

REAL ESTATE CRM SETUP GUIDE

01.

Choose the Right CRM

- Identify needs: Lead management, automation, integrations
- Top CRMs: Follow Up Boss, LionDesk, HubSpot, KVCore, Top Producer



02.

Import & Organize Contacts

- Gather & segment leads (New, Current, Past Clients, Advocates, SOI)
- Tag contacts for personalized communication

03.

Automate Lead Follow-Up

- Set up workflows for leads, clients & referrals
- Automate emails, texts & follow-up reminders



04.

Lead Routing & Notifications

- Assign leads automatically by source, location, agent availability
- Enable instant alerts for new leads & follow-ups

05.

Track & Optimize Performance

- Monitor conversion rates, engagement, follow-up completion
- Adjust workflows based on CRM insights



06.

Maintain & Grow Database

- Update & clean contacts regularly
- Integrate with landing pages, social media ads, website forms



LEAD NURTURING BLUEPRINT

Nurture. Engage. Convert.

Why Lead Nurturing Matters



Builds trust & credibility

Keeps you top of mind



Boosts conversion & referrals

3-Phase Lead Nurturing Approach



Awareness (Ongoing, Weekly) –

Build brand authority

- Social media, blogs, market updates, newsletters



Consideration (1-3 Months, Bi-Weekly) –

Educate & engage

- Email series, case studies, lead magnets, webinars



Decision (2-4 Weeks, Weekly) –

Convert & close

- Personalized follow-ups, special offers, virtual tours

60-Touch Follow-Up Plan (12 Months)

24

Emails – Market updates, property alerts

12

Calls – Check-ins & inquiries

6

Direct Mail – Postcards, holiday cards

12

Social Media Touches – DMs, comments, shoutouts

6

Events – Webinars, client appreciation

Create Your Blueprint

- 1 Segment Database** – Buyers, sellers, past clients, advocates
- 2 Personalize Content** – Address specific pain points
- 3 Automate Follow-Ups** – Use CRM & smart plans
- 4 Measure & Optimize** – Track engagement & refine