

# DM to Deal Flow: The Ultimate Messaging Strategy Guide

For Mortgage Agents & Real Estate Professionals

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## Why DMs Matter More Than Ever

In today's market, people don't always fill out a form or call you right away. They react to stories. They like posts. They send emojis. And that's where most agents drop the ball.

But here's the truth: every "hey!" could be the start of a deal. Direct messages are **low-pressure, high-potential spaces** for authentic connection. Done right, your DMs become one of your strongest lead-gen tools—without sounding pushy or robotic.

Let's turn your inbox into a business pipeline.

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## Scripts for Every Stage of the DM Funnel

### 1. Cold Introduction

**Goal:** Spark interest with authenticity

Examples:

- *"Hey [Name], I saw your comment on our post about first-time buyers. Let me know if you ever have questions—happy to help."*
- *"Appreciate you reacting to that story! Are you in the market now, or just browsing?"*

### 2. Small Talk → Value Shift

**Goal:** Keep it casual, then offer value

Examples:

- *"I totally get that, the market is wild lately! If you ever want a breakdown of how it affects your buying power, just say the word."*
- *"Love that you're thinking ahead. Want me to send you a quick home buyer checklist to help map things out?"*

### 3. Qualifying Questions

**Goal:** Understand their situation

Examples:

- *"Out of curiosity, are you looking to buy in the next 6 months or more long-term?"*
- *"Are you currently working with anyone, or just starting to explore?"*

### 4. Offer a Free Call or Link (No Pressure)

**Goal:** Invite, don't push

Examples:

- *"No pressure at all, but if you ever want to talk it through, I offer free 15-min consults to help you game-plan next steps."*
- *"If you're curious what you qualify for, I can send over a quick link that gives you a ballpark in under 2 mins. Up to you!"*

### 5. Soft Follow-Up for Ghosted Messages

**Goal:** Reignite the conversation without guilt

Examples:

- *"Hey [Name], totally get it if the timing wasn't right. Just circling back in case you still had questions or wanted to chat!"*
  - *"Not sure if you saw my last message—just here if/when you need anything! I won't message again until you do, I know not everyone wants follow ups"*
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## Common Scenarios + Customizable Templates

### “Just Browsing” Replies

- *\*"Awesome! Browsing is the first step. Let me know if you ever want tips to make the most of it—happy to share what to look for (and what to avoid)."*

### “I Already Have a Broker” Objections

- *"Totally respect that! Just know I'm always here as a second opinion if you ever need one. Your mortgage should work for you, not the lender."*

### People Who Engage But Never Reply

- *"Appreciate the love on our latest post! Feel free to reach out if you're actively exploring home options (or not) —no pressure either way."*

### Warm Leads Who Go Cold

- *"Just wanted to check in and see how things are going. If you've hit a wall or changed direction, I totally get it—still here whenever you need a sounding board."*
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## When to Transition Out of DMs

### Best Timing & Phrasing

- When they ask specific questions
- When they mention timelines or goals
- When they engage consistently over a few messages

### Examples:

- *"Sounds like you've got a good handle on things. Want to hop on a quick call to make sure you're on the right track?"*
- *"That's a great question—I can explain that better in a quick 10-min chat if you're open to it."*

### Signs They're Not Ready

- One-word replies
- No questions or engagement
- Vague answers with no follow-through

Let it breathe, circle back later. Respect > pressure.

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## No CRM? No Problem.

### Tagging System (Instagram)

- Use saved replies like "Lead - Warm," "Lead - Cold," "Follow Up Needed"
- Add Notes in DM search (e.g. "buyer - 6mo")

### Reminders to Follow Up

- Use calendar or IG saved reply + date
- Example: "Hey [Name] – just circling back like we planned last month!"

### Google Sheet Tracker Format Template:

Name	Platform	Date Last Replied	Stage	Notes
Sarah	IG	June 5	Browsing	Interested in pre-approval

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## ✨ Bonus Tips

### Voice Notes vs. Text

- Voice = personal, great for warm leads
- Text = scalable, better for cold outreach

### Emojis: When They Help

- Add tone and warmth — ✨🏡😊
- Avoid overload — no emoji sandwiches

### How to NOT Sound Like a Bot

- Use their name
- Respond to what *they* said
- Keep it casual: contractions, short sentences, even typos are okay

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## Final Word

Every deal starts with a conversation. And the best conversations don't start with sales—they start with service.

So show up. Stay consistent. Be a resource.

You never know when that "hey!" becomes a handshake.

It's time. Get a Better Lead Flow.

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