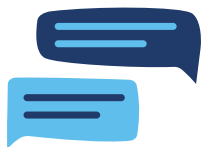


# Our top 9 Prospecting workflows

for estate agencies and  
property businesses



## Need help or have a question?

You can reach our UK team at  
[uksales@rexsoftware.co.uk](mailto:uksales@rexsoftware.co.uk)



Powerful property CRM and marketing workflow automation  
[rexsoftware.com](https://rexsoftware.com) · [rexsoftware.co.uk](https://rexsoftware.co.uk)

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## CHAPTER 1

**Your next  
instruction  
is already  
sitting in your  
database.**

**Prospecting is the lifeblood of any agency. Getting it right delivers agency growth, stability, team engagement and good times for all. Getting it wrong (and missing opportunities) is painful for everyone.**

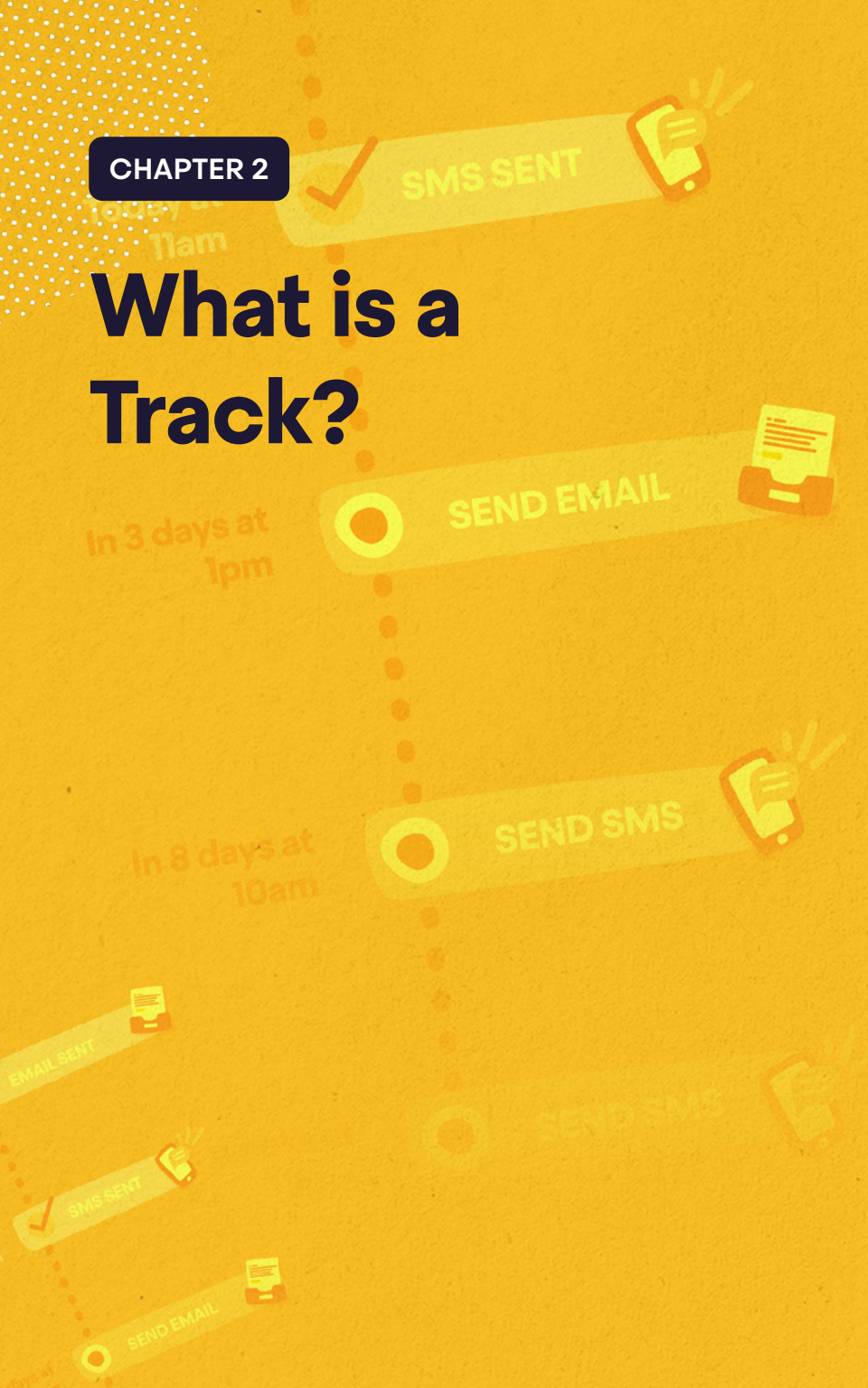
**10 years ago when we started the build of Rex CRM its goal wasn't just to create an effective database of people and properties. We wanted to build a system to provide the platform for lifelong relationships with property owners. That mission hasn't changed. We still have a laser focus on ensuring Rex optimises every contact you make and ensures you never again have to see known contacts sign instructions with a competitor.**

From our native integration with Land Registry (UK) to our unique communication workflows (**Tracks**) that can be set up to ensure every contact or property in your database is receiving consistent, on-brand messages, Rex CRM lets you prospect within your database, and take the pressure off those awkward cold calls or door knocks.

This ebook talks you through the workflows behind our top prospecting Tracks and how these are currently being used by more than 1,500 agencies around the world – including one that has just listed and sold 900 properties in a single year.

## CHAPTER 2

# What is a Track?



**Love or hate them, to-do lists are a great way to stay on track and not miss anything. Checklists are really important when you are engaging with your database.**





In Rex we've taken the idea of a to-do list and turned it into a digital workflow called **Tracks**. They are your roadmap of consistent communication (reminders, SMS, emails & letters) that keep you front and centre in the property owners mind, whatever their status in the sales cycle.

Rex throws down a track of carefully curated reminders that prompt you to take an action after a certain amount of time. In Rex, these appear as pre-defined lists of follow up activities, which can be quickly attached to a property, listing or contact record.

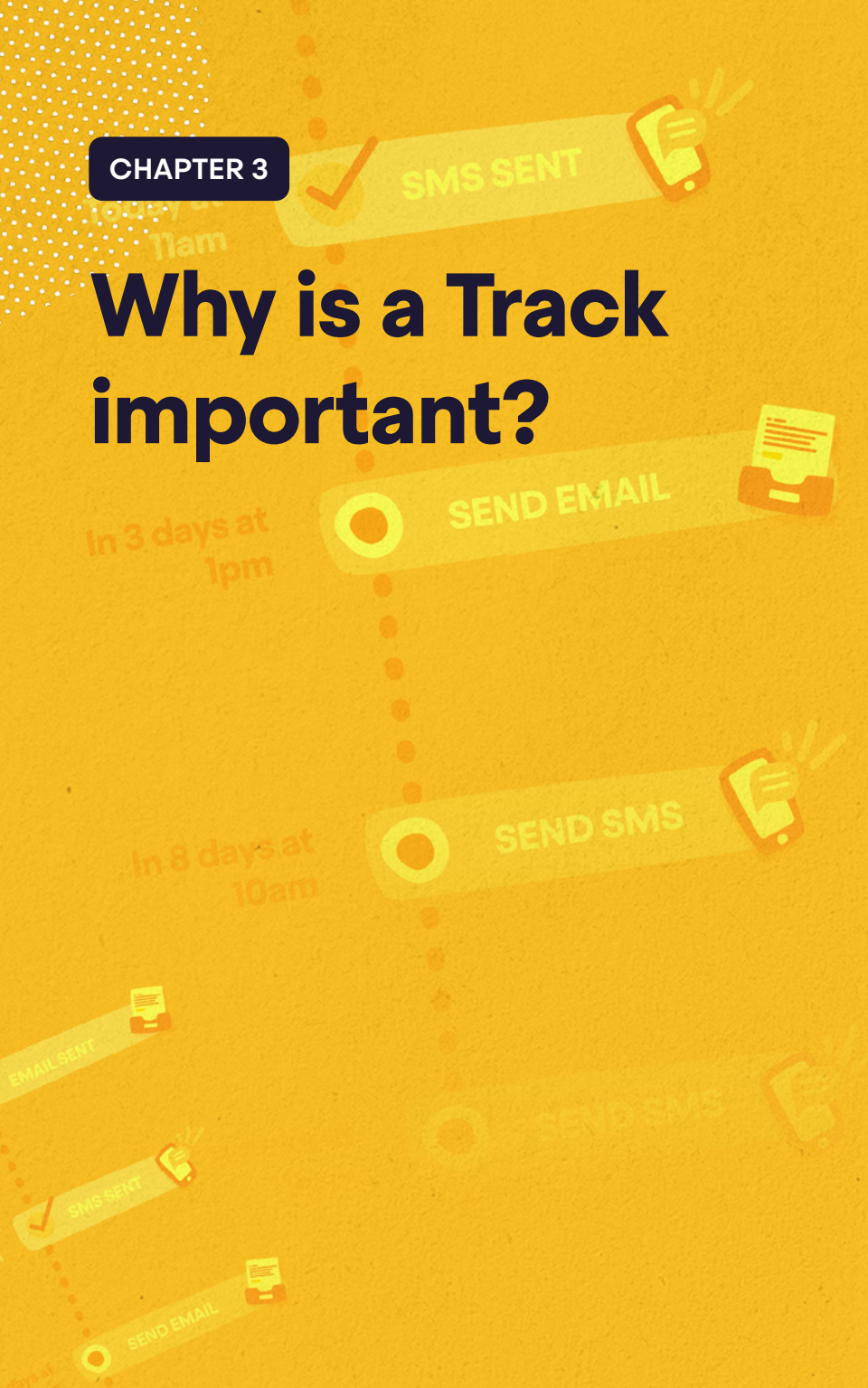
## Not sure what to say?

Don't worry Rex also comes with a bunch of handy pre-written templates that make sure you've got the right content for your scheduled communication. We also understand that you run your business your way, so go ahead – make your own **Tracks**.

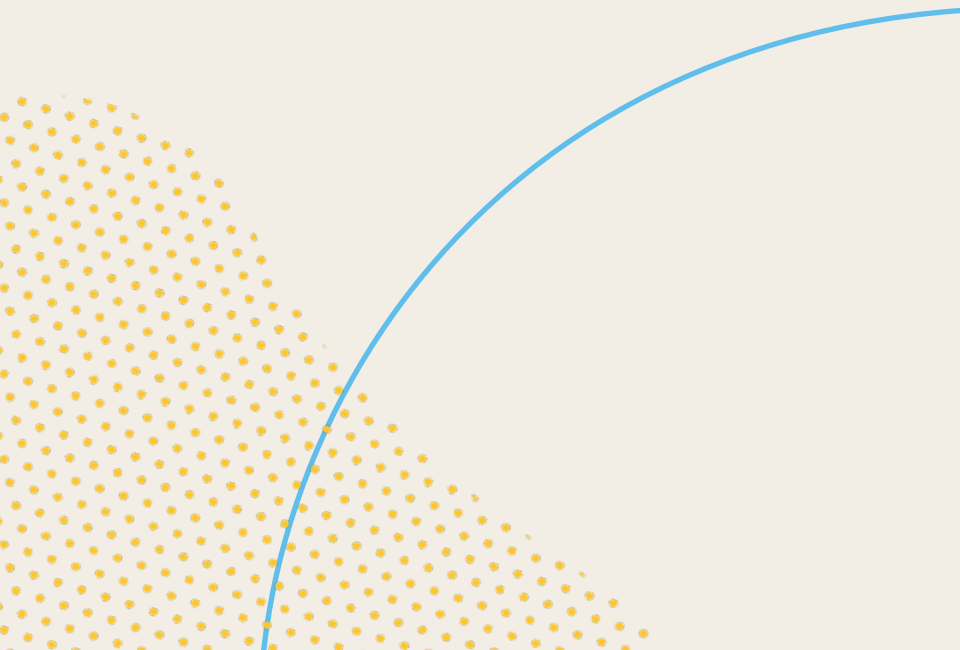
From Cold Prospects, to Valuations to Past Buyers, take advantage of the opportunities to nurture your contacts and build those valuable long term relationships that will see new appraisal requests walking in your door.

## CHAPTER 3

# Why is a Track important?



**In the UK,  
50% of homes  
will come to  
market within  
6 years.**



Let's be honest, if you were looking for someone to sell your house, would you go with the agent who called you once last year and hasn't been heard from since? Or the one who regularly keeps in touch with useful tips and information? When homeowners decide to sell, you want it to be with you. Consistent on-brand communication is key – and we've perfected the follow-up, with Tracks.

Reminders help you build long-term relationships with your clients, automate tasks and save you time. Using the Rex Tracks feature our agents are nurturing contacts and building relationship to create a selling mindset. Instead of approaching prospecting passively, and waiting for someone to sell.

**Did you know only 1 in 8 home buyers will sell with the same agent in the UK?**

**The Tracks in Rex CRM allow you to increase brand recognition for your business, turning buyers into sellers.**

## CHAPTER 4

# Prospecting Tracks



SMS SENT



In 3 days at  
1pm



SEND EMAIL



In 8 days at  
10am



SEND SMS



EMAIL SENT



SMS SENT



SEND EMAIL



SEND SMS



**Rex is a CRM and business generation tool that powers estate agencies to list and sell more properties.**







**We've asked our UK estate agents to share their most useful workflow for prospecting.**

**Here's the top 9 from our pre-set collection.**

# #1: Cold Prospect Track

You meet a homeowner who lives down the street from a house you've just listed, while canvassing door to door. Grab their contact details and add them to this cold prospect Track. It's designed to run for a year, with regular contact every three months.







## Reminders

type	reminder	remind in
	<b>Task</b> Enter details into Rex and set up on Quarterly Newsletter update	1 days
	<b>Letter</b> General prospecting letter of agent's choice	3 months
	<b>Phone</b> Touch base call for status update	6 months
	<b>Letter</b> General prospecting letter of agent's choice	9 months
	<b>Phone</b> Update phone call - offer a free market appraisal	12 months
	<b>Task</b> Add a new track accordingly to status	12 months

# #2: Warm Prospect Track

You meet a homeowner who is in the browsing phase. Grab their contact details and send them a market appraisal to get the track started. It's designed to run for 30 days with contact throughout the month.

## Reminders




type	reminder	remind in
	<b>Task</b> Task - Enter details into Rex and set up on Quarterly Newsletter update (1 day)	1 days
	<b>Letter</b> <small>TEMPLATE</small> Letter - Free market appraisal (1 day)	1 days
	<b>Phone</b> Phone call - Follow Free appraisal letter, if not ready go to next step (1 week)	1 weeks
	<b>Email</b> E-mail - Interested purchaser - specific house letter (4 weeks)	4 weeks
	<b>Phone</b> Follow up - interested purchaser e-mail ask for appraisal (4 weeks)	29 days
	<b>Task</b> Task - Convert to appraisal or listing, add track accordingly ( 4 weeks)	30 days



# #3: Hot Prospect Track

You’ve got a homeowner who is ready to sell. It’s time to give them a call and arrange a valuation. Once you’ve booked in a time update the track dependant on the outcome. A common update would be to appraisal or listing Track.

















## Reminders

type	reminder	remind in
	Task Enter details into Rex and set up on Quarterly Newsletter update	1 days
	Phone Arrange time for appraisal	1 days
	Task Convert to appraisal or listing and add track accordingly	1 days

## #4: Cold Valuation Track

The homeowner has asked you to come in to value the property, they have indicated an interest in selling in the future. This Track ensures you are the first one to know when they are ready. They probably aren't going to sell anytime so add them into this.

















### Reminders

type	reminder	remind in
	Letter TEMPLATE Valuation confirmation - Pre Listing kit	1 days
	Phone Call to confirm an appointment	1 days
	Task SMS - Thank you for Valuation	1 days
	Task Enter details into Rex and cross - match buyers	1 days
	Task Set up on Quarterly newsletter update	2 days
	Letter TEMPLATE Thank you for Valuation (no price)	3 days
	Letter TEMPLATE E-mail We have a buyer letter	3 days
	Phone Follow up e-mail - we have a buyer - ask for business	4 days
	Letter TEMPLATE Newsletter cover letter	1 months
	Task Label on Envelop with Newsletter - Quarterly market update	1 months
	Letter TEMPLATE Just listed letter	2 months
	Letter TEMPLATE Just sold letter	3 months
	Letter TEMPLATE E-mail - We have a buyer letter	4 months
	Phone Follow up "Interested purchaser" e-mail - Ask for business	4 months
	Letter TEMPLATE Market update 3 (cold valuation)	6 months
	Phone Status update	12 months

## #5: Warm Valuation Track

You've just had a great meeting with a homeowner who asked you to come in and determine the value of the property. They like what they hear and will start seriously planning a move in the next 3-6 months. This track will make sure your name is on the top of the list.




### Reminders

type	reminder	remind in
	Task Enter details into Rex and set up on Quarterly Newsletter update (1 day)	1 days
	Letter TEMPLATE Valuation confirmation - Pre-listing kit (1day)	1 days
	Phone Confirm appointment (1 day)	1 days
	Sms SMS - Thank you for Valuation (1 day)	1 days
	Task Enter details to Rex and cross-match buyers (1 day)	1 days
	Letter E-mail We have a buyer letter (1 day)	2 days
	Phone Follow up e-mail - we have a buyer- ask for business (1 day)	2 days
	Letter TEMPLATE Post Valuation Price range (3 days)	3 days
	Letter TEMPLATE Valuation Follow up with Open Home invitation Plus Open Home List and Just listed brochure (2 weeks)	2 weeks
	Letter TEMPLATE Monthly newsletter with Just Sold brochure (3 weeks)	3 weeks
	Phone We have a buyer who missed out on buying the last home we sold - ask for business (3 weeks)	3 weeks
	Email Valuation follow up with list of current sales letter (5 weeks)	5 weeks
	Letter TEMPLATE Not Listed yet (8 weeks)	8 weeks
	Email E-mail Letter 'market update'(1) (11weeks)	11 weeks
	Phone Ask for listing appointment if not change to cold valuation and add activities accordingly (11 weeks)	80 days
	Task Adjust cold Valuation track to allow for conversion from warm Valuation track (11 weeks)	81 days

# #6: Past Sellers Track

It's time to reach out to a past seller to ensure everything is going well, in their new property and to gauge where they are in the sales cycle. They've had a good experience with you, so it's important to stay in touch and continue to build the relationship. Continuous nurturing of past sellers is key when it comes to building and maintaining relationship. By using the Past Sellers Tracks you'll be able to continue nurturing past the sale.








## Reminders

type	reminder	remind in
	Task Quarterly newsletter	3 months
	Phone Touch base to find out how they are settled in new place	6 months
	Task If bought- add reminders accordingly, if renting - ask when they are thinking of buying - add track or reminders accordingly	6 months

## #7: Past Buyers Track

You've just made a sale and have a happy buyer. Now it's time to start a regular contact. Add them to this Track for a light-touch to relationship development. Review where they are in the sales cycle, by looking at your interactions with them and what they are engaging with, and make contact over the next 2 years.












### Reminders

type	reminder	remind in
	Task Set up on Quarterly newsletter update	3 months
	Letter TEMPLATE Card or Letter- One Year anniversary	1 years
	Phone Follow up One year anniversary letter; check status	1 years
	Task If not selling add One year anniversary reminder for next year	1 years
	Letter TEMPLATE Letter - Offer CMA	18 months
	Task Card - Two year anniversary	2 years
	Phone Touch base - check out if thinking of selling and set up activities accordingly	2 years

## #8: Anniversary Track

You have sold a property so get ready to celebrate each passing year. It's important to facilitate a long term deal, for the next time they are in market. This Track runs over 10 years and is great to use in conjunction with other general agency communication. Every year the assigned agent will see in the daily reminders a note to make a personal call to check-in and see how the owner is going.












### Reminders

type	reminder	remind in
	Phone Anniversary call - "Happy anniversary. How's everything going with your property"	1 years
	Phone Anniversary call - "Happy anniversary. How's everything going with your property"	2 years
	Phone Anniversary call - "Happy anniversary. How's everything going with your property"	3 years
	Phone Anniversary call - "Happy anniversary. How's everything going with your property"	4 years
	Phone Anniversary call - "Happy anniversary. How's everything going with your property"	5 years
	Phone Anniversary call - "Happy anniversary. How's everything going with your property"	6 years
	Phone Anniversary call - "Happy anniversary. How's everything going with your property"	7 years
	Phone Anniversary call - "Happy anniversary. How's everything going with your property"	8 years
	Phone Anniversary call - "Happy anniversary. How's everything going with your property"	9 years
	Phone Anniversary call - "Happy anniversary. How's everything going with your property"	9 years
	Phone Anniversary call - "Happy anniversary. How's everything going with your property"	10 years

# #9: Selling with Online Agent Track #1

You see a homeowner attempting to sell their property on their own to save money. As they continue through the sales process they notice how difficult it can be. Now is the opportunity to take the pressure off them. This 95-day program takes you from offering to manage the advertising, inbound enquires and the negotiation process, to winning the instruction.

## Reminders

type	reminder	remind in
	Task Enter details into Rex	1 days
	Letter TEMPLATE Just sold house in your area - "When others are talking, we're selling"	1 days
	Letter TEMPLATE Professionals Sells homes for more	3 days
	Letter TEMPLATE Free Valuation offer	14 days
	Letter TEMPLATE Just listed a house in your area	20 days
	Letter TEMPLATE Top 8 Tips to prepare for viewings	30 days
	Task Door knock or phone call - ask if your information was helpful and if they need any help? Invite for some of your Open Homes, get an e-mail address	40 days
	Letter TEMPLATE Conducting an open for inspection	60 days
	Letter TEMPLATE Paying a lower Commission/Fixed fee May Not Save Money	75 days
	Letter TEMPLATE The biggest mistake when selling with online agents	90 days
	Task Door knock or make phone call - Ask for business	95 days

## **Want to see how Rex can nurture your database contacts and deliver you instructions without cold calling?**

Our built-in tracks are just on the prospecting tools inside Rex CRM. All new Rex accounts have access to 31 pre-defined, ready-to-go tracks. You can use as-is or you can start to customise to do estate sales your way. Agencies using Rex often start with the basics but every quickly see the opportunities to create their own bespoke processes.

To find out more about how Rex CRM can drive both valuation and listing opportunities talk to our UK sales team. Give Mark and the team a call on [020 3885 2778](tel:02038852778) or email [uksales@rexsoftware.com](mailto:uksales@rexsoftware.com) and we'll set up a time to walk you through all problems Rex is solving for UK sales offices.



Today at  
11am



SMS SENT



In 3 days at  
1pm



SEND EMAIL



In 8 days at  
10am



SEND SMS



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marketing workflow automation**

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