AIMOZA

A 15-MINUTE WORKING SESSION

The Lead Follow-Up Checkup

Find the unclear handoff. Give the next inquiry a clear next step.

LEAVE WITH

01 A six-point scorecard for your current process

02 A worked example and adaptable message prompts

03 A one-workflow action plan you can use today

For real-estate teams with inquiries to manage, people to coordinate and follow-up that needs to be visible.

A simple checkup. One practical next step.

Fillable scorecard and worksheet included. Download to save your answers.

01 / FIND THE GAP

Score the process you have.

Pick one recent inquiry or a test example. Trace what happened instead of rating what your tools are supposed to do.

0 Unknown or missing **1 Exists, but inconsistent** **2 Clear and repeatable**

Give each row one score. Use evidence, not confidence.

01 SOURCE

Can you find where the inquiry came from?

Example evidence: original source and received time.

02 RESPONSE

Is the first response owned by someone?

Example evidence: response owner and time recorded.

03 CONTEXT

Is the information for the next step available?

Example evidence: area, intent, timing and relevant preferences.

04 HANDOFF

Does the next person know it is theirs?

Example evidence: accepted task, alert or documented transfer.

05 FOLLOW-UP

Is the next action visible, including exceptions?

Example evidence: owner, due action and opt-out handling.

06 OUTCOME

Can you tell what actually happened?

Example evidence: confirmed booking, attendance or closure.

TOTAL / 12

Start with any row scored 0. If none are 0, choose the weakest 1. A high total still needs live testing.

This is a planning exercise, not a validated benchmark or a prediction of results.

02 / MAKE THE HANDOFF CLEAR

Map one inquiry end to end.

A workflow becomes easier to improve when its trigger, owner, next action and exception path are explicit.

ILLUSTRATIVE EXAMPLE / BUYER INQUIRY

A buyer asks about a property through your website. This is a process-design example, not a demonstration of a configured AIMOZA integration.

01

Trigger

The website accepts the inquiry. Record its source and received time.

02

Clarify

Capture the property or area, the question, timing and permitted contact channel. Ask for missing context.

03

Assign

Name the person responsible for the next conversation. Define a response target your team can actually meet.

04

Act

Send a relevant reply and record the next action. Automate only the steps your team has configured and tested.

Define the exception before it happens.

Missing details? Ask one useful question. Owner unavailable? Route to a named backup. Duplicate inquiry? Reconcile the record. An opt-out or cancellation? Stop the relevant follow-up and update its status.

A configured tool is not proof. Test the normal path and the exception path.

03 / MAKE FOLLOW-UP USEFUL

Give each message a purpose.

These are adaptable prompts for people who have already made an inquiry. Match the channel, permissions, context and timing to the situation.

01 / ACKNOWLEDGE

Confirm what they asked. Ask one useful question.

Hi [First name], thanks for asking about [property/area]. What would be most useful next: property details, answers to a specific question, or a conversation about your plans?

02 / ADD VALUE

Make the next reply easier.

Hi [First name], following up on your question about [topic]. I can send [relevant resource/details] or help clarify [specific point]. Which would be more useful?

03 / CLOSE THE LOOP

Respect timing and preference.

Hi [First name], would you like me to keep helping with [topic], or pause for now? Either is fine. Let me know what you prefer.

Use a clear sender identity and honor channel rules and opt-outs. Agree on a sensible cadence; do not keep sending after a reply, booking or stop request makes the sequence inappropriate.

04 / CHECK REAL OUTCOMES

A click is a clue. A booking is an event.

Use a small funnel to see what people do next. Keep website activity separate from confirmed business outcomes.

100	8	3	2
Article visits	**Call-link clicks**	**Confirmed bookings**	**Attended calls**
Website analytics	Website analytics	Scheduler / CRM	Attendance record

Illustrative numbers only. These are not AIMOZA or customer results.

Ask three questions each week.

01 **Are people taking the next step?**

Compare call-link clicks with article visits. In the example, 8 / 100 = 8%. This is a click-through rate, not a booking rate.

02 **Are consultations really being booked?**

Use successful scheduler records. In the example, 3 bookings and 8 clicks are separate counts; they are not a matched conversion rate unless the journey is reliably linked.

03 **Are those conversations relevant?**

Record attendance and agreed qualification criteria in the CRM. An attended call is not automatically a qualified opportunity or a customer.

WHEN YOU TEST PAID TRAFFIC

Cost per qualified consultation = attributed test spend / confirmed consultations meeting your agreed criteria. With zero qualifying consultations, the rate is undefined.

Respect consent. Keep personal contact details out of website analytics.

05 / CHOOSE YOUR NEXT STEP

Turn one gap into a clear plan.

Choose one weak handoff from your scorecard. Complete this page with the person responsible for the workflow. Use test or redacted information.

WORKFLOW / INQUIRY TYPE

ACCOUNTABLE OWNER

WHAT STARTS THE WORKFLOW?

WHAT IS THE NEXT ACTION?

WHAT HAPPENS IF THE USUAL PATH FAILS?

WHAT EVIDENCE SHOWS IT WORKED?

REVIEW DATE

Test one normal path and one exception.

Bring your map. Discuss the next step.

An AI strategy call about your workflow, tools and implementation needs.

Book an AI strategy call

45 minutes / Pacific time

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