Operating Library

REAL ESTATE / SALES & ACQUISITIONS

1.1.1 · Buyer Lead Capture & Routing

Capture buyer lead from portal enquiry

01 Overview

A buyer's enquiry through a property portal starts this procedure. It reaches the CRM through the portal's feed, or lands in the shared enquiry inbox by email. A buyer's email to another inbox, passed on to the shared enquiry inbox, is handled the same way. The sales administrator makes sure each enquiry is in the CRM once, on the buyer's existing record where there is one. The lead carries the listing, the buyer's message, the time they sent it and their consent. Spam is marked, and enquiries that are not from buyers go to the right person. The work ends when each genuine buyer lead is marked ready for "Route lead by neighborhood and price band". This procedure does not contact the buyer or choose a sales agent.

02 People

Does the Work	Sales Administrator, or the rostered Sales Agent where there is none
Confirms or approves	The Sales Manager decides where an enquiry goes when the Sales Administrator cannot tell.
Is informed	The IT Lead and the Sales Manager are told when a portal's enquiries stop reaching the CRM.

Frequency	Typical volume	Time per run
continuous	Confirm during review	Confirm during review

03 The Steps

Trigger

A buyer sends an enquiry through a property portal and it reaches the CRM or the shared enquiry inbox. The enquiry is about one of the agency's listings or the agency itself or, where the agency buys portal leads, about a home another agency lists. A buyer's enquiry emailed straight to an office or personal inbox, and passed on by "Route invoices, contracts and applications to the right team", starts it too.

01 **Receive the enquiry from the portal feed**

System Step · The CRM

Where the property portal sends enquiries straight to the CRM, the CRM creates a new lead. The lead holds the portal, the listing, the buyer's message and the time it arrived. the CRM never assigns a new portal lead to a sales agent. Leads are assigned only in "Route lead by neighborhood and price band". Any automatic message on new portal leads stays off until the privacy lead and the sales manager have set and tested it. It must stay within the buyer's consent.

02 **Log an emailed enquiry in the CRM**

Responsible Role · Sales Administrator

Where enquiries arrive in the shared enquiry inbox by email, log each one in the CRM as it arrives. Copy the buyer's name, phone, email and message exactly, and add nothing about them from elsewhere. Record the portal, the listing and the time on the portal's email, not the time you logged it. For an enquiry passed on from another inbox, record that inbox as the source and the time the buyer sent it.

03 **Check the enquiry is from a genuine buyer**

Responsible Role · Sales Administrator

Read the message and the details the buyer gave. Mark spam and fake enquiries in the CRM with the reason, rather than deleting them. Handle an enquiry from a seller, a tenant, a buyer's agent or a scammer as its exception below says.

04 **Check whether the buyer is already in the CRM**

Responsible Role · Sales Administrator

Search the CRM by the buyer's phone number and email, not by name alone, since two buyers can share a name. If the buyer already has a record, make sure the enquiry sits on it. Note any sales agent already working with them.

05

Flag a duplicate record

Responsible Role · Sales Administrator

If a second record now exists for the same buyer, flag the pair for "De-duplicate buyer and seller records", where a person approves any merge. Never merge or delete a record here.

06

Check the phone number and email

Responsible Role · Sales Administrator

Check the phone number has the right number of digits for its country and the email address is well formed. If one is wrong or missing, flag it on the lead so the sales agent uses the other. Never discard a lead because one contact detail is bad.

07

Record the listing and what the buyer asked

Responsible Role · Sales Administrator

Link the lead to the listing in the CRM and record its neighbourhood. For a home another agency lists, record the address, neighbourhood and listing-service number instead. For a general enquiry, record the areas and budget the buyer gave. Note what the buyer asked, such as the price, inspection times or the contract.

08

Record the price band for routing

Responsible Role · Sales Administrator

Take the price band from the advertised price or approved price guide, using the bands in the routing rules in the shared documents. Where the agency's listing has neither yet, such as an auction campaign before its guide is approved, record the band the listing agent gives for routing. Never quote that band to the buyer.

09

Record the buyer's contact consent

Responsible Role · Sales Administrator

Record in the CRM the consent the enquiry carries, such as a ticked box for listing alerts, and that it came through the portal. Record any channel the buyer asked not to be contacted on. Add the buyer to no newsletter or alert list their consent does not cover.

The Steps - continued

10 **Mark the lead ready to route**

Responsible Role · Sales Administrator

Set the lead's status in the CRM to ready to route and tag its source with the portal's name, or the inbox it was passed on from. This hands the lead to "Route lead by neighborhood and price band".

Outcome

Every portal enquiry is in the CRM once, on the buyer's existing record where there is one. It carries the portal, the time sent, the listing or stated areas and the consent. Each genuine buyer lead is marked ready to route. Every other enquiry is marked with its reason: spam, passed to its owner, opted out, unreachable or reported as a security incident.

04 What finished work looks like

WORKED EXAMPLE

A portal enquiry about a three-bedroom townhouse lands in the shared inbox after hours, asking for the price guide. The sales administrator logs it with the portal's send time and finds the buyer already in the CRM from an open home. They add the enquiry to that record and flag the phone number, which is a digit short, for an email reply. The lead is marked ready to route with the listing's neighbourhood and price band.

05 Why the work matters

For the business

- Every portal enquiry comes from advertising the agency or its sellers paid for. Capturing each one once, against the right listing and contact, means no buyer is lost or chased twice. It also shows which portals bring buyers.

For the customer

- The buyer's question reaches one sales agent with the property attached. They are answered sooner, and are not asked to repeat themselves or called by two sales agents.

For the employee

- Sales agents receive leads with the listing, message and contact details already checked. The record shows when each lead arrived and who had the buyer first, which settles most lead disputes.

06 Rules to Follow

- Capture each enquiry as soon as it arrives, oldest first. The agency's response time runs from when the buyer sent the enquiry, not from when it was logged.
- Out of hours, the person the sales manager's after-hours roster names captures enquiries, so the response time the agency sets for those hours can be met.
- Treat an enquiry as genuine unless it is plainly spam or fake. A doubtful lead costs one call, but a real buyer marked as spam is lost to another agency.
- Where a portal emails enquiries to the listing agent rather than the shared inbox, the listing agent forwards each one to the shared inbox at once. Where the routing rules give listing enquiries to the listing agent, they also reply at once under "Reply to every enquiry within the response SLA". The sales administrator still captures the enquiry with the buyer's send time, and routing records it as the listing agent's.
- Collection-notice wording for portal enquiries comes only from "Maintain privacy policy on website". When new approved wording arrives, the privacy lead and the sales manager copy it word for word into any automatic message on new portal leads. The sales manager sends it to the sales agents at once, for their written replies to portal enquiries.

07 When Something Goes Wrong

The enquiry is from a seller or asks for an appraisal

Mark it as a seller enquiry in the CRM and pass it to the sales manager. The sales manager allocates it to a sales agent, who books the visit through "Visit property for appraisal".

The enquiry is about a rental property

Pass it to the leasing consultant who holds the rental listing, and mark it in the CRM as passed to leasing.

A buyer's agent enquires for their client

Record the buyer's agent as the contact and mark the buyer as represented, so every dealing goes through the buyer's agent. Mark the lead ready to route as usual.

The enquiry looks like a scam or phishing attempt

Do not open its links or attachments, and do not reply. Report it at once through "Respond to a security incident", and mark it in the CRM.

Neither the phone number nor the email works

Mark the lead unreachable in the CRM with the reason, and do not route it. If the buyer makes contact again, add the new enquiry to this record.

An enquiry shows on the portal but never reached the CRM or the inbox

Capture it now with the time the buyer sent it, and tell the sales manager so a sales agent replies at once. Tell the IT lead that the feed missed an enquiry.

The buyer asks not to be contacted, or to have their details deleted

Record the opt-out in the CRM before anything is sent, and do not route the lead. Pass a deletion request to "Process requests to see, correct or delete data".

> **Who to ask for help**
>
> Tell the sales manager when enquiries arrive faster than they can be captured, or when you cannot tell where one belongs. Keep capturing oldest first meanwhile. When a portal feed or the inbox stops delivering, tell the IT lead and the sales manager, and check the portal's own enquiry list until it is fixed.

08 Inputs & outputs

What you need

- A buyer enquiry from a property portal
- A buyer enquiry passed on from an office or personal inbox

What you produce

- A checked buyer lead in the CRM, ready to route