

A follow-up playbook for estate agents

Processes to help you sell faster

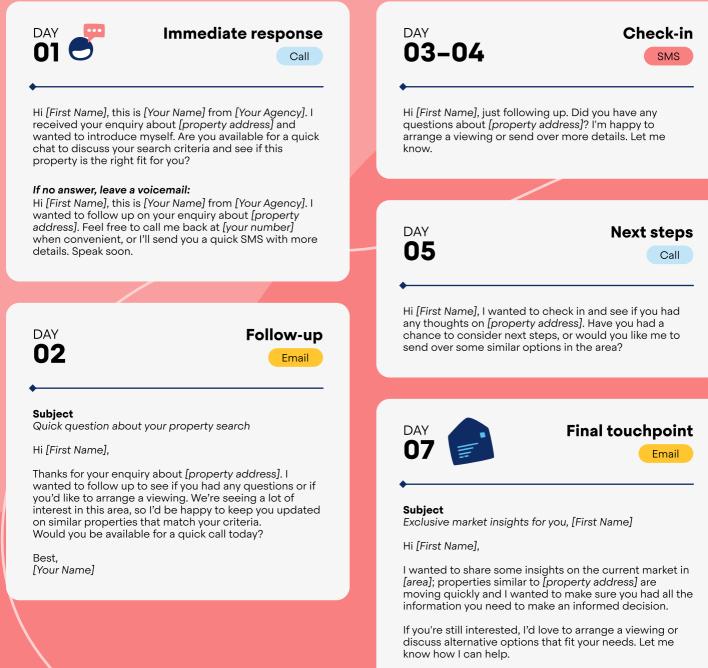


Hot Leads 7-day process

• Ready to act within 30 days

- Recently enquired about a property
- · Have pre-approval for a mortgage or cash ready
- Respond quickly to communications
- Express urgency or specific intent

By categorising leads correctly, you can ensure your follow-ups are focused on the most promising prospects, saving time and improving conversions.



Best, [Your Name]

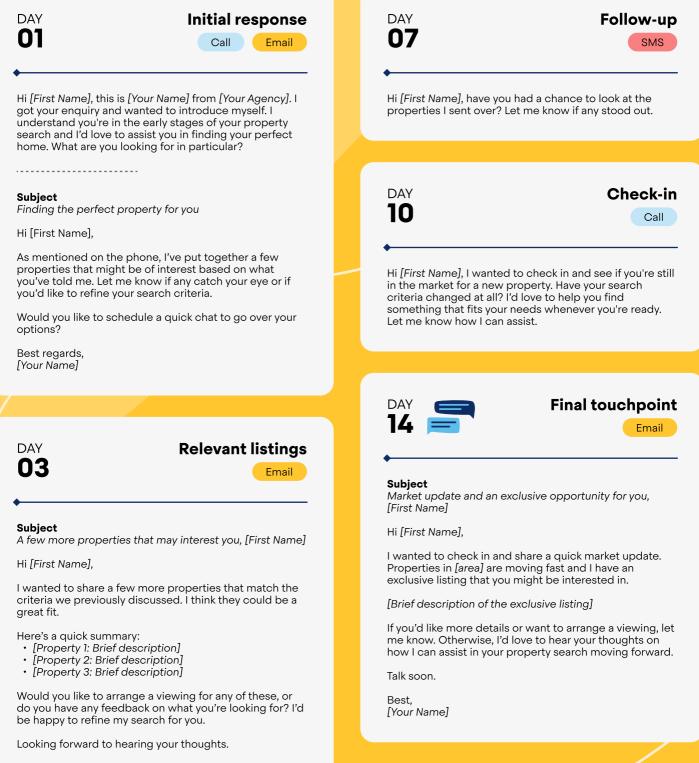


Warm Leads

• Ready to act within 3-6 months

- Browsing the market but not in a rush
- Engaged in conversations but hesitant to commit
- Need additional nurturing with relevant
 properties and market insights

By categorising leads correctly, you can ensure your follow-ups are focused on the most promising prospects, saving time and improving conversions.



Best, [Your Name]



The Follow-up Playbook

Cold Leads 30-day process

- Long-term prospects or low intent
- Browsing with no clear timeline
- Unresponsive to initial follow-ups
- Express interest but not ready to act soon

By categorising leads correctly, you can ensure your follow-ups are focused on the most promising prospects, saving time and improving conversions.





Email

Follow-up

SMS

Email

Subject

Helpful insights for your property search

Hi [First Name],

I hope you're well. I know you're still in the early stages of your property search, so I wanted to share some helpful insights to make the process easier.

[Insert link to a relevant blog post, market guide, or buying/selling tips].

If you ever have any questions about the market or want to discuss your plans, I'm happy to help. No pressure, just here when you need me.

Best regards, [Your Name]



Hi [First Name], just checking in to see if you found the property insights, I sent helpful. Let me know if you have any questions or if you'd like me to refine your search. – [Your Name]

Subject

Any thoughts on your property plans, [First Name]?

Hi [First Name],

I wanted to follow up to see if you found the property insights, I sent last week helpful. Have your plans changed at all, or is there anything I can do to help?

I'm happy to refine property recommendations or provide market updates whenever you're ready. Just let me know how I can assist.

Best, [Your Name]



Market update

Email



Latest market insights for [Location]

Hi [First Name],

I wanted to send you a quick update on the property market in [Location]. Recently, we've seen [insert relevant trend, such as price changes, demand shifts, mortgage rate updates], which could be useful as you plan your next move.

If you're interested, I can share properties that fit your criteria or give you a better idea of what's available within your budget. Let me know if you'd like me to send over some details.

Best, [Your Name]



Final touchpoint

Hi [First Name], this is [Your Name] from [Your Agency]. I hope you're well. I know we last spoke a little while ago when you were exploring the market. I just wanted to check in and see if your property search is still on your radar or if anything has changed for you.

If they're still looking:

That's great to hear. Are you still searching for the same type of property, or have your preferences changed? I'd be happy to help refine your search and make sure you're receiving the right options.

If they're no longer looking:

Thanks for letting me know. If things change in the future, I'd be happy to assist. Would you like me to keep you updated on key market changes?



How to master your follow-ups without losing the personal touch

1. USE AUTOMATION

- Automate your follow-up processes based on lead category
- Schedule emails and SMS messages to go out at optimal times
- Track engagement and adjust follow-ups accordingly
- Set up drip campaigns to nurture cold and warm leads over time, ensuring lead is forgotten



2. PERSONALISE AT SCALE

- Use dynamic fields to personalise messages such as first name and property details
- Segment leads based on behaviour (active openers vs. unresponsive leads)
- Leverage automated prompts to follow up manually when a lead reaches a certain engagement threshold

3. ADD A HUMAN TOUCH

- Use automated reminders to prompt manual calls at key moments
- Send voice notes or video messages for a more personalised approach
- Adjust messaging based on previous interactions rather than a one-size-fits-all approach



4. LEVERAGE REX CRM'S ADVANCED FEATURES



Lead scoring

Automatically rank leads based on engagement, helping agents focus on the most promising prospects

Integration with portals

Seamlessly sync enquiries from Rightmove, Zoopla and other portals for immediate follow-up

Task management

Automate follow-up reminders, so no opportunity slips through the cracks

Email & SMS tracking

See when a lead opens emails or clicks on links, allowing for strategic and well-timed follow-ups

Want to see how Rex CRM can help you streamline your follow-ups? **Book a demo today** at www.rexsoftware.co.uk/demo



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