



FREE GUIDE · SUMMARY

Real estate lead routing and response workflow

An architecture pattern, not a client case study. Every lead gets an owner.





SOURCES AND DEDUPE

Seven doors, one contact per person.

01

One intake path

Portals, IDX, forms, ad leads, calls, texts and open houses all arrive the same way.

02

Match, then merge

Phone first, then email; shared household details go to a person.

03

Keep the history

Every inquiry kept; the first source never overwritten.



ROUTING

Rules in a fixed order.

01

Relationship and listing

An existing agent first, then the listing agent.

02

Territory and price band

Areas and ranges your team agreed on, then a stated language.

03

Round-robin, then fallback

Skip agents who are away; the team lead gets what's left.



TIMERS

Accept it, or it moves on.

01

Instant reply

Inquiry received, and when a person will call.

02

Agent offer

A button to accept, with a timer you set.

03

Reassign

Next agent, team lead told; a shared pool after a second miss.



NURTURE AND HANDOFF

For people who said “next year”.

01

Timeline tags

Set at the first conversation; one track at a time, with a cap.

02

Stop rules

Every message stops on a reply, a booking or an opt-out.

03

IDX to CRM

The MLS and IDX own listings, the CRM owns the person; we design the handoff.



CONSENT · NOT LEGAL ADVICE

Record what each person **agreed to**.

TCPA and A2P 10DLC in the US, PECR and TPS in the UK, the Spam Act and Do Not Call Register in Australia: considerations to review with your broker or adviser.

[Read the full guide →](#)

teqprotech.com/resources/realtor-lead-routing-workflow

