



Real Estate Agent Lead Generation Checklist

Are you struggling to find new real estate leads in a crowded market? Relying on cold calls or outdated methods costs you valuable time, reduces your deal flow, and lets competitors snatch up the best opportunities.

This checklist gives you the exact blueprint top-producing real estate agents use to establish an undeniable online presence, attract high-intent

leads, nurture prospects into clients, and build a thriving referral network.

How to Use These Checklists:

1. Go through each item systematically.
2. Mark “[]” if the point is done or applies to your current situation.
3. Mark “[]” if the point is not done or needs attention.
4. For “[]” answers, note down specific issues and

potential solutions.

5. Prioritize areas for improvement based on their potential impact on your goals.

6. Regularly revisit and update these checklists as your business and strategies evolve.

I. Online Presence & Branding

Professional Website:

[] Is there a professional, mobile-responsive website with clear branding?

[] Does it feature high-quality images and clear calls-to-action?

IDX/MLS Integration:

[] Is there seamless integration with IDX/MLS to display property listings?

Is the property search function robust and user-friendly?

Agent Bio & Specializations:

Is there an engaging agent bio highlighting expertise, local knowledge, and unique selling propositions?

Are specific niches or specializations clearly stated (e.g., luxury homes, first-time buyers, specific neighborhoods)?

Online Profiles & Directories:

Are profiles optimized on key real estate platforms (e.g., Zillow, Realtor.com, Trulia)?

Are Google My Business and other local directories updated and accurate?

Social Media Presence:

Are professional social media profiles established and active on relevant platforms (e.g., Facebook,

Instagram, LinkedIn)?

Is content regularly posted (listings, market updates, local community info)?

II. Content Marketing for Leads

Local Market Expertise:

Is content created that demonstrates deep knowledge of local neighborhoods, schools, amenities, and market trends?

Are local community guides or neighborhood spotlights produced?

Valuable Resources for Buyers/Sellers:

Are resources provided such as “First-Time Home Buyer Guide,” “Selling Your Home Checklist,” “Mortgage Calculator,” or “Moving Checklist”?

Are these available as downloadable lead magnets?

Blog/Article Content:

Is a blog maintained with articles addressing common real estate questions, tips, and advice for buyers and sellers?

Video Content:

Are video tours of properties, neighborhood walkthroughs, or Q&A sessions with agents created?

Testimonials & Case Studies:

Are client testimonials and success stories prominently displayed on the website and social media?

Are before-and-after case studies (e.g., “How I helped X family sell their home quickly”) featured?

III. Lead Capture & Nurturing

Clear Call-to-Actions (CTAs):

Are prominent CTAs used throughout the website and marketing materials (e.g.,

“Schedule a Showing,” “Get a Home Valuation,” “Contact Me”)?

Lead Capture Forms:

Are well-designed and easy-to-use lead capture forms integrated on the website (e.g., for property inquiries, newsletter sign-ups)?

Landing Pages:

Are specific landing pages

created for different lead magnets or campaigns (e.g., “Free Home Valuation,” “Download Our Seller’s Guide”)?

CRM Integration:

Is a robust CRM system in place to manage and track leads?

Are leads categorized and tagged appropriately?

Email Marketing Automation:

Are automated email nurture sequences set up for different lead types (e.g., new buyer leads, seller leads)?

Do emails provide value and move leads down the funnel?

Virtual Tools:

Are virtual open houses, 3D tours, or virtual consultations offered to capture and engage leads?

IV. Promotion & Advertising

SEO Strategy:

Is the website and content optimized for local SEO

(e.g., “real estate agent [city],” “homes for sale [neighborhood]”)?

Are long-tail keywords targeted?

Paid Advertising:

Are targeted Google Ads campaigns run for high-intent keywords?

Are social media ads (e.g., Facebook Ads) used for demographic and interest-based targeting?

Social Media Engagement:

Is engagement actively sought on social media by responding to comments and messages?

Are relevant local groups participated in?

Referral Strategy:

Is a clear strategy in place for requesting and incentivizing referrals from past clients?

Open Houses & Events:

Are open houses promoted effectively online and offline?

Are local community events participated in for networking and lead generation?

V. Tracking & Optimization

Analytics Setup:

Is Google Analytics (or equivalent) properly installed and configured to track website traffic, lead sources, and conversions?

Lead Tracking:

Are all leads meticulously tracked from initial contact to conversion?

Conversion Rate Monitoring:

Is the conversion rate from website visitor to lead, and lead to client, regularly monitored?

ROI of Marketing Efforts:

Is the ROI of different lead generation activities measured?

A/B Testing:

Are A/B tests conducted on website

elements, CTAs, and ad copy to optimize performance?

Feedback Loop:

[] Is there a system for collecting feedback from leads and clients to refine lead generation strategies?

At Brand Shop, we provide strategic guidance and hands-on support in developing and implementing comprehensive growth marketing strategies.

What We Offer

Growth Strategy and Planning:

- Comprehensive business and marketing audits
- Goal setting and KPIs
- Target audience analysis and segmentation
- Tailored Growth Strategies and Roadmaps

Digital Marketing

Expertise:

- Google Search Engine Optimisation (SEO)
- Paid advertising (PPC, Social Ads)
- Content marketing strategy and execution
- Social media growth
- Email marketing automation
- Conversion Rate Optimisation (CRO)

Marketing Technology and Automation:

- Marketing software assessment and recommendations
- Implementation and optimisation of marketing automation
- Data and analytics setup (e.g., Google Analytics, CRM integration)
- Performance reporting and insights generation

1:1 Coaching and Workshops:

- Personalised guidance on growth marketing principles
- Training on specific marketing channels and tools
- Team workshops to foster a growth-oriented mindset

Consulting Services:

- Objective analysis and strategic recommendations
- Implementation support and project management
- Performance monitoring and iteration
- Long-term partnership for sustainable growth

Additional Areas of Expertise:

- Customer acquisition and retention strategies
- Marketing analytics and reporting
- Funnel optimisation

**If you're ready to move
beyond fragmented efforts
and build a strategic,
data-driven engine for
sustainable growth—
we'd love to connect.**



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