of your tasks for all of your deals. And so you can sort this by do date here. The oldest ones are up here. You just click on this. If there's the task, you go to the lead right here and this is the lead that you need to be working on. That makes sense.

Joe:

Okay, Now, I got one more thing I want to show you. I want to show you how to set this up where you can do automated follow up. All you have to do is change the status and it triggers a year's worth of automated follow up, which is really amazing and cool. You don't have to do this, but it's really awesome. So let's go to Settings and let's just do it for maybe six months. Okay, I'm going to go to workflow automation. First of all, you know what? Let's do mail sequences I have here. The sequence that I have already done. It's called Land Automated Offer Sequence. Lee County Florida let's just look at the steps here. Now, you're going to get something similar to this. Okay. But this is good. So in your freedom soft account, if you have if you just bought a recently, you're going to see a sequence in yours called something like land automated offer sequence or land blind offer sequence or something like that. Just to personalize it, make it your own, just go in, copy it, duplicate it and make it your own. So this one here, it's there's eight steps involved. I'm actually going to edit this up, edit it, and I'm going to change it to just Florida. This is an automated office sequence and this is the stuff it sends. Now, let me just actually real build a build a simple one real quick from scratch. So I'm going to click new mail sequence. We're going to call this automated spelling it wrong demo new step. First thing we're going to send is that contract, that one page contract, which is right there. And I'm going to fill out this information real quick. You only do this one. Okay. All right. This is delayed. Step zero. I'm



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sending this letter. But I need to pick a phone number so I can choose the phone number I want on all of these safe. That's happening immediately. Now, I'm going to add a new step and I'm going to send a postcard, some kind of handwritten postcard that says, hey, did you get. The thing that I said, and here it is. I think this is it. Now, here it is right here. And it's going to add that letter to it that a phone number from that campaign. And I'm going to delay this step for 15 days. I was 14 let's keep it a week. All right. And it basically this is a postcard. This is hey, just following up on my cash offer. If you didn't get it, no problem. Call me. I'll send it again safe. So now immediately, we're sending the contract, and then we're sending a postcard two weeks later. Now, you might be like Joe, but what did they call me? I don't want to send them another postcard. If they call you, you can set up a workflow automation when you change the lead. Remember, we did this before. When you change the lead to offer requested, it stops any future mail that's going out or if you change it to dead or if you change it to active lead, it will stop any other feature mail that's going out. And so then you can set up another one, add new step. Let's send the offer again. Let's send the same offer all over again. And this one. And then we're going to delay this step 30 days. I've got the same phone number on there. So we're sending this day one, we're sending this postcard day, week two, and then day 30, we're sending this. And let's just send the same thing again.

Joe:

This is what I do and what I recommend you do as well. All right. Immediately, two weeks, 30 days, 60 days, and then let's change it up. Maybe the next time is we do that range postcard I was telling you about. Let me find that real quick. Here it is, this range postcard. And we're going to send that day 90 and then let's send on day 120. Let's send a I have these blind offers letter. So it's a common it's like a it's just a one page letter and offer on one page. And it also gives them an option to counteroffer if they want to return it to me. Cool. I had a fax in there. If you want to, you can change. You can remove the facts from the master template. All right? And then after that, I could send. I have another blind offer. Let's send that blind offer. Number two, which looks like this. They can counteroffer right here. Pretty nice, All right, I got to put my email on there. I have email in two different places. Let me just copy this and return info. Boom. Good. Save, update mail sequence. Now, this is I don't know how many months, but let's do the postcards. Just some generic postcards. How about this third notice a postcard right there. I love that postcard. 180 days. Say, let's do a new step. Let's send my to do. Or is it? Here it is. My final note is postcard. All right. So this isn't a good example because it's got a it's looking for a merge for a phone number. I need to delete that phone number from this postcard. But anyway, boom. My point is we're setting up these mail sequences. So once I change the status to something, it's going to trigger and send all of this stuff I can stop at any time. It's really easy to stop it, but I click update mail sequence, we're good to go. So that was my demo. I just wanted to show you our mail sequence. Now how do I initiate that? All of that stuff to



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follow. We're going to be creating a status workflow automation. Go to your workflow automation right here, click at it. And we have one here already called Initiate Automated Offer sequence. And you should see this, but if you don't, you can automatically, easily create it yourself. You go right here to add status set, click on this dropdown, go to add custom status and you can see it called Initiate Offer Sequence. And this is my demo. And then from here you add actions and so I want to immediately send direct mail. I click on send direct mail, and I'm a choose that sequence. I just created this right there, the weird automated demo thing, and it sends all of these things I accept add actions. So immediately when you change the status to that, it'll send the direct mail and then I want to send a text. All right. Hi. Seller name. Did you get my offer? Joe? You sign it to you and I do not do opt out text. You can if you want, but I don't include opt out text and that's great. Now I'm going to delay this nine days and I'm just going to copy that ad action because sometimes if if you put in a word that will flag the spam filters, it'll alert you. I'm also going to do an email, add email, subject your vacant lot question mark. It's coming from me. If I just paste that text I sent right there, that's it. And I'm going to delay this action also by nine days at action. Cool. I'm going to do the same thing again on day 39, 30 days later. Had it stacked, right? I mean that. Cancel that right there. Well you know action that SMS paste that there, assign it to me Well the numbers don't include opt out text and this is now going to be 39 days by the way DNC known litigators that's only will do it if you have done Freedom Soft skip tracing if you have done skip tracing and freedom soft, so don't worry about that. Add action.

Joe: All right. Now we're gonna do an email day 39 at email. Choose a user your vacant lot. All right. And whatever I said 39 that action I do the same thing now for day 69, day 99, whatever. So it's now sending a email and a text. Hey, do you got my offer? Maybe you want to change it. Maybe the next one is, Hey, do you still want to sell your lot? I'm following up on that offer I sent you. Do you still have any land that you want to sell? You can change all of that update workflow. All right, so now when I go to that lead and let's say I haven't sent them an offer yet. And I've written down in here. Okay. I want to set him an offer for ten grand. And a mid range postcard is going to be 8 to 12 grand. I just want to set the offer and all of the follow up and not have to worry about it or think about it again until or unless he calls me. I go, two more actions I'm sorry, status. And I'm going to go to the status right down here. Well, and just like that, all of that automation is happened. It's in the background. It's sending the offer right now and it's going to be sending a text and an email in nine days. It's going to send a handwritten postcard and the mail and the text and the emails and the mail and the texts and the emails. Bam, come on. And I don't have to go in and create any tasks to remind me to follow up. It's just doing it for me. Now, if I refresh this page, you'll see I have mail sequences in here and it has all of these things that are scheduled January 24th, February 7th, February 23rd, February, March 25th, April 8:00. I'm



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going to go ahead and stop this right now because I don't want to actually send it by. Just click, stop and are you sure. Yep. Boom. It's all stopped and I can go in here. I don't need these tasks because it's just going to do that follow up for me. This is it's an insane. And then let's say they call you in 3 or 4 months. Okay, You can actually go here to mail sequence and you can see the mail that was sent and that was received when they received it. And what you can see the initial piece of the postcard that you sent or the letter that you sent initially to get them to call you. And then you can see a history of all of the other direct mail that you've sent this range postcard, which looks goofy because the merge fields are so big. But you can see all of that here. Now let's say they call you and say, Take me off your list. I don't want to sell. Or they say, I do want to sell. Let's talk numbers. Let's go back here to workflow automation, Joe's main vacant land right here. And let's say they request an offer. They call you and say, Yeah, I'm interested. When they call you, it'll show up as the when they call you, your leads inbox will show up in bold and gray as a new communication. And when you click in here, you'll go do communications. They texted your call you and it says, Hey, call me and you call in or whatever. So now they've requested an offer when the status is requested. Offer offering. Look at this. There's an action to stop any more future automated direct mail or text an email. Follow it. Just like that. Let's say they say take me off your list, change it to dead DNC. It adds a number to the do not call list. It stops any future text direct mail and it deletes any incomplete tasks. Is that cool? So you can automatically and quickly stop another 20 letters from going out just by creating a status called offer requested. And then it stops. That future follow up makes sense. You can even have it where it's needs review. It stops the follow up. If it's a cold lead you just want to change it to called, it stops the follow up and then you manually create tasks to follow up or you can set it where it adds a task every 90 days.

Joe:

This is the real power. I hope you're getting this because this is insane. How much follow up now you can do it and just set it and forget it. It's crazy. It'll blow your socks off. So I hope you get some value out of this. Now I want to talk about. Hold on one second. Then we open up another window here. Some of you have been watching this to be like, my gosh, this is amazing. This is awesome. I love it. But I have no idea where to even start. You went way too fast. I'm completely overwhelmed and confused and you just want somebody to help you and do this for you. Some of you are watching this right now. You're already sign up for my apprentice program. We're already working together. That's great. You can hop off this video right now if you want, but some of you are like, I want to work with you, Joe, can you set this up for me? I know I already have the freedom soft stuff, but the more the extra customization, the extra things that you're doing in here. Can you just set it up for me? In fact, better yet, could you just give me a VA that can help me do all of this freedom soft stuff? And how about this? What if I just did the marketing for you and gave you leads? I was looking for apprentices. I want to actually start going into new markets and doing



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more deals. And so I've got this program I call my apprentice program where it's not coaching, it's not mentoring, it's let's do some deals together. If you're ready to get started and you've got some money to invest in the marketing, I'm going to set it all up for you and run it for you and help you hold your hand to do deals. And we will split the profits. In fact, get this, you only pay me out of the deals. Now there is a deposit required, but you get that back out of the profits from the first 2 or 3 deals that we do together. Okay. And we don't split the profits until after you get all of your deposit back. So I'm calling this my land apprentice program. I've got a mind map here that tells all about it. There is also a place where you can go to get more information. If you just go to Joe mccall.com/apprentice, Joe mccall.com/apprentice. There's a video of me walking through this mind map and how to apply the information, who it's for, who it's not for. This is what I have. This is what I'll do for you. This is pretty insane because nobody else that I know. Hold on one second. If there's nobody else does this, I work with a very small select group of apprentices, and I'm going to set up your business, give you business in a box, help you with the automation, give you the VA's, give you the leads, give you the funds for your deals. I just want somebody that I can do more deals with. So I teach this and I short. I make it sound easy, but it's frankly, there's a lot of work involved. There's a lot of stuff going on. And if you just want press button easy, let's just get this set up and let's work together.

Joe:

I want to encourage you to check out my apprentice program. It's very simple. Go to Joe McCall.com/apprentice. Watch the video of me talking about it there. There's an application button on there and we will get you going. Also, one more thing with my apprentices. You get me. I don't outsource my coaching to some third party sales force every weekday morning at 8:30 a.m. Central Time, I hop on with all my apprentices and we review deals for 30 minutes to an hour. Every weekday morning we go in and we look at deals that you're working on. I show you, Hey, this, let's offer this. Maybe it's a cash offer. And they said, no, but it's such a good deal. Let's offer them a creative financing offer. Then once you get a deal under contract, let's talk about how to partner on it, how to sell it, how to make money out of the deal, stuff like that. So also you get access to my cell phone and we can talk about deals. So this isn't coaching or mentoring. There is some of that involved, but it's basically a system set up. I'm going to give it to you and I'm actually just going to give you leads instead of anything up for you, give you leads and work with you one on one so we can do some deals together. There is a deposit required because I don't want to do all this work and set up all this stuff, give you all these leads with my own money and then left. I'm left holding the bag if you just quit and leave. So I want to set this up where we are working closely together, and then I give you that deposit back out of the profits in the deal. And we don't split profits until after you get all of that deposit back. So if you want more information, go to John mccall.com/apprentice. Somewhere on this page or below this video or whatever in the description will be the link. But if you go to Joe



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mccall.com/apprentice, you'll be sent to a page that looks like this a video of me talking about all the details and then a button to apply when you apply. We'll get on the phone, we'll talk to you, see if we're a good fit or not, and that's it. So I look forward to working with you. I hope this was helpful and I appreciate you all. See you. Take care. Bye bye.