



DR University

Lead Management!

November 2025

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Agenda

- Why follow-up is essential to your success
- Lead do's and don'ts
- 16-Point Lead Follow-Up Checklist
- Things to ask yourself when sending follow up communication
- Follow-up Tips & Tricks!
- Past Client Follow-Up Ideas
- Client File Review



Why follow-up is essential to your success

- People today are busy and expect convenience. To win, we must be more convenient and more valuable than any other option.
- Always put yourself in your lead's shoes.
- Zillow leads have likely scrolled through many listings — it's quick, easy, and pressure-free.
- But browsing Zillow doesn't educate buyers the way real market data, property activity, pricing insights, and in-person showings do.
- If Zillow browsing truly worked as the full buying process, buyers would purchase the first home they clicked on — but they rarely do (hence the "Unicorns").
- What actually happens: the buyer was simply ready to take a next step at that specific moment.
- Your follow-up is what positions you to be the person they call when they're ready again.



Lead Do's & Don'ts!

You need to be MORE convenient and more valuable than Zillow!
How can you do that?

LEAD DO'S

Keep messages and calls **quick, valuable, and easy to respond to.**

- **Voicemail**
 - "Hey, it's _____. Give me a call back."
- **Text Listings**
 - Send **NEW** listings (not ones they've already seen on Zillow).
- **Styles to Use:**
 - Simple text with the listing.
 - Text + link to your calendar.
 - Yes/No questions.
 - Specific feature questions: "Do you like this kitchen?"
- **Use Light Negative Feedback**
 - "Great house, but it's on a busy road. If we tour it, I'll get a decibel reading."
- **Send Slightly Outside Their Area/Price Point**
 - "This one is ~10 minutes further out, but worth a look. Too far?"
- **Ranking Questions**
 - "Thumbs up or down?"
 - "1-10 — where are you on this one?"
- **Reference Listing Photos**
 - "Terrible photos, but I bet it looks great in person."
 - "Photos look good, but I'm curious how it shows in-person."
- **Promote Design Realty Listings**
 - Highlight before/after photos and anything visually compelling.

LEAD DON'TS

- **Send bland messages like "Hey, just checking in."**
- **Reference missed messages or appointments: "Did you get my message last week?", or "Following up on the appointment you missed..."** These trigger negative emotions and cause avoidance.
- **Send long messages.**
- **Reference financing.**

16-Point Lead Follow-Up Checklist

First note: ALWAYS call or text. Emails should be in addition to that UNLESS their primary means of communication have been email.

Call with a quick direct question

"Hey I forgot to ask, do you need a gas cooktop, or will electric suffice?"

Text new listing

"Just popped up today"
Include your link to schedule it

Text old listing

"This one ended up with 5 offers, selling for \$ ____ with \$5,000 in seller concessions"
Call listing agent for info

Call w/the original property they inquired on

"Hey, this listing has seen very little traffic. Comps suggest it's overpriced — one nearby sold for X last month. I'll keep watching it, but I doubt it will reach asking."

Text listing with a negative

"This one looked great, but that road it's off is a VERY busy road and would be tough to turn left out of"

Send video tour

"Hey popped into this one, only problem I found is you can hear the traffic from the freeway. The decimal reader read a __"

Personal Question NOT about buying a house

"Hey do you have an electricians you work with and like? Our listing team is looking for someone."

Text/Call

"Quick thought: would you be open to XYZ" — shows them you are thinking strategically!

Market updates that are relevant to them

Leverage market reports on Zillow or other platforms

Seasonal market updates

"There is a lot on the market, and a lot of competition. It's surprising to most, but we typically see it fizzle in July, and often times we see price cuts in August."

Land use action

"Hey looks like some more housing is going in!"

Ask for a review

"Would you mind giving me a review thus far?" — provide a link!

Text scheduling link

"Hey I'm anticipate a spike in inventory this Friday. Do you want to go poke around?"

Outreach about their interests!

Interesting article on a topic they are interested in, text about how their favorite team is playing, etc.

Invitation to DR classes including land classes and first-time home buyer's

Hit us up with client-facing educational event ideas!

Offer to Past Client items like Thanksgiving Pies or other DR client campaigns

Leverage our Support Team offerings!

16-Point Lead Follow-Up Checklist

Other Ideas?

Past Client Follow-Up Ideas

Why past clients?

Consistent, thoughtful follow-up with past clients helps build lasting relationships, encourages referrals, and keeps you top of mind when they're ready to make their next move—or know someone who is. Below is a seasonal guide full of easy, impactful ideas to help you stay connected in meaningful ways.

Winter

Idea – Santa Photos

- **Event Idea:** Host a Santa photo day for clients and their families—great for kids and holiday cards!
- **Bonus:** Offer printed photos or a digital download link.
- **Follow-Up:** Send a thank-you text or email with a favorite photo attached.
- **Did you know?** D|R hosts this event every year for free you, your clients and the community? All you have to do is send out invites and spread the word!

Spring

Idea – Seeds or Sweet Treats

- **Gift Idea:** Deliver a packet of wildflower seeds or a spring-themed treat (like lemon bars or macarons).
- **Message:** “Here’s a little something to brighten your garden—or your day! Thinking of you this spring.”
- **Photo Reminder:** Take a photo of the drop-off and send a cheerful message with it.

Summer

Idea – 4th of July

- **Gift Idea:** Drop off mini flags, sparklers, or a festive treat (like red, white & blue cookies).
- **Message:** “Just popping by with a little sparkle for your 4th! Hope your summer is off to a great start.”
- **Photo Reminder:** Snap a quick pic of the gift on their doorstep or in hand, then text it to them with a personal note.

Fall

Idea – T-giving Pie Delivery

- **Gift Idea:** Pre-order pies (apple, pecan, fruit) and deliver just before Thanksgiving.
- **Message:** “Grateful for amazing clients like you! Enjoy this pie with your loved ones.”
- **Pro Tip:** Schedule deliveries over a few days and send a text with a photo to confirm and connect.
- **Did you know?** D|R hosts this event every year and will **PROVIDE** you with free pies for your past clients that you’ve closed with us!

Build File

- Dump your notes from your appointment making sure you captured all the W's.
- Pin that note for easy future reference

Plan

You just met this client and should be fresh full of ideas on how to follow up with them. Write 'future you' notes that will help you do so

Example: "They really seemed delighted when I went negative on something, as well as really interested in the knowledge regarding construction. They glazed over a bit when talking about contracts and market, so I'll stay away from that for a bit. They have 2 "fur babies"

Here are some follow ups I intend on doing...

Email

Send promised emails over!

The triple threat is the name of the game.

This includes:

- Email that covers the process of buying a house
- An email introduction to a lender
 - MLS portal access email

Call

- Call the same day as the appointment!
- Likelihood they will answer is much greater - they are curious why you are calling them so soon
- Ask a very simple yes/no type of question regarding their needs, and get off the phone (*unless of course they start chatting!*)
- Example: "Hey I forgot to ask, do you need to be able to park both vehicles in the garage? Or is a smaller size garage and the ability to park in the driveway just fine?"
- Why? This gets them in the habit of answering your call, as well as creating the expectation that you will not waste their time and only bring value to them

Market trends as they apply to this deal

New listings *(try checking outside of the set criteria geographically or price point)*

Cancelled listings

Comparable listings that went pending – make calls to the listing broker to collect data

Zillow activity

Shifts in lending

Be a Follow-Up Boss....boss

REACH OUT

- After detailing these notes in FUB, you should be able to easily see if a reach out makes sense.
- Can you reach out to your client with something of value?
- Do you need to reach out to your client to get clarity on something they need?
- Reach outs should always feel valuable to the client.
- Reach outs are in the form of text or calls, emails should always be a secondary layer unless that is their primary means of communication.

GOAL

- Progress the deal down the pipeline, at their speed!
- Some people may take months or even years for things to line up and move forward with a purchase of a home.
- The goal is for you to be the valuable professional in front of them when they are ready to move forward.
- Leave a mark, be more convenient than the internet for them, be more responsive than anyone else, and show off your skill at every opportunity.