



# 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.

DAY

01



## Immediate response

Call

Hi *[First Name]*, this is *[Your Name]* from *[Your Agency]*. I received your enquiry about *[property address]* and wanted to introduce myself. Are you available for a quick chat to discuss your search criteria and see if this property is the right fit for you?

### If no answer, leave a voicemail:

Hi *[First Name]*, this is *[Your Name]* from *[Your Agency]*. I wanted to follow up on your enquiry about *[property address]*. Feel free to call me back at *[your number]* when convenient, or I'll send you a quick SMS with more details. Speak soon.

DAY

02

## Follow-up

Email

### Subject

Quick question about your property search

Hi *[First Name]*,

Thanks for your enquiry about *[property address]*. I wanted to follow up to see if you had any questions or if you'd like to arrange a viewing. We're seeing a lot of interest in this area, so I'd be happy to keep you updated on similar properties that match your criteria. Would you be available for a quick call today?

Best,  
*[Your Name]*

DAY

03-04

## Check-in

SMS

Hi *[First Name]*, just following up. Did you have any questions about *[property address]*? I'm happy to arrange a viewing or send over more details. Let me know.

DAY

05

## Next steps

Call

Hi *[First Name]*, I wanted to check in and see if you had any thoughts on *[property address]*. Have you had a chance to consider next steps, or would you like me to send over some similar options in the area?

DAY

07



## Final touchpoint

Email

### Subject

Exclusive market insights for you, *[First Name]*

Hi *[First Name]*,

I wanted to share some insights on the current market in *[area]*; properties similar to *[property address]* are moving quickly and I wanted to make sure you had all the information you need to make an informed decision.

If you're still interested, I'd love to arrange a viewing or discuss alternative options that fit your needs. Let me know how I can help.

Best,  
*[Your Name]*



# Warm Leads

14-day process

- 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.

DAY

01

## Initial response

Call

Email

Hi *[First Name]*, this is *[Your Name]* from *[Your Agency]*. I got your enquiry and wanted to introduce myself. I understand you're in the early stages of your property search and I'd love to assist you in finding your perfect home. What are you looking for in particular?

### Subject

*Finding the perfect property for you*

Hi *[First Name]*,

As mentioned on the phone, I've put together a few properties that might be of interest based on what you've told me. Let me know if any catch your eye or if you'd like to refine your search criteria.

Would you like to schedule a quick chat to go over your options?

Best regards,  
*[Your Name]*

DAY

03

## Relevant listings

Email

### Subject

*A few more properties that may interest you, [First Name]*

Hi *[First Name]*,

I wanted to share a few more properties that match the criteria we previously discussed. I think they could be a great fit.

Here's a quick summary:

- *[Property 1: Brief description]*
- *[Property 2: Brief description]*
- *[Property 3: Brief description]*

Would you like to arrange a viewing for any of these, or do you have any feedback on what you're looking for? I'd be happy to refine my search for you.

Looking forward to hearing your thoughts.

Best,  
*[Your Name]*

DAY

07

## Follow-up

SMS

Hi *[First Name]*, have you had a chance to look at the properties I sent over? Let me know if any stood out.

DAY

10

## Check-in

Call

Hi *[First Name]*, I wanted to check in and see if you're still in the market for a new property. Have your search criteria changed at all? I'd love to help you find something that fits your needs whenever you're ready. Let me know how I can assist.

DAY

14

## Final touchpoint

Email

### Subject

*Market update and an exclusive opportunity for you, [First Name]*

Hi *[First Name]*,

I wanted to check in and share a quick market update. Properties in *[area]* are moving fast and I have an exclusive listing that you might be interested in.

*[Brief description of the exclusive listing]*

If you'd like more details or want to arrange a viewing, let me know. Otherwise, I'd love to hear your thoughts on how I can assist in your property search moving forward.

Talk soon.

Best,  
*[Your Name]*

# 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.

DAY  
01



## Introduction

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]

DAY  
07



## Follow-up

SMS

Email

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]

DAY  
15

## Market update

Email

### Subject

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]

DAY  
30

## Final touchpoint

Call

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

Rex CRM platform makes it easy to automate and optimise your follow-up process, ensuring every lead is nurtured.

## 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

## 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

## 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

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

## 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