

Client follow-up and drip campaigns

This workflow automatically nurtures real estate leads through personalized email drip campaigns based on their engagement level and property interests. It increases conversion rates by delivering timely, relevant content that moves prospects through the sales funnel.

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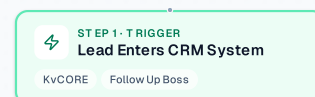
WORKFLOW TRIGGER

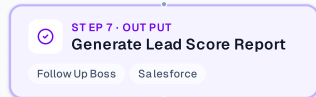
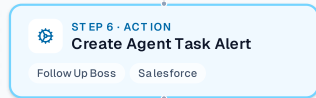
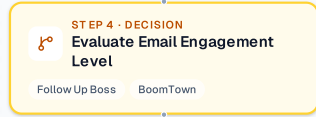


New lead enters CRM system from website inquiry, open house signup, or property search

Visual Flow

Each node represents an automated step. Connections show how data and decisions move through the workflow.





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Step-by-Step Breakdown

Detailed explanation of each automated stage in the workflow.

1

⚡ TRIGGER

Lead Enters CRM System

A new prospect submits contact information through property inquiry, open house registration, or listing search. Their data and interests are captured in the CRM.

2

 ACTION

Segment Lead by Interest

System automatically categorizes the lead based on property type, price range, location preferences, and lead source. Tags are applied for campaign targeting.

Follow Up Boss

KvCORE

3

 ACTION

Launch Initial Welcome Campaign

Sends personalized welcome email with market insights, property recommendations, and agent introduction based on lead's specific interests. Sets up automated drip sequence.

Follow Up Boss

BoomTown

4

 DECISION

Evaluate Email Engagement Level

Monitors email opens, clicks, and responses over 7-day period. Routes highly engaged leads to priority follow-up track and low engagement leads to re-engagement campaign.

Follow Up Boss

BoomTown

5

 ACTION

Send Targeted Content Series

Delivers relevant content based on engagement level - market reports, new listings, or neighborhood guides for engaged leads, broader educational content for others. Continues nurturing sequence.

Follow Up Boss

BoomTown

6

 ACTION

Create Agent Task Alert

Generates priority follow-up task for agent when lead shows high engagement or requests showing. Includes lead summary and recommended talking points.

Follow Up Boss

Salesforce

7

 OUTPUT

Generate Lead Score Report

Produces weekly dashboard showing lead progression, engagement metrics, and conversion-ready prospects requiring immediate agent attention.

Follow Up Boss

Salesforce



Outputs

- Segmented lead database with engagement scores

- Automated email nurture campaigns by interest type

AI Business OS



Key Metrics

- Email open rates by campaign
- Lead-to-appointment conversion rate
- Average time from lead to qualified prospect



Tools & Integrations

- Follow Up Boss
- KvCORE
- BoomTown
- Salesforce

AI Business OS

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