A PRACTICAL FIELD GUIDE FOR US REAL ESTATE AGENTS

The 10-Appointment Month

More leads will not fix a follow-up gap. Start by checking what happens to the leads you already have.

Use this before buying more traffic

Work through one part each day, or use the six pages with your team. You will leave with a clear owner, next action and way to measure the result.

01

Find the missed next step

Review recent inquiries and separate unanswered messages from real conversations.

02

Build a clear handoff

Give each lead an owner, a next action and a due time.

03

Use your own numbers

Include service fees and ad spend before judging the economics.

04

Run a weekly review

Count attended calls and next steps, then fix one gap.

The title describes a planning target. It is not a forecast, guarantee or claim of client results.

01 / FIND THE GAP

Your CRM is not your calendar.

Open your last ten real inquiries. Skip test records and duplicates. Write down what actually happened.

1

Did someone own the lead?

Name one person. A shared inbox does not tell you who is responsible.

2

Did a conversation happen?

A sent text, completed dial or opened email is not proof that the prospect spoke with you.

3

What did the person ask for?

Record their market, need, timing and requested next step. Keep their words beside your summary.

4

Was the next step completed?

Check the actual call, reply or appointment record. Mark missing evidence as unknown.

5

Can the next person act?

Save a short note, the next action and its due time. Someone else should be able to pick it up.

Your first fix: _____

Owner: _____ **Due:** _____

02 / THE LEAD-TO-CALL PATH

A form fill is only the start.

Check these five steps before sending more traffic to the same system.

1

The offer matches the destination

Your ad, form and resource must describe the same thing. Open every link on a phone before it goes out.

2

The contact saves correctly

Keep the right name, source and market. Repeated requests must not erase earlier notes or tags.

3

The requested resource arrives

Test the actual PDF or video. Only promise an email if you have checked its delivery and links.

4

The right person gets the alert

Assign one owner and verify the alert arrived. Avoid duplicate reminders and repeated outreach.

5

The appointment has a real outcome

Separate booked, attended, no-show and rescheduled. A no-show needs a next step, not a lost label by default.

For each step, save one proof: a working page, a CRM record, a delivered message or a call outcome.

03 / CHECK THE ECONOMICS

Gross commission is not profit.

Use your own commission and costs. An illustration can help you check the math, but it cannot predict your results.

1

Net commission per closed deal

Commission retained after brokerage split, referral fees and direct deal costs.

2

Total acquisition cost

Service fees + ad spend + other campaign costs.

3

Break-even deals

Total acquisition cost divided by net commission per deal, rounded up to a whole deal.

4

Acquisition surplus

Closed deals x net commission per deal, minus total acquisition cost. Other business costs and taxes are still separate.

Illustration only. These are not our prices or expected results.

If you retain $6,000 per deal and spend $3,000 in total, one closed deal covers that spend. Zero deals leaves you $3,000 below that spend. Replace both inputs with your own numbers.

Keep close rate and show rate separate. Use actual attended calls when reviewing sales conversion.

04 / YOUR WEEKLY REVIEW

Busy work is not a sales result.

Use one week and one time zone. Keep first appointments separate from follow-ups and reschedules.

1

Review the counts

New inquiries. Real conversations. First appointments booked. First calls attended. No-shows. Proposals. Sales.

2

Find the missing next steps

Review interested replies, overdue tasks and open proposals. Give each one an owner and due time.

3

Review no-shows with evidence

Check attendance and any new booking before changing a stage. Ask about rebooking only when follow-up is appropriate.

4

Choose one improvement

Fix a broken link, slow response or missed handoff. Check the same problem again next week.

A small daily routine

Start with interested replies and calls due today. Protect time for finding new prospects. After calls, check the notes and next action. End the day by clearing overdue follow-ups or naming the blocker.

A resource download is not a qualified appointment. Keep those counts separate.

05 / BRING YOUR REAL LEAD PATH

More software is not the first step.

Start with the place where your current process breaks. Bring that example to a Market Fit Call with Logan.

1

Your market and capacity

Where do you work, and how many new conversations can you handle?

2

One recent inquiry

Show how it arrived, what the person asked for and where the follow-up stopped.

3

Your real costs and outcomes

Bring service fees, ad spend, retained commission and recent attended-call results.

4

The next decision

Discuss whether Elevated fits your need. Get the current scope, price, timing and any guarantee in writing before buying.

Book a Market Fit Call with Logan

View the current Elevated offer

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