



5 REAL ESTATE LEAD GENERATION OPTIMIZATION CHECKLISTS FOR 2022

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LEAD GENERATION CHECKLIST

Use this checklist to confirm necessities for real estate lead generation. By completing the items below, you can ensure that you're properly set up to generate online real estate leads.

1. Lead Generation Technology

- Web content management system.
- Client relationship management system.
- Marketing automation software.

2. Campaign Management

- Lead generation ads (ex: Facebook, Instagram, Google Ads, LinkedIn, etc.)
- Retargeting ads.
- Offline promotion schedule with website & social media links (ex: direct mail, newspapers, door hangers, flyers, sponsorships, etc.).
- Referral program.

3. Lead Capture Website

- Real estate tools (ex: home search, comparative market analysis, recently sold homes, market reports, community reports, points of interest, etc.).
- Listings (ex: your active, pending, sold listings with the ability to save/favorite).
- Local/real estate Blog (with social media share links).
- Links to your social media in footer.
- Resources pages (for how-to videos, guides, checklists, infographics, neighborhood info, etc.).
- Call-to-action buttons (ex: request a free consultation, request more information, request a showing, get a free valuation, contact me, etc.).
- Lead capture forms (pop-up & embedded forms on high traffic webpages).
- Landing pages (for embedding forms, for social media, for social/digital ads, etc.).
- Tracking via contact database integration (ex: registers new leads, records lead behavior - home search criteria/saved listings/email opens).

4. Social Media

- Social media networks (ex: Facebook, Instagram, Twitter, LinkedIn, Pinterest, YouTube, NextDoor, etc.).
- Content library (ex: real estate info, market reports, local events, blog articles, webinars, workshops, open houses, listings, photos with clients, videos, infographics, guides, tools, season-specific advice, tips, best practices, testimonials, case studies, etc.).
- Content calendar (for scheduling content & promotions).
- Personal and/or business accounts.
- Local & real estate groups on social media (ex: Facebook, Pinterest, NextDoor).
- Automated social media post scheduler.
- Set up automated chatbot follow ups.

5. Lead Nurturing

- Personalized email marketing campaigns (ex: buyer campaign, seller campaign, newsletter, content promotion).
- Email marketing schedule.
- Automated follow-up system for emails/messages.
- Lead segmentation (ex: zip code, buyer/seller, lead source, lead rating, etc.).
- Email workflows for each lead segment.
- Lead scoring (cold lead, warm lead, hot lead based on behavior).

6. Lead Generation Measurements

- Website visitors by source (ex: direct, organic, paid, social, email, etc.).
- Leads & clients by source.
- Lead added, converted, and closed dates.
- Conversion rates.
- Content performance.
- Client acquisition costs.

NEW LEAD QUALIFICATION CHECKLIST

Use this checklist to qualify new real estate leads and manage them in your CRM. By completing the items below, you can determine which leads to invest your time and the strategies to convert them into a client.

1. Lead Management Set Up

- Client Relationship Management system with lead tracking, scoring, alerts, integrations, etc.
- Enable automated follow up system and email marketing campaign workflows.
- Determine metrics for your current database (ex: # of contacts, # of leads, # of active clients, # of cold/warm/hot leads, # of buyer leads, # of seller leads, # of new leads per month, # of leads that resulted in closing, etc.)

2. Lead Qualification Part 1 (Before Calling)

- Review the lead's details in your CRM.
- Investigate and research the lead's social media profiles.
- Are they truly interested in buying/selling a home or are they just browsing?
- Do they need to buy/sell? (Did they have a baby recently? Did they get married recently? Was there a recent death or divorce? Are they retired? Are they relocating to a different city/state? etc.).
- Can they afford to buy a home? (What's their current rent/mortgage? Is their household single or double income? What price ranges are they searching for?).

3. Lead Follow Up

- Leverage automation to instantly follow up when new leads register into your CRM.
- Call then text, or text then call the lead to schedule up a phone appointment.

4. Lead Qualification Part 2 (During a Call)

- Location: Is the lead looking to buy in a specific location or neighborhood? (Are they looking for homes in your territory? Is there a specific listing they're interested in? What are their preferred zip codes? Are they interested in similar properties in different zip codes?).
- Motivation: What's their motivation for buying a home? (Are they first-time homebuyers, downsizing for retirement, looking for an investment property, relocating?).

- Budget: What price ranges are they searching? (How much of a down payment can they put down? How good is their credit score? How much debt do they have?, etc.).
- Financing: Have they been pre-qualified or pre-approved by a lender? (Do they need financing or will they pay cash? Do they have a pre-approval letter?, etc.).
- Representation: How have they been searching for homes? (Are they using an app like Redfin? Are they working with an agent/broker? Have they signed a buyer agent's agreement?).
- Preferences: Do they need certain requirements for their new home? (ex: Home features, amenities, location to points of interest, age of home, backyard, garage, # of bed/baths, etc.).
- Timeframe: When would they like to be moved in? (How long have they been searching? How ready are they to buy and move in? Do they need to sell a home before buying? Can they submit an offer if you found the ideal home tomorrow?).
- Appointment: Can they meet in person to discuss their property search? (Can they meet as soon as possible? Which days/times can they meet? Is there sense of urgency?).

5. Lead Categorization

- Score your lead (ex: cold, warm, hot).
- Group the lead into a category (ex: buyer or seller? Preferred zip code? # of beds/baths, renter or homeowner?).

6. Lead Nurture

- After qualifying leads, assign them to the right email marketing campaign workflow (ex: cold/hot lead, buyer/seller, etc.) and follow them on social media.

7. Lead Tracking

- Record actions taken by you and the lead. (ex: home search criteria, # of calls/call attempts).
- Measure your results.

WEBSITE SEO CHECKLIST

Use this checklist to improve your website's SEO. By completing the items below, you can increase organic traffic to your website, rank higher on Google's search engine, and generate more real estate leads online.

1. Set Up SEO Basics

- Set up [Google Search Console](#) to measure your website's search traffic and performance.
- Set up [Google Analytics](#) and Install Google's pixel to track your website's traffic and performance.
- For WordPress websites, install the [free Yoast SEO plugin](#) to leverage SEO suggestions.
- Secure your website by [adding HTTPS://](#) to the URL.

2. Research Keywords

- Discover long tail keywords by typing keywords into Google's search and review their list of suggestions – or use [keywordtool.io](#) for an extensive list of suggestions.
- Use [Google's Keyword Planner](#) to research relevant keywords, their # of monthly searches, and their competition level.
- Look for keywords on local/real estate forums, Facebook/Reddit searches, Quora, etc.
- Use [AnswerThePublic's Question Keyword tool](#) to explore question-based long tail keywords (Effective for brainstorming blog post topics).
- Analyze your webpages and fix them if the content doesn't match a [searcher's intent](#).
- Use [SEMrush's Domain Overview tool](#) to see keywords used by your competitors.

3. Enhance On-Page SEO

- Add your keywords to your URL's.
- Keep your [URL's short](#) – between 30 to 60 characters.
- Use keywords at the beginning of a page's title and title tag.
- Add [modifiers into your title tags](#).
- Include your keyword at least once within the first 100 to 150 words of a webpage.
- Include your keywords in headers and subheaders.
- Include your keywords in your images' file name, descriptions, and alternative text.
- Use variations of your keywords by including synonyms and [Latent Semantic Indexing \(LSI\) keywords](#) through out your webpage's content. Research free LSI Keywords with [LSIGraph](#).
- Add external links to trusted, authority websites.
- Add internal links to other pages on your website.

4. Improve Technical SEO

- Discover suggestions to improve your website's SEO with [HubSpot's free Website Grader tool](#).
- Fix broken internal and external links.
- Identify and remove duplicate content (titles, descriptions, images, files, etc.) on your website.
- Ensure your website can be found/indexed on Google by [fixing crawl errors](#).
- Ensure your webpages can be found/indexed on Google with [Google's URL Inspection Tool](#).
- Adapt your website to be mobile-friendly.
- Improve your website's loading speed with [PageSpeed Insights](#).

EMAIL/CRM CHECKLIST

Use this checklist to improve your emails and CRM. By completing the items below, you can increase lead generation from your contact database by improving your email open, click, conversion, and follow up rates.

1. Email Details

- Confirm the correct sender email address.
- Confirm the correct recipient(s) email address.
- Confirm the subject line reflects the email body and call to action.
- Confirm the scheduled send date is correct.

2. Email Body

- Add personalization tokens.
- Confirm all dates, times, and locations included are correct.
- Confirm call to action is clear and the call-to-action button is easy to locate.
- Confirm email signature is accurate and includes contact info, website, and social media links.
- Confirm that the unsubscribe link works.
- Check for white space and structure.
- Use bullet points when listing items.

3. Email Review

- Use [Grammarly](#) to double check for spelling/grammar errors in your subject line, pretext, and body.
- Remove [SPAM trigger words](#) from the subject line, pretext, and body. (ex: free, order, etc.).
- Double check all relevant recipients are added to sender list.
- Check to see if all documents are attached (if applicable).
- Confirm that all links work.
- Confirm that your forms attribute submissions as an email lead source.
- Create and review HTML version of your email.
- Confirm email formatting is compatible on desktop and mobile.
- Track the success of your email by calculating its open rate, click rate, and form submissions.
- Click send or schedule your email!

4. (Client Relationship Management) CRM

- Use automation to follow up with lead engagement and to send emails in a workflow.
- Confirm lead behavior tracking (ex: saved home searches, favorited listings, email opens, etc.).
- Confirm all contact information is correct and current.
- Segment your leads into groups (ex: buyer/seller, zip code, lead rating, demographics, etc.).
- Use lead alerts to stay up to date with lead activities and follow up if needed.
- Leverage lead ratings to categorize leads by quality, track their progress through your funnel, and identify campaigns that produce high-quality leads (ex: cold, warm, and hot leads).
- Confirm integrations and synchronization between all your CRM's.
- Confirm email workflows are set up properly (ex: behavior triggers, time delay between emails, cadences, exclusions, etc.).

REAL ESTATE CONTENT CHECKLIST

Use this checklist to build your real estate content library. Use the ideas below to develop/gather engaging content (graphics, videos, infographics, blog articles, etc.) to engage, attract, and generate real estate leads through your marketing platforms (your website, social media, email, search engines, webinars, etc.).

1. Buyer and Seller Content Topic Ideas

- Benefits of working with a real estate agent/broker.
- Local market reports.
- Testimonials from recent clients.
- Explain closing costs.
- How to plan for retirement.
- Downsizing tips for seniors.
- Moving out tips/checklist.
- Frequently Ask Questions (FAQ's).

2. Buyer Content Topic Ideas

- Active listing photo collage.
- Photo with recent home purchase client.
- First-time homebuyer process timeline.
- How to buy a home from out-of-state.
- Pros and cons of renting vs buying.
- Buying tips for a specific season or month.
- Advice for buying a home.
- Hidden costs of buying a home.
- Explain the benefits of homeownership.
- Explain the mortgage process.
- Tips for choosing a mortgage lender.
- Required documents to get pre-approved.
- News about new developments.
- Benefits of home warranties.
- Homebuyer success hacks.
- Common homebuyer mistakes to avoid.
- Explain buying a home during covid.
- Disprove homebuyer myths (ex: down payments, real estate bubble, etc.).
- Buyer expectations vs. reality.
- How schools in a district rank in certain categories (ex: sports, testing, graduation rate, college acceptance rate, etc.).
- Red flags to look for during a showing.

3. Seller Content Topic Ideas

- Recently sold home photo collage.
- Home seller process timeline.
- Explain the steps to list a property.
- Explain the benefits of selling NOW.
- Pros and cons of FSBO's.
- Home improvement tips that improve home value.
- Tips for selling a home during a specific month or season.
- Advice for selling a home.
- Increases in property value by zip code.
- Home seller success hacks.
- Common home seller mistakes to avoid.
- Common pricing mistakes.
- Home improvement mistakes for sellers.
- Explain selling a home during covid.
- Disprove home seller myths.
- Seller expectations vs. reality.
- The benefits of staging and curb appeal.

4. Homeowner Content Topic Ideas

- Advice for homeowners.
- Basic home maintenance tips.
- Seasonal maintenance tips.
- Essential products (ex: tools, emergencies, maintenance, seasonal, etc.).
- Community events (ex: classes, activities).
- Points of interests (ex: businesses, restaurants, parks, entertainment, etc.).
- News that affects homeowners (ex: new laws, property tax changes/rebates, rezoning, business developments, etc.).
- Major discounts on products/services that increase home value (ex: appliances, bathroom features, kitchen features, windows, landscaping, etc.).