

Houseful follow-up cheat sheet

Immediate follow up (within 24 hours)	• Send a thank-you message (email or text) and provide recap of discussion • Share introductory materials (bio, guide, testimonials, video)
Prepare for in-person meetings or showings	• Confirm appointments and send reminders • Prepare materials and talking points and gather feedback after meetings/showings
Qualify the client during in person meeting (1-2 days after contact)	• Confirm financing status (pre-approved or lender referral)
Set up a customized plan (2-5 days after contact)	• Create property search or listing strategy (MLS/CMA) • Send initial listings or market data
Maintain regular communication (weekly or as needed)	• Send weekly check-ins (email, call or text) • Share value-added content (neighbourhood info, market trends, etc) • Track listing engagement and tailor accordingly
Personal touch points (ongoing)	• Celebrate milestones (birthdays, anniversaries, etc.) • Send occasional personalized video messages
Continue nurturing (if not ready yet)	• Add client to an automated drip campaign • Set monthly or quarterly check-ins