



STRIVE

FREELANCING AGENCY

Precision Planning, Measurable Growth



CASE STUDY

Lead Generation for Real Estate

Illustrative Sample Case Study

This case study illustrates how STRIVE supported a real estate business by building a structured lead generation system, organizing lead data, improving follow-ups, and creating a more reliable sales pipeline.



INDUSTRY:
Real Estate



SERVICE:
Lead Generation



TIMELINE:
4 Weeks



TOOLS:
Google Sheets,
CRM, Web Research

Lead Dashboard

Total Leads: **248** | New Leads: **68** | Contacted: **112** | Qualified: **44** | Conversion Rate: **17.7%**

Leads by Source



Lead Status Overview



Recent Leads

Name	Source	Property Interest	Status	Follow-Up Date
Michael Johnson	Website	Downtown Apartment	Contacted	May 20, 2024
Sarah Williams	Referral	Luxury Villa	Qualified	May 21, 2024
David Brown	Social Media	Commercial Space	New	May 22, 2024
Emily Davis	Website	Beachfront Condo	Proposal	May 23, 2024

CRM Follow-Up Board

New (8)	Contacted (12)	Qualified (7)	Proposal (4)	Closed Won (3)
James T. Apartment May 20	Daniel K. Condo May 21	Robert S. Commercial May 22	William P. Apartment May 23	Christopher A. Villa May 24
Olivia M. Villa May 20	Sophia L. Townhouse May 21	Isabella R. Villa May 22	Mia H. Condo May 23	Amanda G. Townhouse May 24
+ Add Lead	+ Add Lead	+ Add Lead	+ Add Lead	+ Add Lead

FOLLOW-UP CALENDAR

SUN	MON	TUE	WED	THU	FRI	SAT
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30			



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CASE STUDY

Client Overview

Business context at a glance

STRIVE's client is an independent real estate business specializing in property sales and inquiries. With a steady inflow of leads from multiple channels, the business needed reliable support to capture, qualify, and nurture leads—turning interest into successful real estate outcomes.



BUSINESS TYPE:

Residential & investment property services



TARGET MARKET:

Home buyers, sellers, investors



LEAD CHANNELS:

Website, referrals, social media, listings portals



MAIN SUPPORT AREA:

Prospect research, lead sourcing, qualification, follow-up tracking



COMMUNICATION VOLUME:

High daily inquiry and follow-up activity



REPORTING NEED:

Clear weekly lead status and pipeline updates



KEY INSIGHT

The client needed dependable lead generation support to bring structure, consistency, and visibility to lead acquisition—helping them focus on closing more real estate opportunities.



CASE STUDY

Client Challenge

What needed to improve

Before partnering with STRIVE, the client faced daily operational inefficiencies that slowed progress and created unnecessary stress.

Key challenges included:



INFORMATION WAS SCATTERED

Important files, notes, and updates were stored across multiple tools and folders, making it hard to find what mattered.



FOLLOW-UPS WERE INCONSISTENT

Tasks and follow-ups were often missed or delayed due to lack of consistent reminders and tracking.

Missed Follow-ups	
Proposal follow-up	Overdue
Client check-in	Overdue
Invoice reminder	2 days late
Project updates	Missed



INBOX RESPONSES WERE DELAYED

High email volume and unorganized inboxes led to slower response times and missed opportunities.

Inbox (274)		
Client A	Re: Proposal Update	2:45 PM
Vendor	Invoice Attached	11:30 AM
Client B	Meeting Request	Yesterday
Team Member	Project Update	Yesterday
Newsletter	Weekly Digest	Monday



CALENDAR COORDINATION LACKED STRUCTURE

Scheduling meetings and managing time zones often caused conflicts and last-minute rescheduling.

This Week				
MON	TUE	WED	THU	FRI
	Client Call 10:00 AM		Rescheduled Call (Conflicting)	
Team Meeting 1:00 PM				Review Session 3:00 PM



REPORTING WAS MANUAL

Reports and summaries had to be created manually, consuming valuable time and increasing risk of human error.

Weekly Report (Manual)			
Task	Status	Owner	Notes
Client Calls	Done	—	—
Proposals	In Progress	—	—
Invoices	Done	—	—
Follow-ups	Pending	—	—
Research	In Progress	—	—



PROGRESS TRACKING WAS DIFFICULT

Without a centralized system, tracking project progress and deadlines was inconsistent and hard to monitor.

Projects Overview		
Project A		40%
Project B		60%
Project C		25%
Project D		10%
Project E		70%



These challenges created wasted time, inconsistent communication, and delayed deliverables. The business needed a clearer, more organized, and proactive approach to manage daily executive support functions.



CASE STUDY

Goals & Priorities

What needed to improve

The goal was not only to complete tasks, but to build a dependable operating rhythm for the client—one that brings clarity, consistency, and more time to focus on high-impact work and growth.



CREATE A STRUCTURED WORKFLOW

Establish clear systems and processes to ensure tasks move smoothly from start to finish.



IMPROVE CALENDAR VISIBILITY

Optimize scheduling and prioritization to reduce conflicts and protect focus time.



ORGANIZE INBOX & FOLLOW-UPS

Streamline email management and ensure important messages and follow-ups never fall through.



MAKE REPORTING EASIER TO REVIEW

Create clear, organized reports and summaries that provide quick insights.



CENTRALIZE INFORMATION

Build a single source of truth for documents, resources, and project updates.



SUPPORT SMOOTHER DAILY OPERATIONS

Anticipate needs, reduce bottlenecks, and keep daily operations running seamlessly.

PRIORITY MATRIX



PRIORITY FOCUS

	HIGH	MEDIUM	LOW
Create a structured workflow	●	○	○
Improve calendar visibility	●	○	○
Organize inbox & follow-ups	●	○	○
Make reporting easier to review	●	○	○
Centralize information	●	○	○
Support smoother daily operations	●	○	○



CASE STUDY

STRIVE Solution

How the workflow was improved

STRIVE designed a practical support system focused on structure, clarity, and execution. We built a streamlined workflow that brings order to daily tasks, communication, information, and reporting — so the executive can lead with confidence.

OUR SUPPORT FRAMEWORK

- 1. STRUCTURED TASK PLANNING**
 Daily priorities, time-blocking, and action plans to keep work focused and on track.
- 2. CALENDAR ORGANIZATION**
 Smart scheduling, meeting coordination, and reminders to protect focus time and ensure nothing is missed.
- 3. INBOX & FOLLOW-UP SUPPORT**
 Inbox management, response drafting, and follow-ups to keep communication clear and timely.
- 4. INFORMATION ORGANIZATION**
 Documents, files, and notes are organized for quick access and better decision-making.
- 5. TRACKER CREATION**
 Custom trackers for projects, tasks, clients, and goals to monitor progress and results.
- 6. RECURRING REPORTING & HANDOVER PREPARATION**
 Regular reports, updates, and polished handover materials ready for decisions and presentations.

STRIVE Executive Dashboard

Today's Overview

Tasks	12
Meetings	3
Emails	28
Top Priority	Client Proposal

Upcoming Meetings

10:00 AM	Strategy Call
11:30 AM	Team Sync
02:00 PM	Client Update

Top Priorities

- ✓ Client Proposal
- ✓ Q2 Reporting
- ✓ Project Review

This Week

78%

Progress

Project Tracker

Project	Status	Owner	Due Date	Progress
Client Proposal	In Progress	STRIVE	May 25	75%
Q2 Reporting	In Progress	STRIVE	May 28	60%
Market Research	Completed	STRIVE	May 18	100%

Quick Notes

- Prepare proposal deck
- Follow up with client
- Update Q2 metrics

Inbox & Follow-Ups

- Client Inquiry: Replied
- Meeting Follow-up: Sent
- Proposal Request: Replied
- Update Needed: Pending
- Report Submission: Sent

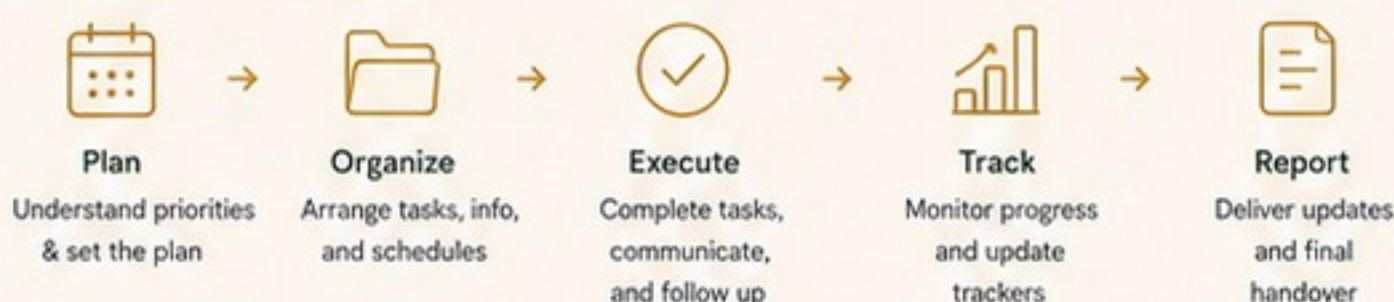
Task Checklist

- ✓ Prepare Proposal
- ✓ Research Market Data
- ✓ Schedule Client Call
- Update Presentation
- Send Weekly Report

Calendar View

May 2025						
SUN	MON	TUE	WED	THU	FRI	SAT
				1	2	3
4	5	6 Strategy Call	7	8	9 Team Sync	10
12	13	14 Client Update	15	16	17	18
19	20	21 Report Review	22	23	24	25
26	27	28	29	30	31	

How We Work – Simple, Consistent, Reliable



This system allows the executive to stay focused on high-level decisions while we handle the details with precision. Every process is designed to save time, reduce stress, and drive results.



A reliable partner.
A structured system.
Stronger outcomes.



Illustrative sample for portfolio presentation.
Client details have been changed for privacy.





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CASE STUDY

Work Process

From requirement to final delivery

At STRIVE, we follow a structured and transparent process to ensure every lead we deliver is accurate, relevant, and ready to drive results. Our proven workflow helps maintain consistency, quality, and clear communication at every stage.



STRIVE ensures a seamless lead generation process — from understanding your requirements to delivering ready-to-use leads. Our focus is on accuracy, relevance, and timely updates that support your real estate business growth.



STAY INFORMED

Clear communication keeps you updated at every stage.



IMPROVE CONSISTENCY

A defined workflow ensures reliable quality and consistent results every time.



ENSURE USABLE OUTPUTS

Clean, accurate, and actionable leads that save time and drive results.





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CASE STUDY

Deliverables

Project outputs

All outputs were delivered in a clear, organized, and client-ready format—ensuring easy review, actionable insights, and seamless integration into the client's real estate business.

1 LEAD DASHBOARD OR TRACKER



Lead Dashboard

Total Leads	New Leads	Contacted	Qualified	Conversion Rate
248	68	112	44	17.7%

Leads by Source



Lead Status Overview



2 ORGANIZED SOURCE DATA

Source Data - Raw Leads

Date	Source	Name	Phone	Email	Property Interest	Location
May 19	Website	Michael Johnson	555-123-4567	michael.j@email.com	Downtown Apt	Miami, FL
May 19	Facebook Ad	Sarah Williams	555-987-6543	sarah.w@email.com	Townhouse	Orlando, FL
May 20	Referral	David Brown	555-246-8101	david.b@email.com	Single Family	Tampa, FL
May 20	Instagram	Emily Davis	555-135-7924	emily.d@email.com	Beachfront Condo	Miami, FL
May 21	Website	James T.	555-314-1592	james.t@email.com	Investment Property	Fort Lauderdale, FL
...						

3 QUALIFIED LEAD LIST / SUMMARY REPORT

Qualified Leads Summary

Lead Name	Property Interest	Buyer/Seller	Contact Status	Next Follow-Up
Michael Johnson	Downtown Apartment	Buyer	Contacted	May 25, 2024
Sarah Williams	Townhouse	Buyer	Qualified	May 26, 2024
David Brown	Single Family Home	Seller	Qualified	May 27, 2024
Emily Davis	Beachfront Condo	Buyer	Proposal Sent	May 28, 2024
James T.	Investment Property	Investor	Qualified	May 29, 2024
...				

Summary

Total Leads	248
Qualified Leads	44
Proposal Sent	16
Closed Won	8
Conversion Rate	17.7%

4 PROCESS DOCUMENTATION

Lead Generation Process

- 1 Data collection from multiple sources
- 2 Data cleaning & validation
- 3 Lead qualification & tagging
- 4 Enrichment & property matching
- 5 Follow-up workflow & tracking

Workflow Overview



5 QUALITY-REVIEWED FINAL FILES

- ✓ Clean & accurate data
- ✓ Consistent formatting
- ✓ Duplicates removed
- ✓ Verified contact details
- ✓ Ready for import & use

File Deliverables

- Lead_Dashboard.xlsx
- Qualified_Leads_Report.xlsx
- Source_Data_Raw.csv
- Process_Documentation.pdf

QUALITY CHECK: APPROVED



6 HANDOVER NOTES

Key Notes

- All leads are organized and ready for follow-up.
- Next follow-up dates are suggested for timely engagement.
- Files are structured for easy import into CRM.
- Let us know if you need custom fields or updates.

Handover Checklist

- ✓ Deliverables Complete
- ✓ Files Tested & Verified
- ✓ Data Accuracy Confirmed
- ✓ Instructions Provided
- ✓ Client Handover Done

Delivered by: STRIVE Team

Date: May 23, 2024



Handed Over with Care. Ready for Results.

Every file, every detail, and every insight—structured, verified, and ready to drive your real estate business forward.





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CASE STUDY

Before & After

How the process changed

Before STRIVE, lead operations were reactive and scattered, leading to missed opportunities and inconsistent results. After implementation, the system became organized, transparent, and proactive—driving better follow-ups and stronger conversions.

BEFORE



Scattered lead information

Leads stored in multiple places with missing or duplicate data.



Inconsistent follow-ups

Follow-ups were random, delayed, or often skipped.



Manual tracking

Updates done manually, prone to errors and delays.



Unclear lead priorities

No clear way to identify or prioritize hot leads.



Slow review process

Time-consuming reviews with manual data gathering.

AFTER



Organized lead database

All leads stored in one clean, structured database.



Clear follow-up structure

Scheduled follow-ups with defined steps and timing.



Centralized tracker system

Real-time updates in one place for accuracy and accountability.



Better pipeline visibility

Leads organized by stage for better focus and action.



Faster daily review

Quick access to key insights for faster decisions.

The transformation from a scattered, reactive approach to a structured, proactive system gave the real estate business the clarity, efficiency, and consistency needed to generate more quality leads and convert them with confidence.



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CASE STUDY

Business Outcomes

Results demonstrated by this illustrative project

The structured lead generation system implemented for this real estate business delivered meaningful improvements across visibility, organization, and follow-up consistency—helping the client build a stronger foundation for sustainable growth.



BETTER LEAD ORGANIZATION

Leads are captured, categorized, and tracked consistently, reducing manual errors and missed opportunities.



CLEANER WORKFLOW

Standardized processes and automation reduce repetitive tasks and create a smoother day-to-day operation.



STRONGER FOLLOW-UP VISIBILITY

Clear timelines, status updates, and reminders help ensure no lead is overlooked and follow-ups stay consistent.



EASIER REVIEW

Organized data and reports make it easy to review performance and identify areas for improvement.



MORE CONSISTENT PIPELINE MANAGEMENT

A steady flow of qualified leads and structured tracking support ongoing growth and better conversion opportunities.



PROFESSIONAL REPORTING

Clear dashboards and reports provide valuable insights to support better decisions and client communication.



SUMMARY

This support model helped the client stay focused on property sales while lead generation operations remained organized, efficient, and dependable—contributing to a stronger business foundation and long-term growth.





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Need a Similar Solution?

Let's Build a Real Estate Lead System That Works for You

Every real estate business has unique lead goals. STRIVE designs a tailored support system that organizes your leads, improves follow-ups, and helps you focus on what you do best — closing deals.

CLIENT FEEDBACK



Verified client feedback will be added after publication approval.
No placeholder testimonial is used.



READY TO TRANSFORM YOUR LEAD WORKFLOW?



Share your current problem



We assess and recommend the best support plan



Focus on closing deals while we handle lead organization

START YOUR PROJECT



REQUEST CUSTOM QUOTE



Let's Connect



hello@striveagency.com



www.striveagency.com



Let's Schedule a Call



At STRIVE, your success is our mission.

Your Goals. Our Support. Great Results.



Thank you for exploring this case study series.
We look forward to supporting your growth journey.



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