





# Real Estate Lead Response & Escalation Workflow - Setup Guide

## Overview

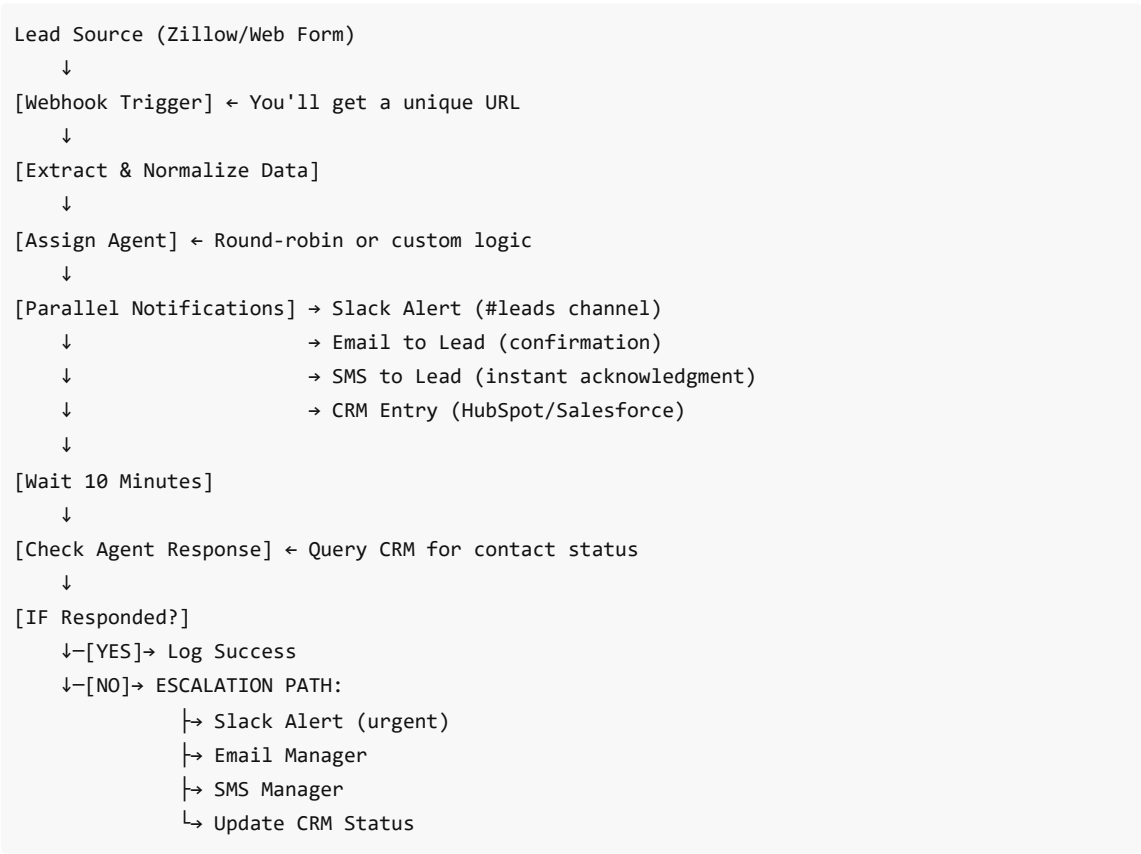
This n8n workflow ensures **no lead is lost** by:

-  Responding to leads within **5 minutes** via SMS, email, and Slack
-  Automatically **escalating** to backup agents if no response after 10 minutes
-  Creating CRM records for full tracking
-  Capturing leads from Zillow, Realtor.com, web forms, and Facebook Lead Ads

**Business Impact:** Studies show responding within 5 minutes vs. 30 minutes increases conversion by **80%**.

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## Workflow Architecture



## Prerequisites

### 1. n8n Installation

- Self-hosted n8n instance OR n8n Cloud account
- Version: n8n 1.0+ recommended
- [Installation Guide](#)

## 2. Required Integrations

You'll need accounts and API credentials for:

Service	Purpose	Free Tier?	Alternatives
<b>Slack</b>	Team notifications	✓ Yes	Discord, Microsoft Teams
<b>Email (SMTP)</b>	Lead confirmations	✓ Yes (Gmail)	SendGrid, AWS SES, Mailgun
<b>SMS Provider</b>	Instant lead acknowledgment	⚠ Pay-as-you-go	Twilio, Vonage, MessageBird
<b>CRM</b>	Lead tracking	⚠ Limited	HubSpot, Salesforce, Airtable, Pipedrive

## Installation Steps

### Step 1: Import Workflow to n8n

1. Open your n8n instance
2. Click **"Workflows"** → **"Import from File"**
3. Select `realtor-lead-workflow.json`
4. The workflow will appear with all nodes configured

### Step 2: Configure Credentials

The workflow requires **4 credentials**. Configure each one:

#### A. Slack Credentials

1. In n8n, click on the **"Slack Alert"** node
2. Click **"Create New Credential"**
3. Choose **OAuth2** method:
  - Go to [Slack API](#)
  - Create new app → "From scratch"
  - App Name: "n8n Lead Alerts"
  - Select your workspace
  - **OAuth & Permissions** → Add scopes:
    - `chat:write`
    - `chat:write.public`
  - Install app to workspace
  - Copy **OAuth Access Token**
4. Paste token into n8n
5. **Update channel:** Edit "Slack Alert" node, change `#leads` to your channel

**Alternative:** Use Discord or Microsoft Teams webhook (replace Slack nodes with HTTP Request nodes)

#### B. Email (SMTP) Credentials

1. Click on **"Email to Lead"** node

2. Create SMTP credential:

#### Option 1: Gmail (Free)

```
Host: smtp.gmail.com
Port: 465
Secure: Yes (SSL/TLS)
User: your-email@gmail.com
Password: [App Password - NOT your Gmail password]
```

To get Gmail App Password:

- Go to Google Account → Security
- Enable 2-Step Verification
- Generate App Password for "Mail"

#### Option 2: SendGrid (Better for bulk)

```
Host: smtp.sendgrid.net
Port: 587
User: apikey
Password: [Your SendGrid API Key]
```

#### Option 3: AWS SES (Enterprise)

- See [AWS SES Setup Guide](#)

3. **Update "From" email:** Edit node, change `fromEmail` to your agent emails

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### C. SMS Provider (Twilio) Credentials

1. Sign up for [Twilio](#)

2. Get:

- Account SID
- Auth Token
- Twilio Phone Number

3. In n8n, click **"SMS to Lead (Twilio)"** node

4. Create **HTTP Header Auth** credential:

- Name: `Authorization`
- Value: `Basic [BASE64 of ACCOUNT_SID:AUTH_TOKEN]`

Or use this format:

```
Authorization: Basic <base64(ACCOUNT_SID:AUTH_TOKEN)>
```

5. **Update the node:**

- Replace `YOUR_ACCOUNT_SID` with your actual SID
- Replace `+YOUR_TWILIO_NUMBER` with your Twilio number

#### SMS Alternatives:

- **Vonage:** Similar setup, different API endpoint
  - **MessageBird:** EU-friendly alternative
  - **AWS SNS:** Enterprise option
  - **Skip SMS:** Remove the SMS node if not needed
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#### D. CRM Credentials (HubSpot Example)

1. Go to [HubSpot API Keys](#)
2. Generate Private App token with scopes:
  - `crm.objects.contacts.write`
  - `crm.objects.contacts.read`
3. In n8n, create **HTTP Header Auth** credential:
  - Name: `Authorization`
  - Value: `Bearer YOUR_HUBSPOT_TOKEN`

#### CRM Alternatives:

##### Salesforce:

```
// Replace HubSpot node with Salesforce API
URL: https://yourinstance.salesforce.com/services/data/v57.0/subjects/Lead
Headers: Authorization: Bearer YOUR_SF_TOKEN
```

##### Airtable (Simple & Visual):

```
// Use n8n's built-in Airtable node
- Easier setup than HubSpot
- Visual interface
- Free tier: 1,200 records
```

**Pipedrive, Zoho CRM:** Use respective n8n nodes

##### No CRM?

- Use **Google Sheets** as a simple database (n8n has native node)
  - Or use **Airtable** (excellent free tier)
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### Step 3: Customize Agent Assignment

Edit the **"Assign Agent"** Code node:

```
// UPDATE THIS SECTION with your real agents
const agents = [
  {
    id: 1,
    name: 'Sarah Johnson',
    email: 'sarah@yourrealty.com',
    phone: '+1234567890',
    slack_id: '@sarah'
  },
  {
```

```

    id: 2,
    name: 'Mike Chen',
    email: 'mike@yourrealty.com',
    phone: '+1234567891',
    slack_id: '@mike'
  },
  // Add more agents...
];

// UPDATE MANAGER/BACKUP
const manager = {
  name: 'David Thompson',
  email: 'manager@yourrealty.com',
  phone: '+1234567899',
  slack_id: '@manager'
};

```

#### Advanced Assignment Logic:

- Add availability schedules (working hours)
- Integrate with calendar APIs
- Territory-based assignment (zip codes)
- Performance-based routing

### Step 4: Configure Lead Sources

Once activated, the webhook will provide a URL like:

```
https://your-n8n-instance.com/webhook/realtor-lead
```

#### Connect this URL to:

##### Zillow Integration

- Contact Zillow API support for webhook setup
- Provide the webhook URL
- Map Zillow fields to your webhook payload

##### Realtor.com

- Similar to Zillow - request webhook access
- Configure webhook endpoint

##### Facebook Lead Ads

1. Go to Facebook Ads Manager
2. Select your lead ad
3. **Leads** → **Download** → **CRM Integration**
4. Use n8n's **Facebook Lead Ads Trigger** node (easier than webhook)
  - Or send to webhook via Zapier/Make

##### Custom Web Forms

Add this JavaScript to your website form:

```
document.getElementById('lead-form').addEventListener('submit', async (e) => {
  e.preventDefault();

  const formData = {
    name: document.getElementById('name').value,
    email: document.getElementById('email').value,
    phone: document.getElementById('phone').value,
    message: document.getElementById('message').value,
    source: 'website'
  };

  await fetch('https://your-n8n-instance.com/webhook/realtor-lead', {
    method: 'POST',
    headers: { 'Content-Type': 'application/json' },
    body: JSON.stringify(formData)
  });

  alert('Thank you! An agent will contact you within 5 minutes.');
```






## Step 5: Test the Workflow

Use the included test payload:

1. In n8n, click **"Execute Workflow"** (play button)
2. Or use `curl` :

```
curl -X POST https://your-n8n-instance.com/webhook/realtor-lead \
-H "Content-Type: application/json" \
-d @webhook-test-payload.json
```

### 3. Check results:

-  Slack message appears in #leads
-  Email sent to lead
-  SMS delivered (check Twilio logs)
-  CRM contact created
-  After 10 minutes: Check escalation (will trigger if mock response check returns false)

## Step 6: Customize Response Check Logic

**IMPORTANT:** The "Check Agent Response" node is currently a MOCK.

Replace this Code node with actual CRM queries:

**Example for HubSpot:**

```
const leads = $input.all();
const results = [];

for (const lead of leads) {
```

```

// Query HubSpot for contact status
const response = await $helpers.httpRequest({
  method: 'GET',
  url: `https://api.hubapi.com/crm/v3/objects/contacts/${lead.json.crm_contact_id}`,
  headers: {
    'Authorization': 'Bearer YOUR_TOKEN'
  }
});

// Check if "contacted" status is set
const agentResponded = response.properties.lead_status === 'contacted';

results.push({
  json: {
    ...lead.json,
    agent_responded: agentResponded
  }
});
}

return results;

```

#### Alternative Methods:

- Check for email reply (Gmail API)
- Check for logged call in CRM
- Use Slack thread replies as indicator
- Manual agent check-in via webhook

## Advanced Customizations

### Add OpenRouter AI (Optional)

You mentioned having OpenRouter API access. Here's how to enhance the workflow:

#### 1. AI Lead Scoring:

```

// Add after "Extract Lead Data" node
const leadData = $input.first().json;

const response = await $helpers.httpRequest({
  method: 'POST',
  url: 'https://openrouter.ai/api/v1/chat/completions',
  headers: {
    'Authorization': 'Bearer YOUR_OPENROUTER_KEY',
    'Content-Type': 'application/json'
  },
  body: {
    model: 'anthropic/claude-3.5-sonnet',
    messages: [{
      role: 'user',
      content: `Score this real estate lead 1-10:

```

```

        Name: ${leadData.lead_name}
        Message: ${leadData.property_interest}
        Source: ${leadData.lead_source}

        Return JSON: {score: X, priority: "high/medium/low", reason: "..."}`
    ]]
  }
});

const aiAnalysis = JSON.parse(response.choices[0].message.content);

return [{
  json: {
    ...leadData,
    ai_score: aiAnalysis.score,
    ai_priority: aiAnalysis.priority,
    ai_reason: aiAnalysis.reason
  }
}];

```

## 2. AI-Personalized Responses:

- Generate custom email/SMS based on lead's message
- Suggest properties based on inquiry
- Predict lead intent (buyer vs seller vs renter)

## 3. AI Agent Assignment:

- Match lead to best-fit agent based on expertise
- Analyze past performance data

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## Add Database Logging

For analytics and reporting, add PostgreSQL/MySQL logging:

```

// Add node after parallel notifications
INSERT INTO leads (
  lead_id, name, email, phone, source,
  assigned_agent, timestamp, status
) VALUES (
  '{{ $json.lead_id }}',
  '{{ $json.lead_name }}',
  '{{ $json.lead_email }}',
  '{{ $json.lead_phone }}',
  '{{ $json.lead_source }}',
  '{{ $json.assigned_agent_name }}',
  '{{ $json.timestamp }}',
  'new'
);

```

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## Monitoring & Optimization

### Key Metrics to Track

1. **Response Time:** Average time from lead to first contact
2. **Escalation Rate:** % of leads escalated (target: <10%)
3. **Conversion Rate:** % of leads that become clients
4. **Source Performance:** Which sources convert best

### Add Dashboard

Create a Slack dashboard with daily stats:

```
📊 Daily Lead Report
-----
Total Leads: 47
Avg Response Time: 3.2 min
Escalations: 4 (8.5%)
Top Source: Zillow (23 leads)
Top Agent: Sarah (12 leads, 4 conversions)
```

## Troubleshooting

### Webhook Not Receiving Data

1. Check webhook URL is correct
2. Test with `curl` command
3. Check n8n logs: Settings → Executions
4. Verify lead source is sending POST requests

### SMS Not Sending

1. Verify Twilio credentials
2. Check Twilio account balance
3. Verify phone number format (+1XXXXXXXXXX)
4. Check Twilio error logs

### Email Failing

1. Test SMTP credentials manually
2. Check spam folders
3. Verify email quotas (Gmail: 500/day limit)
4. Use SendGrid for better deliverability

### CRM Not Creating Contacts

1. Verify API token permissions
2. Check required vs optional fields
3. Test API endpoint with Postman
4. Review n8n execution logs for error details

### Escalation Not Triggering

1. Verify "Check Agent Response" logic
2. Check Wait node duration

- 3. Test IF node condition manually
- 4. Review execution timeline in n8n

### Security Best Practices

- 1. **Environment Variables:** Store API keys in n8n environment variables
- 2. **Webhook Security:** Add authentication token to webhook URL
- 3. **Data Encryption:** Use HTTPS for all endpoints
- 4. **Access Control:** Limit n8n dashboard access
- 5. **PII Compliance:** Ensure CRM complies with GDPR/CCPA

### Scaling Considerations

#### High Volume (100+ leads/day)

- 1. **Add Queue System:** Use Redis or RabbitMQ
- 2. **Separate Workflows:** Split notification and escalation into separate workflows
- 3. **Database:** Move from API calls to dedicated database
- 4. **Load Balancing:** Use n8n queue mode
- 5. **Rate Limits:** Add throttling to avoid API limits

#### Multi-Office Setup

- 1. Territory-based routing
- 2. Office-specific Slack channels
- 3. Regional agent pools
- 4. Timezone-aware assignment

### Cost Estimates

Based on 100 leads/month:









Service	Cost	Notes
n8n Cloud	\$20-50/mo	Self-hosted: \$0 (server costs apply)
Twilio SMS	\$7.50/mo	\$0.0075/SMS × 100 leads
HubSpot	Free-\$50/mo	Free tier: 1M contacts
SendGrid	Free	100 emails/day free tier
Slack	Free	Free tier sufficient
OpenRouter AI	\$1-5/mo	Optional, pay-per-use
TOTAL	~\$30-115/mo	ROI: 1 extra closed deal pays for years

### Support & Resources

- **n8n Documentation:** <https://docs.n8n.io>
- **n8n Community:** <https://community.n8n.io>

- **Template Library:** 2,700+ workflows at <https://n8n.io/workflows>
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## Next Steps

1.  Import workflow
2.  Configure 4 credentials (Slack, Email, SMS, CRM)
3.  Update agent list in Code node
4.  Test with sample payload
5.  Connect to lead sources (Zillow, web forms)
6.  Activate workflow
7.  Monitor first few leads closely
8.  Scale and optimize!

**Questions?** Check the configuration guide or n8n community forums.

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