

# Do these 7 Things to Maximize ROI from Your Real Estate Database

You've built a database—but are you getting the most out of it? Whether you're sitting on thousands of leads or just starting to organize your sphere, the real value of your database comes when it's activated, nurtured, and strategically worked.

This 7-step checklist is designed to help you increase engagement, drive conversions, and turn your database into a reliable revenue generator. It's short, actionable, and made even easier when paired with BoldTrail's powerful tools.

Use it quarterly—or whenever you need a revenue reset.



# 1 Make sure every lead is set up on automated eAlerts

Don't let good leads slip through the cracks. Sending personalized property alerts keeps your brand top-of-mind and prompts repeat visits to your site. If you're leveraging a **modern CRM**, you should be able to quickly filter for leads who aren't on eAlerts and set them up with a few clicks. Set alerts based on search behavior or preferred neighborhoods.

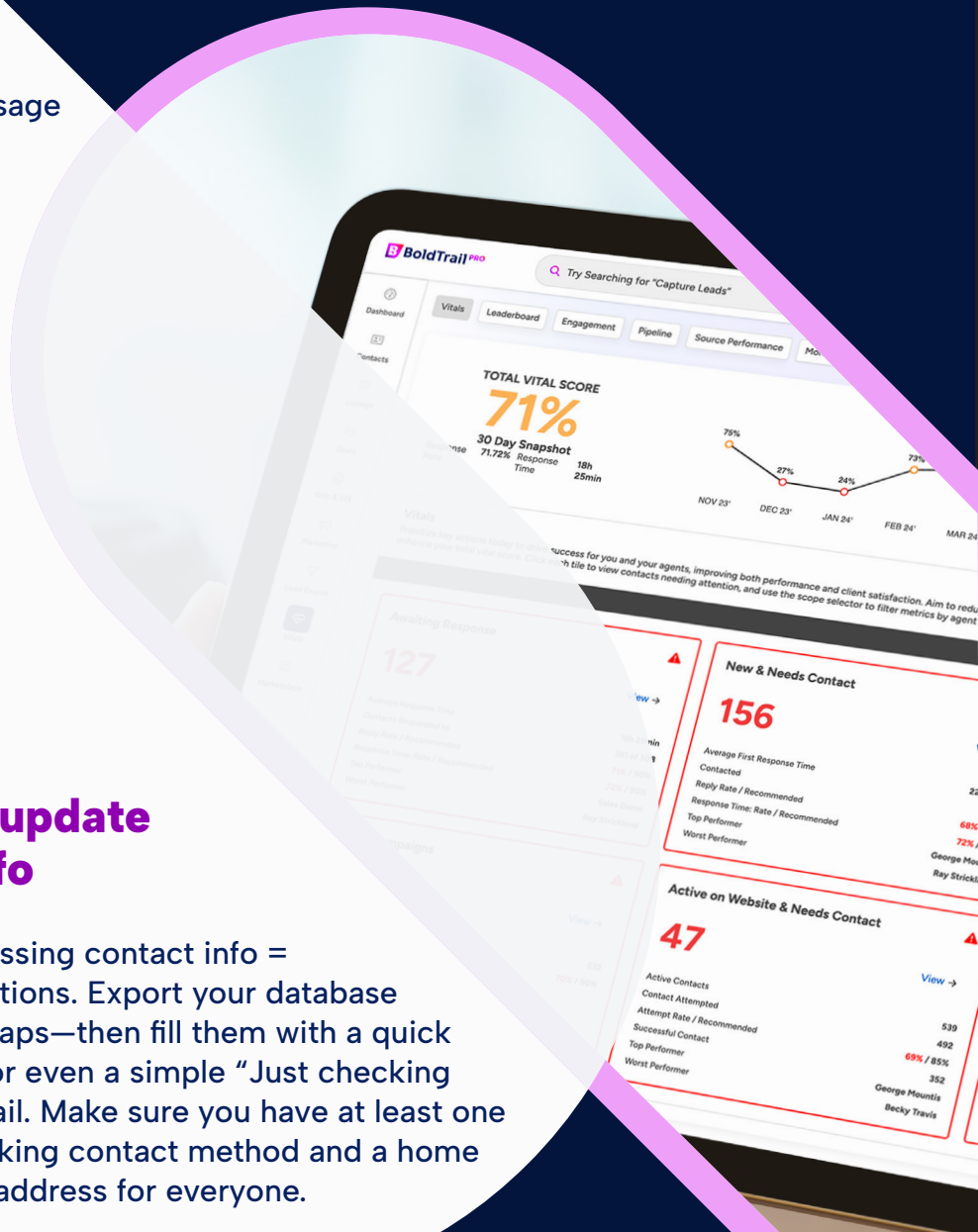
## 2 Tag and segment your leads

You wouldn't send the same message to a first-time buyer and a luxury investor—so don't. Start by reviewing your database and tagging leads based on categories like buyer/seller type, timeline, price range, or even source. Then, tailor your Smart Campaigns to each segment.

**BoldTrail makes it easy!** Apply bulk actions from your lead list view to clean up or re-tag quickly. Use the **"Vitals" dashboard** to quickly spot leads missing key automations like eAlerts.

## 3 Audit and update contact info

Outdated or missing contact info = missed connections. Export your database and identify gaps—then fill them with a quick call, text, or even a simple "Just checking in" email. Make sure you have at least one working contact method and a home address for everyone.



## 4 Re-engage Cold Leads: use engagement signals to prioritize follow-ups

This is where smart tech really shines. When you're managing hundreds or even thousands of leads, it's impossible to manually track who's active and who's not. BoldTrail does the heavy lifting with predictive AI that surfaces the leads most likely to transact—based on behavior, engagement patterns, and more. That means you can spend your time following up with the people who matter most, right now.




Your dashboard in BoldTrail identifies high priority leads and prompts you to reach out. Want to take it a step further? Activate Success Assurance to get a dedicated lead concierge team calling, texting, and qualifying your leads on your behalf—so you can focus on closing.

## 5 Track your top engagement metrics

Want to know if your database is really working? Start by tracking the activity that drives results. Every week, measure the number of:

- **New leads added**
- **Calls made**
- **Conversations held**
- **Appointments set**
- **Showings conducted**
- **Contracts signed**
- **Profitability Metrics: GCI, Transaction Volume, Units Sold**
- **Customer Sentiment**

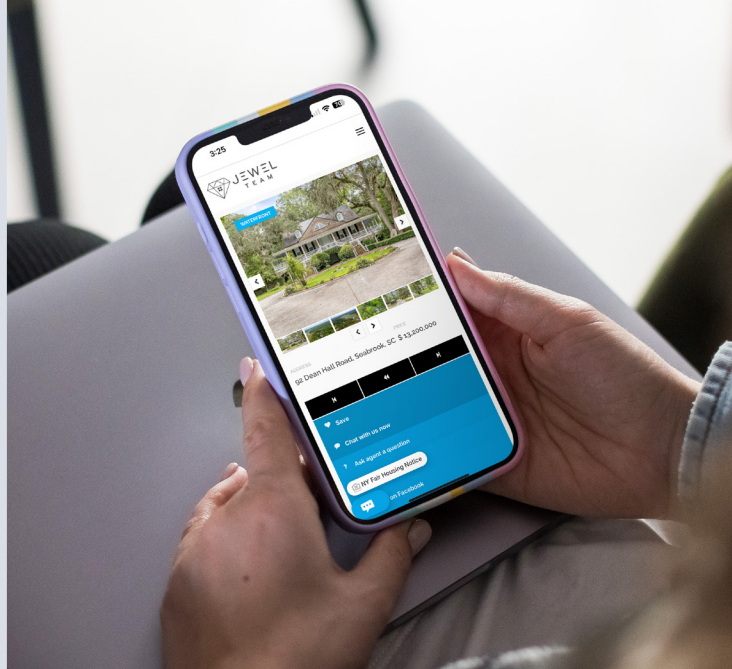
Most agents average 10–15 conversations to book one appointment, and 3–5 appointments to close a deal. If you're falling short on transactions, it's probably a pipeline problem—not a market one. When you know your numbers, you can find the gaps and fix them fast.



(Take the guesswork out of it!) Use your **"Vitals" dashboard** to track engagement activity like logins, opens, and clicks. Combine that with lead stage tracking and task completion for a full picture of what's driving your business.

## 6 Don't forget your sphere

Your past clients and personal network are your best source of repeat and referral business—but only if you stay connected. Segment your sphere and provide ongoing value with tools like **CoreHome**, which offers real-time home value insights, equity reports, and trusted vendor suggestions.



## 7 Schedule database time every week

Working your database should be a habit, not a scramble. Block out 30–60 minutes every week to check engagement, tag new leads, review campaigns, and follow up with top prospects. This routine effort pays major dividends over time.

## Ready to take action?

Want to see how BoldTrail makes this checklist easier to execute—and more profitable?

[GET A DEMO](#)

 **BoldTrail**

Fortune favors the bold (and organized).