

TEAM LEAD GEN CHECKLIST



Thinking about making the switch to a real estate team?

Ask these 5 questions first to see if your team has what it takes to convert leads and support its agents in today's competitive market.

1 Does the team provide strong support for its agents?

According to Josh Harley, Founder and CEO, Fathom Realty, Plano, TX, a well-run, supportive team will handle 70% of an agent's admin work, freeing the agent's time to build new relationships while justifying a higher team split.

Is your team providing its agents with a regular supply of solid, relevant leads? Also, is there proper admin support to allow the agent to capture new business?

Successful team leads support their agents with training, client services and comprehensive marketing services such as social media, fliers, digital ads, email campaigns and listing updates.

2 Is your team lead not just generating leads but generating qualified leads?

A productive team will have the systems and tools in place to generate solid, informed leads, such as those based on customers' recent online search behavior. The team should empower the agent to be the expert in their field by supplying the right training, data and target metrics.

3 Does your team help facilitate cross-networking opportunities with other industry professionals?

Peer professionals from the mortgage, lending, moving and building trades offer a valuable lead source, and teams can help broker those relationships by leveraging their collective social network. A supportive team will often bring many of these professionals together on one collaborative platform such as dotloop to foster ongoing communication between the various entities.

4 Does your team lead demonstrate strong leadership skills?

Is every agent made aware of the team's goals, objectives and KPIs? Does every TC, admin, buyer's agent and listing agent fully understand their role and the metrics used to measure their success? Does management regularly check in and track agents' lead productivity and ROI?

Top teams regularly tag, track and adjust their agents' lead sources to optimize their lead gen mix. In fact, consulting firm T3Sixty found a strong correlation between conversion rates and the level of management. While organizations that sent leads to individual agents converted at around 1% or less, those which held weekly accountable meetings and had complete systems in support converted five times higher.

Dotloop for Teams and the **Business+** platform can help teams tag transactions with the lead source and create reports that identify which channels are generating the best quality leads.

5 Does the team offer a strong CRM and transaction management system for capturing, tracking and converting leads into closings?

Dotloop integrates with a number of CRMs to quickly capture new leads and convert them into transactions while eliminating duplicate data entry. Some of these integrated CRMs offer IDX features that monitor client search activity on an agent's site then stream the lead into the database. Others encourage friendly team competition by displaying the team members' sales rankings. View dotloop's [complete portfolio of 75+ integrations](#) with CRMs, marketing and automation, and backend/accounting systems.

