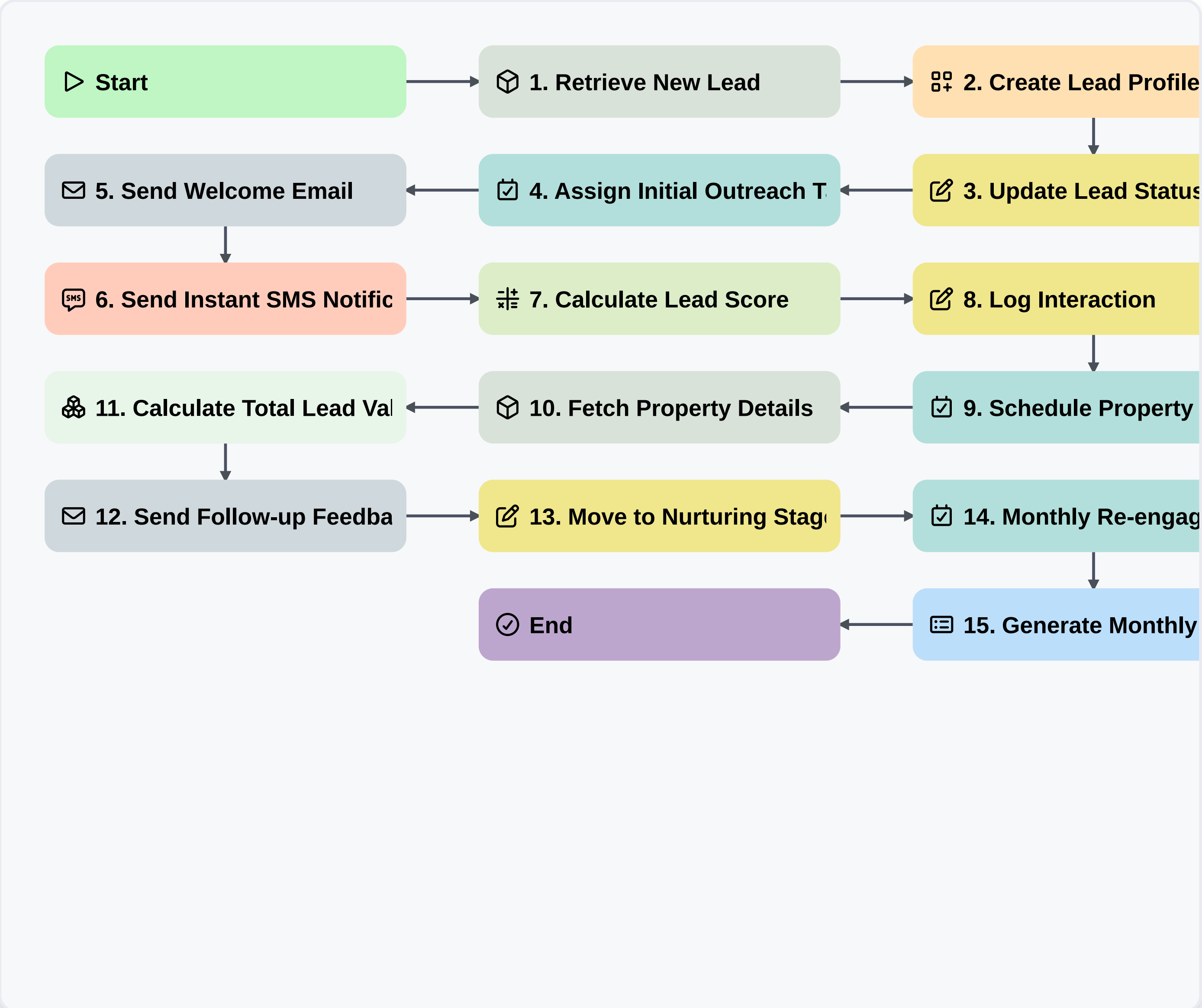
ChecklistGuro

Real Estate CRM Lead Nurturing Process



Start
Start of the Workflow/Process.

1. Retrieve New Lead
Fetch new lead entries from the Lead Data Model where status is 'New'.

2. Create Lead Profile
Create a new entry in the Lead Data Model from an incoming web form or inquiry.

3. Update Lead Status
Change the status of a Lead entry from 'New' to 'Contacted'.

4. Assign Initial Outreach Task
Create a task for the assigned Sales Agent to call the new lead.

5. Send Welcome Email
Send an automated introduction and property catalog email to the lead's email address.

6. Send Instant SMS Notification
Send a short text message to the lead confirming we received their inquiry.

7. Calculate Lead Score
Calculate a lead priority score based on budget, timeline, and engagement frequency.

8. Log Interaction
Update the Lead entry with the timestamp and details of the recent phone call.

9. Schedule Property Viewing
Create a task for the agent to coordinate a physical tour of the property.

10. Fetch Property Details
Retrieve data from the Property Data Model related to the lead's interest.

11. Calculate Total Lead Value
Sum the estimated property values of all leads currently in the 'Hot' pipeline stage.

12. Send Follow-up Feedback Request
Send an email to the lead after a viewing to gather feedback on the property.

13. Move to Nurturing Stage
Update the Lead entry status to 'Nurturing' if no immediate sale is identified.

14. Monthly Re-engagement Task
Create a recurring task for the agent to check in with long-term nurturing leads.

15. Generate Monthly Conversion Report
Create a report showing the conversion rate from 'New' to 'Closed' for the month.

End
End of the Workflow/Process.