rex

# Lead Qualification Checklist for Estate Agents

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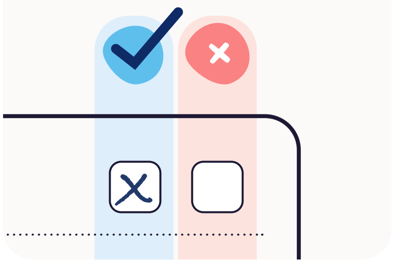
# Introduction

**Converting leads into loyal clients is the lifeblood of any estate agency. But not all leads are created equal. To maximise efficiency and profitability, it's essential to identify high-priority leads and track interactions effectively. This checklist is designed to help estate agents focus on leads with the greatest potential and stay organised, even if you don't currently have a dedicated CRM system in place.**

# Using this checklist

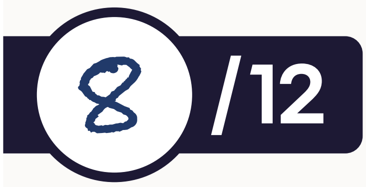
### 1 CHECK

Review each question and mark whether you/your estate agency implements this.



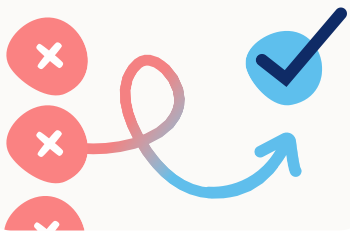
### 2 REVIEW

Tally up your score and see how you/your estate agency stacks up.




### 3 IMPLEMENT

Collate all of the areas which you currently don't do. Try implementing them, test and monitor results.



Part 1

# Criteria for identifying high-priority leads

## Use these questions and criteria to assess lead quality:

Select ✓ or ✗ if you/your team perform this action with each lead.

### 1 LEAD MOTIVATION

| | ✓ | ✗ |
|---|---|---|
| **Is the lead looking to buy, sell or rent a property soon?** (e.g., within the next 3-6 months) | ☐ | ☐ |
| **Have they expressed urgency or a specific timeline?** | ☐ | ☐ |

### 2 BUDGET ALIGNMENT

| | ✓ | ✗ |
|---|---|---|
| **Does the lead have a clear understanding of their budget?** | ☐ | ☐ |
| **Does their budget align with the market and your agency's portfolio?** | ☐ | ☐ |

### 3 PROPERTY PREFERENCES

| | ✓ | ✗ |
|---|---|---|
| **Has the lead provided detailed preferences, such as property type, location and size?** | ☐ | ☐ |
| **Do their preferences match the properties you can offer?** | ☐ | ☐ |

### 4 ENGAGEMENT LEVEL

| | ✓ | ✗ |
|---|---|---|
| **How responsive is the lead to calls, emails or property recommendations?** | ☐ | ☐ |
| **Have they actively engaged with your website, property listings or attended an open house?** | ☐ | ☐ |

### 5 FINANCIAL READINESS

| | ✓ | ✗ |
|---|---|---|
| **Are they pre-approved for a mortgage or otherwise financially prepared?** | ☐ | ☐ |
| **Have they indicated any barriers to purchasing or selling?** (e.g., unresolved legal or financial issues) | ☐ | ☐ |

### 6 REFERRAL SOURCE

| | ✓ | ✗ |
|---|---|---|
| **Was the lead referred by a trusted source?** (e.g., previous client, partner agency) | ☐ | ☐ |
| **Are they repeat clients or have a history of working with your agency?** | ☐ | ☐ |

Score ___ /12

## Rex Pro Tip

**If any answer above is ✗ then add that lead to a track in Rex CRM to keep in contact and slowly warm them up until they are ready for your services**

Part 2

# Suggestions for Tracking Interactions and Follow-Ups

**Even if you don't use Rex CRM system, it's crucial to stay organised and consistent. Here are some tips to manage lead interactions effectively:**

Select ✓ or ✗ if you/your team perform this action.

### 1 MAINTAIN A LEAD TRACKER

| | ✓ | ✗ |
|---|---|---|
| Use your existing CRM system, a spreadsheet or any digital document to record lead details such as contact information, property preferences and timeline. | ☐ | ☐ |
| Regularly update the tracker or CRM to reflect the latest interactions and progress. | ☐ | ☐ |
| If you already have a CRM, ensure you're leveraging its features to segment leads, schedule follow-ups and track engagement effectively. | ☐ | ☐ |

### 2 PRIORITISE LEADS

| | ✓ | ✗ |
|---|---|---|
| Categorise leads as "Hot," "Warm" or "Cold" based on their readiness to act. | ☐ | ☐ |
| Focus your efforts on high-priority leads to maximise conversion rates. | ☐ | ☐ |

### 3 SET REMINDERS FOR FOLLOW-UPS

| | ✓ | ✗ |
|---|---|---|
| Use a calendar app, task management tool or your CRM's scheduling feature to set reminders for follow-ups. | ☐ | ☐ |
| Include specific notes on what to address during your next interaction. | ☐ | ☐ |

### 4 TRACK ENGAGEMENT HISTORY

| | ✓ | ✗ |
|---|---|---|
| Keep a log of every call, email and meeting for each lead in your tracker or CRM system. | ☐ | ☐ |
| Refer to this log to tailor future communications and build rapport. | ☐ | ☐ |

### 5 AUTOMATE WHERE POSSIBLE

| | ✓ | ✗ |
|---|---|---|
| Use email templates or automation tools to send personalised updates or property recommendations. | ☐ | ☐ |
| Schedule these communications to maintain consistent engagement. | ☐ | ☐ |

### 6 ANALYSE YOUR EFFORTS

| | ✓ | ✗ |
|---|---|---|
| Periodically review your lead tracker or CRM data to assess conversion rates. | ☐ | ☐ |
| Identify patterns in high-priority leads to refine your qualification process. | ☐ | ☐ |

Score ___ /13

Part 3

# Bonus tips for success

Select ✓ or ✕ if you/your team perform this action.

**1 STAY PROACTIVE**

Regularly review and update your lead records to ensure no opportunity is missed.

**2 PERSONALISE COMMUNICATION**

Use details from your tracker or CRM platform to tailor your messages and make each interaction meaningful.

**3 CONSIDER UPGRADING YOUR CRM**

If your current system lacks certain features or is inefficient, exploring advanced CRM options like Rex Software could streamline your efforts and boost results.

**4 LEVERAGE TEAM COLLABORATION**

Ensure all team members have access to the same lead information to maintain consistency and avoid duplicating efforts.

**5 FOCUS ON CONTINUOUS IMPROVEMENT**

Gather feedback from clients and your team to refine your lead qualification process and tracking methods.

Score /5

# Conclusion

By using this Lead Qualification Checklist, you'll be able to identify high-priority leads and build stronger relationships through organised, data-driven interactions. Whether you're using a simple spreadsheet, a basic CRM or considering an upgrade, staying consistent and strategic is key to turning qualified leads into satisfied clients and repeat business.

## Time for a CRM upgrade?

To see how Rex can help grow your business simply book a demo to discuss your requirements with our UK sales team

www.rexsoftware.co.uk/demo

## Liked this checklist?

**You can find more resources like this for estate agencies at www.rexsoftware.co.uk/resources**

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