
Choosing & Using a Contact Manager or CRM

Customer Relationship Management
for Real Estate Licensees & Teams



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Foreword

How to use the links:

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When you see (Back) it will take you back to the last thing you were reading before you clicked on that link.

Any time you see a highlighted word, it is a link either to another place in this book, or to a Web page.

Part 1 – What to expect when you're inspecting

What is CRM?

Who should read this book?

You cannot really grasp how much a CRM will help you until...

Do not buy a CRM unless...

This book is not about how to become a top producer

Some *Don'ts* about choosing a CRM

Warning – Do not believe everything you read online

Cost

Part 2 – A day in the life of an organized agent

CRM in real life

Part 3 - Specific considerations when choosing a Contact Manager or CRM

Your aptitude

Your needs

PC versus Mac

Product market niches

Longevity
Web based vs. desktop
Cost of web based vs. desktop
CRM Resellers
Program vs. content
How much of your data can be exported?
Tech support
Why you should choose your CRM before choosing your phone
 Getting your CRM data form your phone
Automatically adding e-mail leads
Try not to separate CRM, e-mail, and calendar
 Use your CRMs e-mail client

Part 4 – Great expectations

Are you a Real Estate licensee, or a part time programmer?

Using Real Estate specific versus generic CRMs

Hiring someone to build the perfect CRM for you can be a mistake because...

Online Transaction Management Platforms (OTMP's) vs. CRMs

Part 5 - Data

Backing up? Ignorance is NOT bliss!

How safe is your data?

Part 6 - Learning how to use your CRM

Adding contacts
 Categorizing contacts
Adding Properties/Transactions
Targeted Marketing
Are you using your CRM to follow up?
What are activity plans?
Building Activity plans
So are you, you know, using yours?

Part 7 - A History of CRM in Real Estate

Part 8 - Real Estate CRM Features & Definitions

Activities & Activity Plans
Announcements
API
Calendar
Calling manager
Capitalize

Categories/Contact Types/Classifications
CMA software
Commissions
Contacts
Content
Contract forms software
Currency exchange rates
Dashboard layout
Data
Desktop publishing
Directions
Documents
E-mail
Equipment tracking
Financial
Follow-up
Hard Coded
Hierarchy of permissions
History
IDX
Imports from...
International settings for currency/date/time
Leads
Linking
Lists
Mastermind calls
MLS interface
Most recent items available
Multilingual
Multiple windows open at once
PDA's/Phones
Property module
Production stats
Project tracking
Reporting
Screen Generator
Search capability
Social networking media
Text messaging
Training
Upgrades/Updates
Web page integration
Word processing
WYSIWYG

About the author