FREE GUIDE

Following Up with Leads: A Simple CRM Routine for Agents

Most deals come from leads that weren't ready the first time you talked. A short routine you repeat every day beats a big push once a month.



Every day (30 minutes)

- ✓ Reply to every new lead within minutes when you can. Call first, then text.
- ✓ Tag each lead: buyer or seller, timeline, area, price range.
- ✓ Set the next follow-up date before you close the record.
- ✓ Work your follow-up list for today, oldest first.

Every week

- ✓ Review hot leads: anyone who looked, asked or replied this week.
- ✓ Send one useful piece of local info to your long-term list.
- ✓ Clean up: merge duplicates and update stages.

A simple cadence for new leads

1. Day 1: call, text and email.
2. Days 2–3: one more call and a short text.
3. Week 2: send something useful, like matching homes or a value estimate.
4. Monthly after that: a personal check-in plus local market news.

Messages that continue the conversation

These are suggested scripts, not messages from actual clients. Adapt them to what the person requested. Use the contact channels they consented to, respect opt-outs, and follow brokerage contact rules.

> **After a buyer requests listings**
> "Hi [first name], you asked about homes in [area]. Is there a specific home you want to discuss, or would a shortlist help? What price range should I work within?"
>
> **After a seller requests information**
> "Here is the resource you requested. What would be most useful next: preparing the home, understanding the selling process, or discussing timing?"
>
> **When someone is not ready yet**
> "No rush. Would you prefer that I check back closer to your move date, or send updates in the meantime? Which works best for you?"

A useful CRM note

Illustrative record: Buyer · Chicago · exploring condos · timeline not confirmed. Requested a checklist of association questions. Email follow-up agreed. Next action: send the checklist and ask when they would like to reconnect.

Record what the person actually said, not assumptions about their budget or readiness. Keep sensitive financial documents out of general notes. When the conversation becomes an executed contract, review the transaction handoff in KRK+.

Keep a clear record

Log every conversation in your CRM. Six months from now, the note you left is what lets you pick up right where you stopped.

See how leads move at Kap Rate Living: lead capture and follow-up.