PRACTICAL GUIDE FOR AGENTS AND BROKERS

AI Lead Follow Up Toolkit

Practical AI workflows for responding organizing and reconnecting with leads

Use AI to prepare client follow up. Review every draft before sending.

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1 CONVERSATION NOTES

Create Clear Notes After Every Call

Use AI after a call to create an accurate CRM summary and assign the next step.

GOAL	TIMING	KEY DETAILS	NEXT STEP
What they want	When they want it	Preferences and concerns	Owner and due date

Do This

1. Use a brokerage-approved transcription tool and follow consent requirements.
2. Remove sensitive information and submit the redacted transcript with the prompt.
3. Verify the summary, save it to the CRM, and assign the next step.

COPY AND USE

```
Summarize this redacted call for my CRM using four fields: goal, timing, key details, and
next step with owner and due date. Use only stated facts. Mark missing information as
“unknown.” Transcript: [paste transcript]
```

Write a Personalized Follow Up Message

Turn the lead's latest conversation into a short message with a relevant next step.

Do This

1. Choose the current reason for reaching out.
2. Add one relevant detail from the Lead Brief.
3. Generate two drafts, edit your preferred version, and send it.

COPY AND USE

```
Draft two [text or email] options for a real estate lead at the [stage] stage. Reason for
contacting them: [reason]. Relevant detail: [detail]. Useful next step: [action]. Use a
warm, direct tone and only verified facts. Ask one question. Keep it under [length].
```

3 FOLLOW UP PRIORITIES

Prioritize Today’s Follow Up

Use clean CRM fields to surface overdue actions, near-term timelines, and missing next steps.

Use These Three Lists

- Overdue promises: the next action date has passed.
- Near-term leads: stated timing is within 90 days and no meaningful contact is logged.
- Missing next step: the lead is active but the next action is blank.

COPY AND USE

```
Review this redacted lead list. Prioritize records using overdue promised actions, near-
term stated timing, unanswered questions, and missing next steps. Return lead ID, reason,
and recommended human action. Exclude names, neighborhoods, protected characteristics, and
inferred income from the ranking. Data: [paste minimal export]
```

4 REENGAGEMENT

Reconnect With a Quiet Lead

Reach out with a timely reason, a useful resource, and one simple next step.

Do This

1 Choose a relevant reason based on their timing, criteria, or a verified update.
2 Offer one helpful next step.
3 Use their preferred channel and frequency, and honor any request to pause.

COPY AND USE

```
Draft three brief reengagement messages. Last conversation: [topic and date]. Stated goal
and timing: [details]. Verified reason to contact them now: [reason]. Offer one useful
next step. Keep the tone helpful, low pressure, and permission based. Open with the
specific reason instead of “just checking in.”
```

5 READY TO USE PROMPTS

Use the Right Prompt for Each Lead

Give AI verified facts and one clear assignment.

New Inquiry

```
Draft two first-response texts under 280 characters. Confirm this inquiry: [question or property]. Use this verified status: [status]. Offer these times: [times]. Ask one easy question. Keep the tone helpful and factual.
```

After an Open House

```
Draft a follow-up text using these notes: [notes]. Mention the property and one detail the visitor raised. Offer one next step. Use only the representation and purchase timing information provided.
```

Buyer Follow Up

```
Draft a concise recap using these approved notes: [notes]. Confirm the buyer’s stated criteria, unanswered questions, and next action. Use objective property facts and leave out neighborhood rankings, school opinions, safety claims, and future value predictions.
```

Seller Follow Up

```
Draft a seller update using these verified facts: [facts]. Separate activity from interpretation. Use only the pricing recommendation I provide and present outcomes as possibilities rather than guarantees. End with one decision question.
```

FINAL REVIEW

Review Every AI Draft Before Sending

A quick review protects accuracy, tone, and the client relationship.

CHECK THE DRAFT

- ☐ Names, dates, prices, status, and property facts are correct.
- ☐ The message sounds like me.
- ☐ The next step is clear and useful.

PROTECT THE CLIENT

- ☐ Sensitive data and private financial information have been removed.
- ☐ MLS information is used only as authorized.
- ☐ The language supports fair housing and avoids steering or unsupported neighborhood claims.
- ☐ Consent, opt-outs, MLS rules, and brokerage policy are respected.

The Five Minute Routine

1. Open the lead record.
2. Update the four-part Lead Brief.
3. Run one saved prompt.
4. Verify and personalize the draft.
5. Send it and schedule the next action.

AI prepares the work. You protect the relationship.