Lead Generation Systems

Build a repeatable way to meet people, understand their real estate needs, and follow through. A useful lead generation system connects your relationships, community presence, prospecting, digital inquiries, and CRM records so that each opportunity has a clear next step.

At List n Show, the goal is to develop several sources of business around a foundation of relationships. Company leads and marketing resources can support that work. Your responsiveness, service, and consistent follow-up turn an initial inquiry into a relationship.

How to use this guide

Work through the eight sections in order. Complete the practice activities in your notebook or approved CRM and compare your responses with the suggested answers. Use sample language as a starting point, adapting it to the person, your experience, and company practices.

Finish with the 30-day plan and planning worksheets. Choose a manageable set of activities you can sustain while meeting current client and transaction obligations. A more visible pipeline improves planning; it does not guarantee transactions or income.

What you will create

- A mix of lead sources that fits your interests, time, and budget.
- A CRM process for source tracking, pipeline stages, and dated next actions.
- Practical approaches to referrals, digital inquiries, farming, prospecting, and open houses.
- A weekly review and a way to compare activity, conversion, cost, and results.

Your route through the guide

1 Build a repeatable lead generation system

2 Make the CRM your foundation

3 Develop relationships and referrals

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Your first 30 days

Worksheets and readiness review

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1 Build a repeatable lead generation system

Lead generation is the ongoing work of creating and developing business opportunities. A campaign or event is one activity within that work. A system connects the activity to contact records, conversations, follow-up, client service, and review so that opportunities do not depend on memory or occasional bursts of effort.

Understand the five source categories

- Sphere of influence: friends, family, neighbors, past clients, community contacts, and others who know you. This is the relationship foundation of the company approach.
- Referral relationships: professionals and past clients who may introduce people needing help. Examples include attorneys, lenders, contractors, insurance professionals, and financial advisors.
- Community and geographic presence: farming, local events, networking, community involvement, and useful social media activity.
- Broker-sponsored and digital leads: company opportunities, website inquiries, property search registrations, and other online inquiries.
- Prospecting: expired and cancelled listings, For Sale By Owner opportunities, approved cold outreach, and open houses.

These categories overlap. An open house can produce a buyer inquiry, a neighbor relationship, and a referral partner. Record the original source consistently and add useful relationship details rather than counting one person several times.

Choose a manageable mix

Start with relationships and add activities you can execute well. Consider your communication style, market knowledge, available hours, costs, and ability to follow up. Develop multiple sources over time rather than relying entirely on one website, partner, or campaign.

For example, you might combine personal SOI conversations with a regular open house and timely follow-up on assigned digital inquiries. This is an example, not a required company formula. Add another channel only when you can support its follow-up.

Connect activity with service

Divide your work among business development, client service, and administration. Protect time for creating opportunities without delaying client needs or transaction deadlines. List n Show provides CRM and RBO systems, Transaction Coordination, training, compliance support, and broker oversight to support your work. These resources help organize the business; they do not replace your client responsibilities.

Put it into practice

List your current sources of opportunity. Mark which depend on existing relationships and which require meeting new people. Choose two activities to perform consistently over the next month and write when you will follow up on the people you meet.

Check your understanding

Would receiving more leads solve a pattern of missed follow-up?

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Suggested answer: Not by itself. First connect each inquiry to an accurate CRM record, a conversation plan, and a next action you can complete.

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2 Make the CRM your foundation

Your customer relationship management system, or CRM, connects every lead source to a follow-up process. The company rule is that every lead goes into the CRM. Record business contacts promptly, including referrals, online inquiries, open house contacts, SOI opportunities, and prospecting contacts.

Give each opportunity a useful record

Record the name, available contact information, source, relevant interests, conversation notes, current stage, and next step with a date. Include communication preferences and requests to stop contact. A person's presence in the database is not permission for every type of marketing. Do not invent identifying details for visitors who decline to share them.

Use the six pipeline stages

- New lead: an inquiry, introduction, registration, or new contact. Your goal is to make contact quickly.
- Contacted: you have spoken, introduced yourself, and begun learning the person's needs. Clarify timeline, motivation, readiness, and next steps.
- Nurturing: the person is researching or not ready yet. Provide relevant information and agree on suitable follow-up.
- Active client: you are serving a buyer, seller, investor, or landlord through the applicable company process.
- Closed: the transaction is complete. Continue the relationship and post-closing service.
- Lost or inactive: plans changed, a move was postponed, or another agent was selected. Record the situation accurately and respect the person's wishes.

These are pipeline concepts for organizing follow-up. Use the appropriate labels and company procedures in your system. An inquiry alone does not establish an agency relationship or an active client engagement.

Follow up promptly and specifically

The company recommends responding to online leads immediately or as soon as reasonably possible, referrals the same day whenever possible, open house visitors within 24 hours, and past-client inquiries promptly. These are recommended response standards, not a promise that every inquiry will convert.

Replace "stay in touch" with "send the requested market information today and call next Tuesday at the agreed time." Review due and overdue actions daily. When plans change, update both the stage and the next action. A request to stop contact should change your plan, not trigger another marketing reminder.

Put it into practice

Review five opportunities. Can you identify the source, last meaningful interaction, stage, and dated next step for each? Correct the gaps before adding another round of outreach.

Check your understanding

Does sending an unanswered message prove a lead has reached the Contacted stage?

Suggested answer: No. Distinguish attempted contact from an actual conversation. Record the attempt and keep the stage accurate.

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3 Develop relationships and referrals

Your sphere of influence, or SOI, is the network of people who know you and may seek your help or introduce you to someone else. Familiarity and an existing relationship can make the first conversation easier. You still need to earn confidence through competent advice, communication, and follow-through.

Use the four part relationship system

- Meet people through community groups, local businesses, professional networks, events, volunteering, and open houses.
- Build relationships through conversations, shared interests, meetings, and genuine attention to what people tell you.
- Stay connected through useful information, personal check-ins, appropriate milestone notes, and thoughtful social media engagement.
- Deliver excellent service when a need arises. Communicate clearly, act professionally, and keep your commitments.

Offer relevant help

Useful help might include a market update, a vendor resource, homeownership information, community news, or an explanation of the buying or selling process. Match the offer to the person's interest. A short answer to a real question is often more useful than an unrelated promotional message.

For example: "You mentioned you might move next year. Would a summary of recent sales in your area be useful?" If the person agrees, deliver it and ask whether they would like another conversation. If there is no real estate need, the relationship can continue without a sales request.

Invite introductions naturally

You can say: "If someone you care about has questions about real estate, I'd be happy to help. Please feel free to introduce us." Make the invitation low pressure and use truthful language about your experience. A new agent should not claim to have built a career through referrals.

Professional referral relationships also require reliability. Learn what the other professional does, make appropriate introductions, and serve anyone they introduce carefully. Follow company and program requirements for any referral arrangement rather than assuming an informal introduction settles compensation.

Review relationships over time

Track meaningful SOI conversations, new introductions, referrals received, and repeat clients. Do not judge a friendship by whether it produces a transaction this month. Relationships often develop over long periods, and attention should be useful and welcome.

Put it into practice

Select five people you already know and one professional contact. Write a genuine reason to reconnect with each, a useful question, and a possible offer of help. Schedule individual outreach and record any promises afterward.

Check your understanding

A friend says they have no moving plans. Has the conversation failed?

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Suggested answer: No. Listening and maintaining a genuine relationship are worthwhile. Do not manufacture urgency or turn every interaction into a referral request.

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4 Respond to broker sponsored and digital leads

Digital inquiries may come from people who do not know you, are comparing agents, or are early in their research. Respond promptly, identify why you are contacting them, and learn what they need. The goal is to develop a trusted relationship from the initial inquiry.

Understand the program before participating

Examples such as Opcity, broker-sponsored websites, company marketing, referral partnerships, social media, landing pages, and property search registrations. IDX refers to property search listings displayed through participating real estate websites. A registration is an opportunity to make contact, not evidence that a person is ready to transact.

Access and participation may be mandatory, optional, or invitation-based depending on the program, experience, and company policy. Compensation, fees, and participation requirements are governed by the Independent Contractor Agreement, Schedule A, company policies, and applicable third-party agreements. Ask the broker to resolve questions.

Recognize the broker lead workflow

Opcity is an example in which a consumer requests information, the agent receives a notification, accepts the opportunity, and connects with the consumer. Follow the applicable program's actual instructions. Confirm your availability to respond and learn what reporting is required; do not assume every program operates identically.

Make the first conversation useful

Introduce yourself and connect your message to the inquiry: "Hi Taylor, this is Alex with List n Show. I'm following up on your request about the property on Main Street. What information would be most helpful?" Use accurate details rather than implying an inquiry the person did not make.

Ask what prompted the inquiry, whether they are buying or selling, their timing, and their questions. When relevant, discuss financing preparation and whether they are already working with an agent. Listen before proposing the next step and follow company procedures for representation.

Record and follow through

Enter the source, stage, needs, and follow-up schedule in the CRM. If immediate conversation is not possible, acknowledge the inquiry through an appropriate available channel and explain when you will follow up. Provide property information, education, or resources relevant to the person's needs. Avoid excessive or unwanted contact.

Some programs involve referral fees, revenue sharing, or commission participation. You are responsible for understanding the arrangement, disclosing transactions to the company, entering required RBO information, and ensuring fees are processed correctly. No specific fee rate is established by this guide.

Put it into practice

Draft an initial response and three discovery questions for a property inquiry. Add the CRM entries you would make and the program questions you must resolve before accepting leads.

Check your understanding

Can you assume a company-generated lead has no referral fee?

Suggested answer: No. Review the governing agreements and confirm unclear terms with the broker. Track the source and processing requirements accurately.

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5 Build geographic and community presence

Geographic farming means serving and communicating with a defined area consistently over time. The purpose is to become familiar, useful, and credible through local knowledge and participation. One mailing or short advertising burst is unlikely to establish that relationship by itself.

Choose an area you can serve well

Start with a neighborhood, subdivision, condominium community, ZIP code, or other manageable market area you know or have reason to learn. Consider existing relationships, travel and event time, communication costs, local knowledge, and your ability to follow up. Start small enough to sustain the work before expanding.

The company also discusses communities and people with shared needs or interests, such as professional groups, investors, or first-time buyers. Use approved approaches and company guidance when defining an audience. Do not treat a group's membership as automatic permission to market to its members.

Create a consistent mix of useful activity

- Market information: recent sales, inventory, days on market, pricing trends, and explanations of what the figures mean.
- Community information: local events, businesses, projects, and practical homeownership resources.
- Personal presence: volunteering, civic participation, networking, community gatherings, and appropriate sponsorships.
- Local conversations: open houses, introductions, and personal outreach when welcome and appropriate.

Direct mail and social media can support this work. A simple recurring market update or seasonal maintenance guide may be useful. Use listed or sold announcements to inform people, and describe your role accurately. Check the reliability, geography, and date of market information before sharing it.

Develop dependable local knowledge

Learn property trends, local businesses, parks, transportation, public information about schools, and community developments. Distinguish confirmed facts from proposed projects or your own interpretation. When you do not know an answer, identify a reliable resource and follow up rather than guessing.

Measure more than distribution

Track what you delivered, time and cash spent, conversations, new relationships, inquiries, consultations, and resulting business. Content views and mailed pieces measure exposure; they do not prove trust or client engagement. Review whether your effort is becoming more useful and recognizable over time.

Put it into practice

Choose one potential farm. Write why it fits, the useful information you can provide, a monthly communication idea, one community activity, and a realistic time and spending limit. Decide what evidence you will review after the first month.

Check your understanding

A large mailing generated no immediate listing. Should you conclude that the area cannot work?

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Suggested answer: No. Review the message, audience, consistency, cost, response, and follow-up. Farming is a longer-term effort, but it still needs a sustainable budget and periodic review.

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6 Approach expired cancelled and owner listings

Expired listings, cancelled listings, and homes offered For Sale By Owner can create opportunities to help homeowners. Approach the person's circumstances with curiosity. A listing status or marketing choice does not tell you everything about their goals, representation, or willingness to speak with you.

Understand the differences

- Expired listing: the listing term ended without a sale. The owner may still want to sell, may be disappointed, or may have changed plans.
- Cancelled listing: the listing ended early or was removed under the applicable arrangement. The reason may involve timing, personal circumstances, or a change in strategy.
- For Sale By Owner, or FSBO: the owner is marketing the property without listing representation. They may value independence, wish to manage costs, or have experience with the process.

Use approved prospecting practices

The company expects agents to follow MLS rules, Do Not Call regulations, applicable state and federal laws, and homeowners' wishes. Do not misrepresent yourself or company services, pressure people, disparage competitors, or continue contacting someone who asks you to stop. Confirm the appropriate approach with the broker when representation or contact eligibility is unclear.

Ask before proposing a solution

A useful opening might be: "What are your plans for the property now?" or "Would it be helpful to review recent market information?" Listen to the answer before offering pricing analysis, presentation ideas, timing information, or an explanation of your process. Make only claims you can support.

Avoid saying "Your agent failed" or promising a sale within a fixed number of days. You may not know the prior instructions, strategy, condition, or market circumstances. Focus on what you would examine and how you would communicate, rather than criticizing another professional.

Respond to concerns without arguing

If an owner wants to save commission, you might say: "I understand managing costs matters. If you would find it useful, I can explain my services and how I approach the selling process." If they had a poor prior experience, invite them to explain what they would want handled differently. If they are not ready, respect that timing.

Make follow up appropriate to the person

Where further contact is appropriate and welcome, agree on a useful next step: requested sales information, a future conversation, or another resource. Record the source, needs, preferences, and next action. A request to stop takes precedence over a prospecting schedule.

Put it into practice

Write a brief opening for an expired listing owner and a FSBO owner. For each, include an open question and a specific offer of information. Identify what you must verify before making contact and how you will record a request to stop.

Check your understanding

Does an expired or cancelled status automatically justify contacting the owner in any way you choose?

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Suggested answer: No. Follow company practices, applicable rules, representation considerations, and the homeowner's wishes. Ask the broker when the appropriate approach is unclear.

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7 Use open houses to build relationships

An open house can help market the property and introduce you to buyers, neighbors, future sellers, and community contacts. Serve the seller and present the home professionally while giving visitors a useful, welcoming experience.

Prepare the property and your information

Review the asking price, property features, improvements, taxes, HOA information, utilities, and relevant comparable sales. Learn useful neighborhood information such as transportation, parks, businesses, and community projects. Verify facts and be clear when an answer needs confirmation.

Arrive early, follow property access and company safety procedures, prepare brochures, check presentation, and arrange approved signage. Coordinate the event with the listing and company requirements.

Welcome visitors and listen

Start with a simple greeting and question: "Welcome. What brought you out today?" Let the person settle in rather than immediately asking a series of qualification questions. As the conversation develops, learn about their interests, timeline, and any existing representation through the appropriate company process.

Welcome neighbors as well as buyers and invite their market questions.

Explain why you request contact information

You might ask: "Would you like information on similar properties?" or "Would a neighborhood market update be useful?" Explain the purpose, ask politely, and respect the decision. Use the company's approved visitor information process without pressuring people into ongoing marketing.

Enter the contact information visitors provide into the CRM, along with the property, date, interests, source, and agreed follow-up. Record meaningful interactions accurately; do not invent details when a visitor declines to identify themselves.

Follow up within the recommended window

The company recommends follow-up within 24 hours. Personalize it: "Thank you for visiting Main Street. Here is the information on similar homes you requested. Would a brief conversation later this week be useful?" For a neighbor, offer the specific market information they wanted. Keep the message brief and helpful.

Review the event and the follow through

Track visitors, meaningful conversations, contacts shared, agreed follow-up, consultations, and later opportunities. Count a future consultation when it is actually agreed, not merely because someone toured. Review preparation as well as the property outcome.

Put it into practice

Prepare a one-page open house plan with property facts to verify, materials, safety and setup tasks, two opening questions, a contact-information invitation, and time reserved for next-day follow-up.

Check your understanding

A visitor is just a neighbor and does not want updates. What should you do?

Suggested answer: Welcome them, answer appropriate questions, and respect their choice. Do not treat their attendance as consent to a marketing sequence.

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8 Plan and review your pipeline

A pipeline review connects today's activity to potential future business. Look at both actions you control and outcomes that take time. Conversations, consultations, active clients, pending transactions, closings, and referrals tell you different things; do not substitute one measure for another.

Review the pipeline every week

Count new leads, SOI conversations, buyer consultations, listing appointments, active buyers and sellers, pending transactions, and referrals. Review individual opportunities for current stages and next actions. Identify overdue promises and prospects whose circumstances have changed. Separate actual conversations from contact attempts.

Define conversion before comparing it

Use consistent stages and a defined group of opportunities. Conversation-to-consultation conversion is the number of those conversations that lead to consultations divided by the number of conversations in the group. Track consultation-to-client and client-to-closing conversion separately. Record the underlying counts and allow time for outcomes to develop.

Illustration only: if 40 conversations produce 8 consultations, the conversation-to-consultation rate is 20 percent. If those 8 consultations produce 4 clients, that rate is 50 percent. If those 4 clients produce 2 closings, that rate is 50 percent. These are hypothetical figures, not company benchmarks or forecasts.

Work backward from a goal carefully

Using only those illustrative rates, a goal of 12 closings would imply 24 clients, 48 consultations, and 240 conversations across the full progression. This is planning arithmetic, not a promise or a timetable. Use your own observed results, capacity, market conditions, and the delay between first contact and closing.

Compare sources and costs

Review results by source so you can decide where to spend more or less time. Include advertising, printing, event costs, applicable program fees, and the time spent following up. Referrals and past clients may have low direct acquisition costs, but relationship maintenance still takes time and effort.

Avoid abandoning a source solely because a small recent group has not closed yet. Check response quality, follow-up completion, timing, spending, and later-stage progress. Diversify thoughtfully so one program or partner does not determine your entire opportunity flow.

Turn annual goals into weekly habits

At least annually, consider closings, commission goals, listings, buyers, referrals, community participation, and work-life balance. Break the plan into monthly goals and weekly activity. Review progress monthly and choose one change at a time so you can learn what helped.

Put it into practice

Choose one source and review its actual counts, time, spending, and next steps. Write one improvement for next week and what you will measure. If you lack enough history, begin collecting a baseline rather than inventing a conversion rate.

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Check your understanding

Can you divide this month's closings by this month's new leads and assume it measures those leads' conversion?

Suggested answer: No. The closings may come from earlier leads. Follow a defined group through the stages and account for timing.

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Your first 30 days

Use this starter plan to establish a sustainable routine. The suggested exercises below are learning activities, not company production quotas. Continue meeting current client obligations and the response recommendations for actual inquiries throughout the month.

Week 1 Organize and choose your sources

Audit existing leads and contacts in your CRM. Confirm source, stage, notes, and next action. Resolve overdue promises and note communication preferences. Choose a relationship activity and one additional source that fit your capacity. Confirm any program or outreach questions with the broker before using a new channel.

Completion check: priority opportunities have clear next steps, and your calendar contains time for both outreach and follow-up.

Week 2 Start conversations and keep commitments

Reconnect individually with people you know, respond promptly to assigned inquiries, and deliver the information you promise. Practice discovery questions that clarify needs and timing. Record conversations accurately and schedule agreed follow-up. Review what people actually found useful.

Completion check: your activity records distinguish attempts from conversations, and promised actions are completed or clearly scheduled.

Week 3 Add one repeatable activity

Prepare an approved open house, a manageable farming activity, a referral-partner conversation, or an appropriate prospecting session. Use the relevant section's preparation steps. Decide in advance how you will record contacts, follow up, and review results. Keep the scope within your available time and budget.

Completion check: the activity has a purpose, a preparation checklist, a follow-up process, and a review date.

Week 4 Review and adjust

Review the pipeline, response habits, overdue tasks, conversations, consultations, costs, and source information. Identify one bottleneck: late responses, weak records, unclear next steps, or activities that exceed your follow-up capacity. Adjust that part of the system and set the next month's schedule.

Completion check: you know what to continue, what to change, and what evidence you still need before judging results.

Keep a practical weekly rhythm

Reserve outreach time, time to complete promised follow-up, and a pipeline review. Use the review to reconnect activity with real people and decisions: Who needs information? Who has a consultation scheduled? Who wants to wait? Which opportunity needs broker direction?

Use List n Show's CRM and RBO systems, training, Transaction Coordination, broker oversight, compliance support, and marketing resources as available. Keep responsibility for your relationships, truthful communication, and professional follow-through central to the routine.

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Lead Generation Systems

Worksheets and readiness review

Copy these prompts into your notebook or approved CRM workflow. Keep the completed plan simple enough to use during a weekly review.

Lead source plan

Source and people I intend to serve: _____

Useful activity and frequency: _____

Time and spending limit: _____

Program or company requirements to confirm: _____

How contacts enter the CRM and receive follow-up: _____

Review date and evidence I will examine: _____

Opportunity record

Name and contact information provided: _____

Original source and date: _____

Needs timing and relevant conversation notes: _____

Current pipeline stage: _____

Communication preferences and any stop request: _____

Next action with purpose and due date: _____

Weekly scorecard

Record contact attempts, meaningful conversations, new leads, consultations agreed, active clients, pending transactions, closings, and referrals as separate counts. Note time spent, direct costs, follow-up completed, and overdue promises. Review by source where possible.

Readiness scenarios

1. A website registrant says they may move next year.
Record the source and needs, provide useful requested information, and agree on suitable nurturing follow-up. Do not assume an immediate client relationship.

2. A homeowner asks you to stop calling.
Record and honor the request. Do not continue a scheduled prospecting sequence.

3. An open house produces conversations but no offer.
Review visitor needs, agreed follow-up, consultations, and later opportunities as well as the property outcome.

4. One lead source produces most of your business.
Maintain its service quality while developing another manageable source and tracking the time and cost involved.

Your next commitment

One action I will complete today: _____
My next weekly pipeline review: _____
One improvement I will evaluate next month: _____

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