

Getting started

Checklist for Real Estate

To help you get started fast with Constant Contact, we've created a step-by-step plan for our Real Estate customers, with the top tools and educational resources you'll need to reach your goals.

Which goal do you want to get started with today?

- [Get more leads and grow your list of contacts.](#)
- [Nurture and qualify leads.](#)
- [Get referrals and repeat business from current and past clients and professional connections.](#)
- [See more ways to have a growing and connected client base, even on the go.](#)

Get more leads and grow your list of contacts:



[Connect or create your Google My Business Profile](#)

Get found by people who are actively searching for Real Estate agents in your area with a Google My Business profile. Connect or create your profile and track results right in your Constant Contact account. You'll be able to monitor how often you're appearing in search results, how often you're being viewed, and more.

- [How to set up Google My Business](#)
- [How to manage your Google My Business account](#)
- [Tips for managing your listings and responding to reviews for real estate](#)



[Create a Lead Ad for Facebook & Instagram](#)

Get more leads with our streamlined version of Facebook & Instagram Ads. Quickly design a professional ad that gets attention with offers like a free home valuation, educational guide (i.e. checklist for selling a home, top fun things to do in the area),

or educational event (i.e. first-time homebuyers webinar), and target based on location and interests like Zillow, Trulia, property finder, luxury homes, weddings, and more. Visitors to your ad will fill out a form and their contact information will be automatically stored in your account.

- [How to use our Facebook Lead Ads](#)
- [A guide to Real Estate Facebook Ads](#)



[Download our List Builder App on an Android Tablet or iPad](#)

No need for a paper sign-in sheet at your open house or other events to capture visitors' sloppy signatures. Allow people to sign in on a tablet; the information will automatically sync to your account, in a specific contact list if you'd like. Then you're ready to follow up.

- [How to use the ListBuilder App](#)



[Create a Lead Generation Landing Page](#)

Give prospects a way to learn about you and capture their information without having a full website. Include a short intro with what sets you apart, a testimonial, contact info, and a sign-up form with a reason to sign up—like a free home valuation or free selling/buying strategy call. Include the customizable URL to your landing page in the signature of your emails, social posts, and anywhere you interact with prospects.

- [How to create a lead generation landing page for capturing new sign-ups](#)



[Track your contact growth](#)

Take a look at your contact growth over time and see where your new contacts are coming from.

- [Contract growth report overview](#)

Nurture and qualify leads:



[Automate a Welcome Email](#)

Create a welcome email that is automatically sent when a contact is added to a specific email list so you can engage those new contacts right away. Include an intro video and showcase your experience, what sets you apart, your local market expertise, what buyers and sellers can expect in today's market, testimonials, a link

to your listings (if applicable), and contact information.

- [How to customize your welcome email](#)



Automate syncing with your lead source tools

If you have lead sources other than Constant Contact, like Zillow, save time by connecting your account with those tools so your leads are automatically added to your account and will automatically receive your welcome email.



Use reporting to create your call list

Use reporting to know which leads are engaged and what they are interested in so you know who to prioritize reaching out to and can turn them into clients.

- [How to use your email click report](#)
- [How to see your poll results](#)



Replace your automated Welcome Email with an Email Series

When you have more time, further nurture your leads and easily know your hot ones by automating a few welcome emails instead of just one. Add links to helpful resources—like staging tips, a first-time homebuyers guide, or tips to improve credit ratings—so you can use click reporting to learn about your leads. Include online polls to know if they have an agent, if they are a buyer or seller, their readiness, and more.

- [How to create an automated email series](#)
- [Best practices for an effective automated welcome series](#)

Get referrals and repeat business from current and past clients and professional connections:



Add contacts

Add contacts into your account by uploading a list or by connecting your account with the tools you're already using like Zillow, Top Producer, Boomtown, CINC, LionDesk, Facebook, and more.

- [How to add contacts to my account](#)



Pick and customize your email template(s)

Get started fast, creating emails—like your newsletters, latest property listings, or open house invitations—by selecting from our Real Estate templates designed

to drive engagement.

- [How to create a master template](#)
- [Email design tips](#)
- [Email content ideas](#)



Send an Email Newsletter

Email newsletters offer a unique platform to stay top-of-mind and strengthen your connection with current and former clients. Get continued engagement by including local market conditions, interest rate changes, or home design or maintenance tips in addition to listings. You can keep it simple by summarizing and linking to content from sources like National Association of Realtors, Houzz, or HomeAdvisor. The recommended mailing schedule is once a month; in addition to other mailings devoted to new property listings, open houses, etc.

- [How to copy your email template to use for a new email](#)
- [How to schedule and send your email](#)
- [Real estate newsletter template option](#) (if you didn't already create one)
- [Effective newsletter content & design](#)



Connect or create a social presence

A business page on Facebook and Instagram is a way to engage your clients and also gain visibility among their connections. We make social simple. When you create a post in Constant Contact, it will be automatically optimized for each of your social channels and can be posted or scheduled to all at once. You'll have all of the images, copy and reporting from your email and social posts right at your fingertips—no need to bounce between platforms to do your email and social marketing or know what's working best.

- [How to set up and/or connect your Facebook business page](#)
- [How to set up and/or connect your Instagram business profile](#)
- [Social media marketing for real estate: so much opportunity, what's worth my time?](#)



Create a social post

Engage your connections—and theirs—by sharing local market conditions and interest rate changes, listings, upcoming open houses, home design and maintenance tips, and your local favorite hot spots. Save time by linking to existing content from sources like NAR, Houzz, and HomeAdvisor. Daily posting is ideal to

maximize your visibility but not always possible, so do what works for you.

- [How to create and schedule a social post](#)
- [2021 marketing calendar for real estate](#)

[View your email and social reporting](#)

Use reporting to know who is engaging with your communications and what content they're engaging with most so you can do more of it.

- [How to know if your email is successful](#)
- [Email benchmarks by industry](#)
- [How to view the results of your social posts](#)

[Send a review request email](#)

Get the full power of your relationship-building efforts by sending an email to request reviews from current and past clients on Google, Facebook, or Zillow to boost credibility with potential leads.

- [Review request template option](#)
- [How to ask for a review or testimonial](#)

[Setup automated anniversary and/or birthday emails](#)

If you're keeping track of your contacts' birthdays and/or purchase dates, you can easily strengthen your relationships by automating purchase anniversary and birthday email greetings.

- [How to create a birthday or anniversary email](#)

[Create a client appreciation event](#)

Strengthen your relationships and generate referrals by hosting a client appreciation event. You can easily stay organized and save time with our Event Management tool, which makes promotion and RSVP tracking simple.

- [How to create an event](#)

See more ways to have a growing and connected client base, even on the go.

[Plan ahead and build out future campaigns with the Marketing Calendar](#)

Plan ahead and stay connected with our Marketing Calendar feature. Not sure where to start? Check out our full year's-worth of content ideas designed specifically for Real Estate customers.

- [How to use the marketing calendar to plan your marketing](#)
- [Real estate seasonality and your marketing strategy](#)
- [2021 marketing calendar for real estate](#)

Try our mobile app on [Android](#) or [iOS](#)

View how many people are engaging with your email and social posts, access and update your list of contacts on the go, or pull photos directly from your mobile device into your account to use in your email marketing and social posts. You can also use the app to create and launch emails and social posts.

- [How to add and manage contacts with the our mobile app](#)
- [How to import and delete library images in the our mobile app](#)

Step up your automated Welcome Series to further engage leads

You can have your leads automatically receive different emails based on their interests with automatic click segmentation. For example, if a lead clicks on a buyer's guide, you can have them receive buyer-specific emails. If a lead clicks on a seller's guide, you can have them start to receive seller-specific emails. With more relevant content, you can turn leads into clients faster. Best of all, you only have to set up these behavior-based emails once.

- [How to use automatic email click segmentation](#)
- [10 smart tips for real estate drip campaigns](#)

Check out our [Making Sense of Marketing Guide for Real Estate](#)

Get an overall view of how to leverage online marketing to reach your goals.