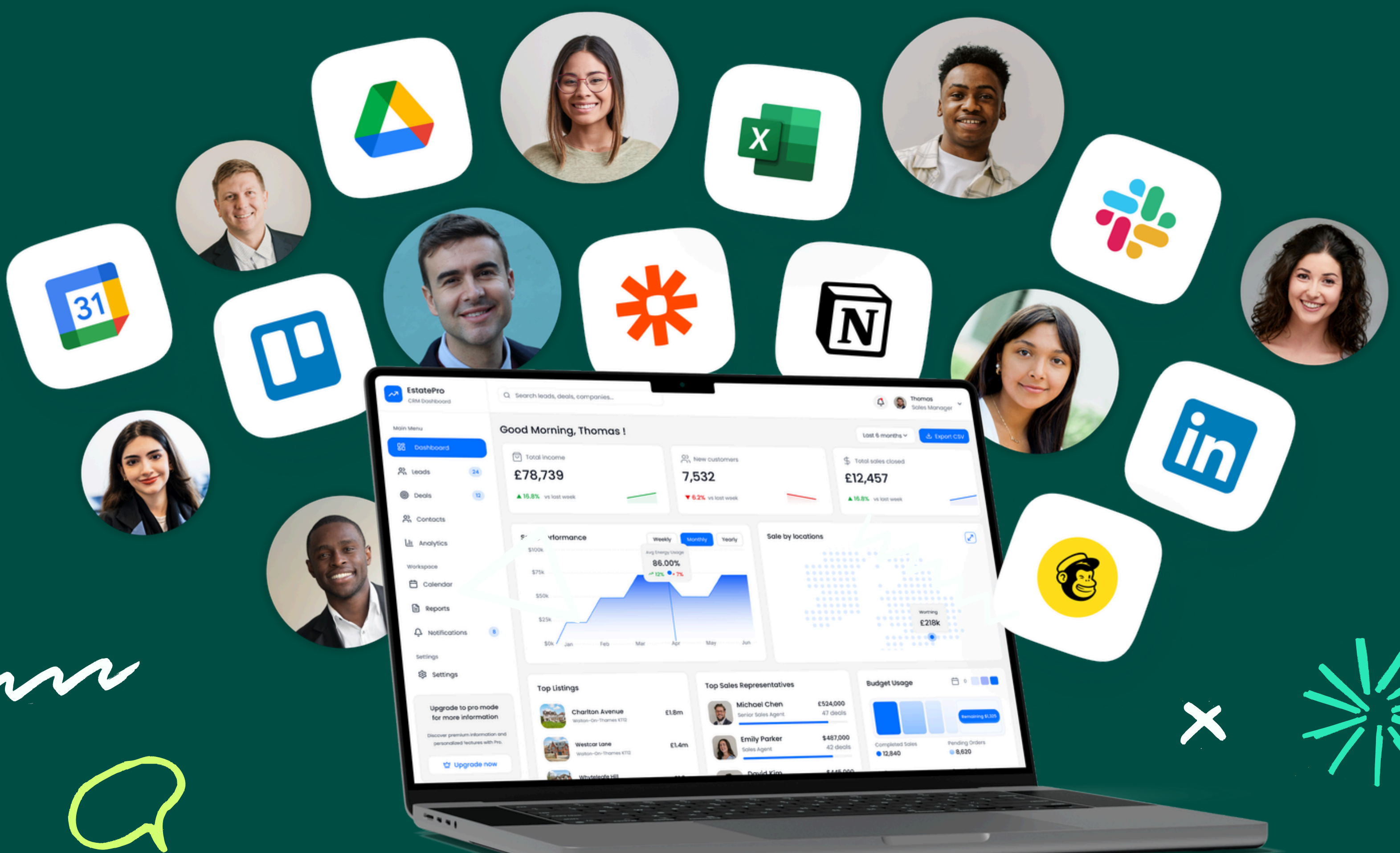
# ESTATE AGENT CRM INTEGRATION CHECKLIST



# EVERYTHING ESTATE AGENTS NEED TO GET THE MOST OF THEIR CRM

Your CRM should be the central nervous system of your agency – the place where every lead, every conversation, and every instruction lives and breathes. But most agencies are running their CRM in isolation, copy-pasting between systems, manually logging calls, and chasing data that should already be there.

This checklist covers the seven areas that make the biggest difference to how well your CRM actually works. Start anywhere, but work through all of it - even ticking off three or four items per section will save your team hours every week.



You'll end up with a score out of 45

**Under 20**
Don't worry. Most agencies start here. A focused 90-day plan can move you to 35+ with the right support.

**20-37**
Good foundations, but there are key improvements still available to you.

**38-45**
You're running a tight, well-integrated operation. The focus now is maintenance and marginal gains.

# DATA FOUNDATIONS

## Get the basics right before anything else

Your CRM is only as good as the data inside it. Before you build workflows, automations, or integrations on top of your existing setup, it's worth making sure the foundations are solid. Bad data compounds – and a clean CRM is a faster one.

- [ ] All active contacts have complete records (name, number, email, property interest)
- [ ] Duplicate contacts have been identified and merged
- [ ] Custom fields reflect how your team actually categorises leads and clients
- [ ] Contact statuses are consistently used across the whole team
- [ ] Old, inactive, or lapsed records are archived rather than cluttering active views
- [ ] Data entry standards are written down and shared with all staff
- [ ] GDPR consent and data retention policies are documented

0 **Score** /7

**Run a data audit before any new integration. Connecting a messy CRM to other systems doesn't fix the mess - it spreads it.**

# COMMUNICATION LOGGING

## Every conversation should live in your CRM

If your team is having conversations that aren't being captured in the CRM - whether that's a call from a mobile, an email from a personal account, or a WhatsApp from a negotiator's phone - you're building a picture of your clients with half the information missing.

- [ ] All inbound and outbound emails are logged automatically against the correct contact
- [ ] Inbound website enquiries are sent to the correct team members
- [ ] Calls made from the office are recorded and attached to the contact record
- [ ] Calls made from mobile devices are also captured, not siloed on personal phones
- [ ] SMS/text communications are logged or at minimum tracked in notes
- [ ] WhatsApp or messaging platform conversations have a logging or export process
- [ ] Team members are not using personal email or phone numbers for client contact

0 **Score** /7

**If your negotiators are calling applicants from their personal mobiles, those conversations are invisible to the business.**

# LEAD & PIPELINE MANAGEMENT

## Know exactly where every lead stands

A CRM without a well-configured pipeline is just an address book. The real value comes from being able to see - at a glance - where every applicant, vendor, landlord, and prospect sits, and what needs to happen next.

- [ ] Pipeline stages are clearly defined and match how your team actually works
- [ ] Every new enquiry enters the CRM within the same day it's received
- [ ] Lead source is recorded for every new contact
- [ ] Stale leads are flagged automatically or reviewed on a regular schedule
- [ ] Tasks and follow-up reminders are created at each stage transition
- [ ] Pipelines are separated by type where relevant (sales, lettings, landlord acquisition)

0 **Score** /6

**If your negotiators are creating their own follow-up systems in spreadsheets or notebooks, that's a sign your pipeline stages or task prompts need rethinking.**

# WORKFLOW AUTOMATION

## Let the CRM do the chasing

Manual follow-up is inconsistent follow-up. The best-performing agencies use their CRM to automate the repetitive but important stuff - so nothing falls through the cracks when the office is busy, short-staffed, or just having a hectic Tuesday.

- [ ] New enquiry acknowledgement is sent automatically within minutes of receipt
- [ ] Viewing confirmations and reminders are automated
- [ ] Post-viewing feedback requests are triggered automatically
- [ ] Landlord and vendor update cadences are automated where appropriate
- [ ] Review or testimonial requests are sent at the right moment without manual effort
- [ ] Sequence open rates and conversion are reviewed and optimised at least monthly
- [ ] Every automation in your CRM has a named owner responsible for reviewing and updating

0 **Score** /7

**Start with one automation e.g. a simple follow up email asking for a review. Nail one before building the next.**

# PHONE SYSTEM INTEGRATION

## Where telecoms and CRM come together

This is where significant time and revenue is either captured or lost. A properly integrated phone system doesn't just make calls – it feeds your CRM automatically, so every conversation is logged, searchable, and actionable without anyone having to do anything manually.

- ☐ Your phone system has a native integration with your CRM
- ☐ Inbound calls trigger a screen pop showing the relevant contact record
- ☐ Click-to-dial is enabled so calls can be made directly from within the CRM
- ☐ Call recordings are stored and accessible from within the contact timeline
- ☐ Missed calls are flagged and trigger appropriate follow-up
- ☐ Call data feeds into your reporting - volume, duration, missed rate, by person

0 **Score** /6

**There's a significant difference between a phone system that "integrates with" your CRM and one that has a native integration built specifically for it. Native integrations are deeper, more reliable, and don't break when either platform updates.**

# CONNECTIVITY

## The foundation everything else runs on

No integration works properly on a poor connection. VoIP call quality, CRM load times, and video calls all depend on having the right infrastructure - and most connectivity problems in agencies aren't about speed, they're about the wrong type of connection or poor configuration.

- ☐ Business-grade broadband is in place (not a repurposed residential package)
- ☐ Upload speed has been tested - VoIP and video are upload-heavy
- ☐ Quality of Service (QoS) is configured to prioritise voice traffic
- ☐ A backup or failover connection exists in case the primary line drops
- ☐ Desk phones are on wired connections where possible
- ☐ Router firmware is up to date and maintained

0 **Score** /6

**QoS configuration is the single biggest quick win for agencies experiencing call quality issues.**

# REPORTING, SECURITY & CONTINUITY

**Protect what you've built - and know if it's working**

Once your CRM is properly integrated and your workflows are running, you need two things: visibility into what's working, and confidence that the whole setup is secure and won't let you down.

- [ ] Key metrics are tracked: call volume, missed calls, lead response time, conversion by source
- [ ] CRM reports are reviewed regularly by management
- [ ] Two-factor authentication is enabled for all CRM users
- [ ] Staff offboarding process removes CRM access on the same day
- [ ] A business continuity plan exists for CRM or phone system outages
- [ ] Annual review of all integrations, access levels, and data retention policies is scheduled

0 **Score** /7

**A simple shared offboarding checklist between HR and whoever manages your systems closes a lot of issues.**

## Final Score

0 /45

| Under 20 | 20-37 | 38-45 |
|---|---|---|
| Don't worry. Most agencies start here. A focused 90-day plan can move you to 35+ with the right support. | Good foundations, but there are key improvements still available to you. | You're running a tight, well-integrated operation. The focus now is maintenance and marginal gains. |

In our experience, most agencies manage their CRM data well enough. The place they consistently fall down is connectivity and phone system integration – two areas that are invisible when they're working and expensive when they're not.

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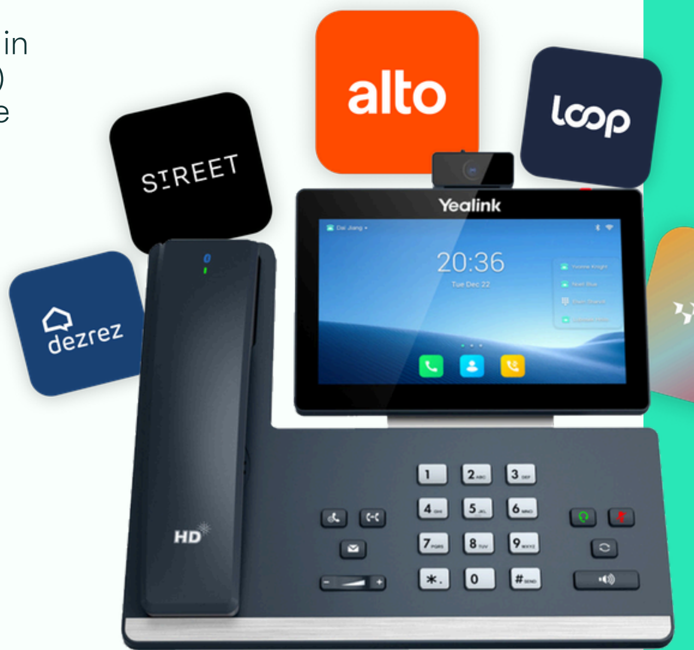
### Real CRM Integration

We do full native integration the leading CRMs in the estate agent market (Alto, Loop, Street etc.) Auto-pop when customers call. Auto-transcribe conversations straight to records. Click-to-dial from anywhere.

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