

REAL ESTATE DIALER SETUP CHECKLIST

From lead list to an explainable first call block

1 CAMPAIGN

- ☐ One market, source, purpose, and owner
- ☐ Seller identity and list name agree
- ☐ Raw source file and acquisition details saved

2 SOURCE FILE

- ☐ Unique headers and one usable phone field
- ☐ Property and mailing addresses identified
- ☐ Source, notes, and suppression flags preserved

3 ELIGIBILITY

- ☐ Internal do-not-call requests applied
- ☐ Applicable federal and state rules reviewed
- ☐ Local time, identity, consent, and records covered

4 IMPORT

- ☐ Phone and contact context mapped from samples
- ☐ Keep or update existing contacts chosen
- ☐ Ready, invalid, duplicate, and match counts reconcile

5 OUTCOMES

- ☐ No answer, bad number, and do-not-call defined
- ☐ Callback includes owner, time, and reason
- ☐ Lead and appointment handoff is clear

6 CALLING PATH

- ☐ Caller ID displays and return call reaches you
- ☐ Agent phone is verified and PIN connects
- ☐ Headset, microphone, and internet pass

7 CONTROLLED TEST

- ☐ Fictional records and controlled phones only
- ☐ Normal, no answer, callback, and opt-out tested
- ☐ Second-answer flow tested for multi-line sessions

8 FIRST BLOCK

- ☐ List, eligible count, identity, and capacity reviewed
- ☐ Every result saved before calling continues
- ☐ Session report and promised follow-up reconcile