ACTION CHECKLIST

CHAPTER 1: FOUNDATIONS OF LEAD GENERATION

- [ ] Categorize your lead sources (e.g., Zillow, PPC, Facebook, referrals)
- [ ] Label leads by intent: high-intent (property-specific) vs. general search
- [ ] Reintroduce traditional methods (Craigslist, mailers, open house flyers)
- [ ] Audit current lead flow—identify gaps or weak sources
- [ ] Create a lead source tracking sheet to monitor volume and ROI

CHAPTER 2: LEAD MANAGEMENT PROTOCOL

- [ ] Implement the "3x3" Follow-Up System (3 calls + 3 texts per day for 3 days)
- [ ] Transition to:
  - 3x/week for Weeks 1–3
  - 3x/month for Months 1–3
  - Monthly outreach indefinitely
- [ ] Set up geographic and skill-based lead routing in your CRM
- [ ] Train team on "double dialing" and persistent contact methods
- [ ] Launch onboarding structure for new agents: 5-lead trial + review
- [ ] Track KPIs weekly (response time, attempts, conversion rate)

CHAPTER 3: LEVERAGING TECH & VIRTUAL ASSISTANTS

- [ ] Hire or assign VA ISAs focused on follow-up, not sales
- [ ] Provide scripts, templates, and training for follow-up interactions
- [ ] Set up "warm and fuzzy" email drip campaigns
- [ ] Assign VAs to monitor CRM tasks and overdue activities
- [ ] Use tools like Keeping Current Matters or Google Alerts for valuable content
- [ ] Equip VAs to flag re-engaged leads for agent follow-up
- [ ] Document clear responsibilities + performance expectations for ISAs

CHAPTER 4: MARKETING & OMNIPRESENCE STRATEGIES

- [ ] Create a 3x/week newsletter schedule with local + real estate content
- [ ] Launch retargeting ad campaigns ($7/day minimum)
- [ ] Build a content calendar (market updates, testimonials, videos)
- [ ] Eliminate "lazy" outreach phrases—focus on meaningful content
- [ ] Set up automation for email, social, and retargeting systems
- [ ] Monitor open rates, clicks, and engagement weekly to optimize strategy

CHAPTER 5: TEAM TRAINING & IMPLEMENTATION

- [ ] Introduce "5-5-10" onboarding system for new agents
- [ ] Role-play lead conversations and objection handling weekly
- [ ] Create and maintain a living team manual with scripts + systems
- [ ] Launch daily CRM dashboard review habit for all agents
- [ ] Schedule weekly team huddles:
  - "Victory laps" (wins)
  - "Challenge solving" (peer coaching)
- [ ] Implement a shadowing program for new agents
- [ ] Use supportive accountability (not punitive) with regular metric reviews

CHAPTER 6: IMPLEMENTATION BEST PRACTICES

Distribute all key resources:

- VIP Buyer Guide
- Buyer/Listing presentations
- Appointment checklists
- Follow-up scripts

- [ ] Train agents on the "Kitchen Island Strategy" for home-based consults
- [ ] Implement communication best practices (value-driven, not generic)
- [ ] Configure CRM properly with lead stages and automation
- [ ] Assign VA ISAs to oversee task completion and agent performance
- [ ] Schedule weekly QA sessions: review lead status, response time, conversion rates
- [ ] Apply the "Triple A" model: Awareness, Action, Accountability
- [ ] Introduce and enforce a daily Success Checklist (AM, mid-day, PM)
- [ ] Encourage "micro-adjustments" for sustainable improvements