The Connected Office Checklist

Quick self-assessment to identify strengths and gaps in your internal collaboration

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Is your office well connected & your internal collaboration strong?

Even agencies with modern CRMs and internal systems can find themselves slipping back into inefficient habits. If any of the following sound familiar, it might be time to revisit how your tools are being used, not whether you have them.

Use this checklist as a quick self-assessment to identify strengths and gaps in your internal collaboration.

NEED A HAND REVIEWING YOUR SETUP?

If you'd like a fresh perspective on how to create a more connected, productive office, our team is here to help.

Want to learn more about Rex CRM?
Send us a message at www.rexsoftware.com/contact

We'll walk you through how agencies like yours are using Rex to streamline communication, reduce unnecessary meetings and give everyone the clarity they need to do their best work. No hard sell, just practical advice and examples to get you moving in the right direction.

Checklist

If all items are ticked, your office is well connected.

VISIBILITY

- [ ] Team members can check the status of listings, leads or contacts without help
- [ ] Shared dashboards or pipelines are updated in real time
- [ ] Progress notes and next steps are recorded in the CRM
- [ ] All team members understand how and where to find this information

ACCOUNTABILITY

- [ ] Each step in your listing, appraisal & sales workflows has a clear owner
- [ ] Deadlines or due dates are visible
- [ ] Tasks are assigned & tracked in your CRM
- [ ] It's clear who's responsible for what when multiple team members are involved

CONSISTENCY

- [ ] You have documented templates or workflows for key processes
- [ ] Everyone knows where to find and how to use these templates
- [ ] Admin and agents are aligned on how each step should be executed
- [ ] Updates to processes are formally rolled out to all staff

ONBOARDING

- [ ] New hires are given role-specific onboarding workflows
- [ ] Onboarding tasks are tracked and assigned in your CRM or project management tool
- [ ] New team members can follow real workflows digitally to learn how things work
- [ ] Key tools & templates are introduced early

ALERTS

- [ ] Notifications are role-based
- [ ] Important alerts stand out and aren't lost among low-priority notifications
- [ ] Notifications are linked to actions
- [ ] Users can manage their notification preferences

EFFICIENCY

- [ ] Meetings are used for decisions, not status updates
- [ ] Status updates & discussions happen in shared systems
- [ ] Internal questions are often answered by checking the system
- [ ] Handover notes are captured in the CRM

FEEDBACK LOOPS

- [ ] There's a simple way for staff to suggest workflow improvements
- [ ] Suggestions are reviewed, considered and discussed regularly
- [ ] Improvements are communicated back to the team when implemented
- [ ] Staff are encouraged to flag bottlenecks or redundant steps