CRM Implementation Checklist ✔️

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CRM IMPLEMENTATION CHECKLIST

A reliable CRM helps you keep relationships alive and deals flowing. With the right system in place, you'll never lose track of leads, tasks, or follow-up reminders again—unlocking real estate success with consistency and focus.

1. Pre-Setup Decisions

- [ ] Determine your budget (monthly or annual subscription? Free vs. paid tiers?)
- [ ] Identify must-have features (e.g., email integration, contact segmentation, analytics)
- [ ] Decide on deployment method (cloud-based CRM vs. local install)
- [ ] Set your data import format (CSV, Excel, or from email contacts)
- [ ] Identify data sources (existing spreadsheets, email accounts, networking event lists)

2. CRM Setup Steps

- [ ] Choose a CRM software (compare top options, read user reviews, assess support resources)
- [ ] Assign user roles & team permissions (giving the right access to your admin or agents)
- [ ] Customize contact fields (e.g., lead source, property preferences)
- [ ] Segment your leads into categories (buyers, sellers, investors, past clients, etc.)

3. Automation & Workflows

- [ ] Set up new lead notifications (SMS/email alerts when a new lead enters your funnel)

- [ ] Create simple drip campaigns (automated welcome emails, or regular check-ins)

- [ ] Decide on deployment method (cloud-based CRM vs. local install)

- [ ] Implement task reminders (e.g., call follow-ups, documents needed, open house schedules)

- [ ] Run short test sequences to ensure everything triggers correctly

4. Ongoing Maintenance

- [ ] Weekly data cleanup (remove duplicates, correct typos, update client status)

- [ ] Monthly feature updates and system checks (review new CRM functionalities)

- [ ] Quarterly or yearly deep-dive (evaluate CRM efficiency, consider adding integrations)

- [ ] Track user adoption within your team, provide ongoing training as needed

5. Conclusion

A CRM isn't a set-it-and-forget-it tool. Rather, it's a discipline: the more consistently you log, update, and automate, the more you keep those critical names and details on your lips. Adopting these best practices now ensures a structured flow of leads, deals, and follow-ups, setting you up for long-term resilience in real estate.

ABOUT LUCAS

DR. LUCAS ROOT, PH.D.

Lucas is a renowned technologist, community builder, and advocate for ethical AI integration. With a robust background in physics, mechanical engineering, and mathematics, he blends technical expertise with a deep understanding of human systems. As the CEO of SGIC Consulting, Lucas has guided countless businesses toward innovation, empowering leaders to leverage technology for meaningful transformation. As host of the Elements of Community podcast, Lucas explores the art and science of building thriving communities, while his groundbreaking work in AI and sustainable business practices has earned him recognition as a thought leader in ethical AI integration and leadership development.