1. Lead Capture & Source Control

Can you see where every lead comes from?

☐ Website and IDX leads flow into one system
☐ Paid ads (Google, social) are tracked and tagged
☐ Referral leads are logged consistently
☐ Phone calls and texts are captured automatically
☐ No leads live only in inboxes or spreadsheets

If unchecked: You can’t fix what you can’t see.

2. Speed-to-Lead Readiness

How fast does a lead hear back?

☐ New leads get an automated response immediately
☐ Agents are alerted instantly when a lead is assigned
☐ Missed calls trigger an automatic text-back
☐ Response time is tracked and visible
☐ Ownership is clear within the first 5 minutes

If unchecked: Faster brokerages are winning your deals.

3. Agent Assignment & Accountability

Do leads land with the right agent every time?

☐ Clear routing rules exist (round-robin, ISA, specialty)
☐ Every lead has a single owner
☐ Follow-up expectations are documented
☐ Activity is logged automatically
☐ Leadership can see who is and isn′t engaging leads

If unchecked: Accountability becomes guesswork.

4. Pipelines & Deal Visibility

Can leadership see the real pipeline?

☐ Standardized pipeline stages across the brokerage
☐ Active, pending, and closed deals are clearly separated
☐ Deals don′t stall without visibility
☐ Notes and communication live in one place
☐ Agents aren′t tracking deals ″their own way″

If unchecked: You don’t have a pipeline — you have opinions.

5. Follow-Up Automation

Is follow-up consistent without chasing agents?

☐ Automated follow-ups exist for new leads
☐ Long-term nurture is in place
☐ Appointment reminders are automatic
☐ Follow-up doesn′t depend on agent memory
☐ The system works even after hours

If unchecked: Good leads quietly go cold.

6. Reporting & Leadership Insight

Do you have real operational visibility?

☐ Leads by source are visible
☐ Response times by agent are tracked
☐ Conversion rates are measurable
☐ Pipeline health is clear at a glance
☐ Reports are reviewed regularly

If unchecked: Growth decisions are being made blind.

7. System Consolidation

Are tools helping — or slowing you down?

☐ CRM, texting, email, and pipelines are integrated
☐ Agents aren′t switching between multiple systems
☐ Duplicate tools have been eliminated
☐ The system supports growth without adding staff
☐ Training and adoption are manageable

If unchecked: Complexity is costing you time and money.

Your Readiness Score

✓ **0–10 checked** → CRM is not ready to scale
✓ **11–18 checked** → Foundation exists, gaps remain
✓ **19–25 checked** → Strong system, optimization needed

What This Means

A CRM isn't about features.
It's about **structure, ownership, and visibility**.

If your brokerage isn't fully ready, the fix isn't more software — it's better system design.

Next Step (Soft CTA)

Want to know exactly what to fix first?

Book a Brokerage CRM Blueprint Call
We'll review your setup, identify gaps, and map a clean Lead-to-Close system for your brokerage.