

AI READINESS CHECKLIST

FOR REAL ESTATE AGENCIES





INTRODUCTION

How ready is your brokerage to leverage AI for listings, lead generation, and client growth?

Artificial Intelligence is already transforming real-estate marketing, CRM systems, and client experience.

Top-performing agencies are using AI to:

- Automate lead follow-ups and client nurturing
- Generate optimized listing descriptions
- Predict buyer and seller intent
- Personalize marketing at scale

This checklist helps you measure where your brokerage stands and how to prepare for the next phase of AI-driven growth.

“AI won’t replace real-estate agents – but agents who use AI will replace those who don’t.”

AI READINESS CHECKLIST

How to Use This Checklist

1. Rate each item 1–5 (1 = Not true, 5 = Absolutely true)
2. Add up each section's total
3. See your overall AI Readiness Level on the final page

Data & Systems

1. Our CRM captures all leads and interactions automatically.
2. We maintain accurate, de-duplicated client and property data.
3. Our listings data syncs seamlessly across MLS, website, and ad platforms.
4. We track key metrics (lead source, conversion, close rate).
5. Our team can easily access data for marketing or analysis.

Marketing & Lead Generation

6. We use AI tools for ad targeting or audience segmentation.
7. We create AI-assisted listing descriptions or ad copy.
8. We analyze engagement data to refine campaigns.
9. We use chatbots or automated responders for inquiries.
10. Our content strategy includes consistent blogs, emails, or videos.

Sales & Client Experience

11. We have automated lead-follow-up sequences.
12. Our agents use AI-powered CRM recommendations or scoring.
13. We provide clients with personalized property recommendations.
14. We measure client satisfaction post-closing.
15. Our communication tools integrate email, SMS, and chat in one system.

AI READINESS CHECKLIST CONTINUED

Team & Culture Readiness

16. Leadership actively promotes innovation and technology.
17. Agents receive training on new tech tools.
18. Our culture rewards experimentation and learning.
19. We allocate budget for digital upgrades.
20. We share data and insights across the team regularly.

Strategy & ROI Focus

21. We've defined clear goals for AI (lead gen, conversion rates, efficiency).
22. We measure marketing ROI consistently.
23. We assess new tools based on ROI and ease of use.
24. We plan to allocate resources toward AI implementation in 2025.
25. Leadership understands how AI impacts our competitive edge.

**Now, add up each section's subtotal to measure your agency's readiness in that domain.
Then, add all the subtotals to get your total readiness score.**

Total Score & Readiness Level

Level	Score	Meaning
Just Getting Started	0–40	You're still manual; begin with CRM cleanup and simple automation.
Foundation Ready	41–80	Systems are set up; time to build your AI marketing and sales roadmap.
Growth Mode	81–125	You're AI-ready; implement advanced automation and predictive analytics.

NEXT STEPS

Turn Insight into Action

You've completed the checklist!
Now turn your results into strategy.

Book a **free 30-minute AI Strategy Session**
with Navigent AI Consulting.

We'll review your score, identify your
top 3 AI use cases, and outline a roadmap
for your agency.

About Navigent AI Consulting

Navigent AI helps real-estate agencies
integrate AI strategically, improving lead
generation, marketing efficiency, and client
engagement.

"We don't just bring technology. We build
clarity, efficiency, and growth."

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