

Yet another benefit was the ability to have activities from action plans or drip campaigns automatically posted to your calendar, on the days on which you needed to do them.

CRMs are contact managers after a lot of major weight training. Outlook is a contact manager. Top Producer or Advantage Xi are CRMs. They simply do more, better, faster.

In the rest of this book, just to make things easier, we will usually just use the term CRM, when in fact some times we may be referring to a contact manager. In all cases, we will be speaking about CRMs which are Real Estate specific, meaning they were created for use by Real Estate licensees.

Who should read this book?



This book is for a Real Estate agent or team who has determined that they want to grow their business significantly, while at the same time having more of a personal life with:

- Less stress for you and your clients
- Less mistakes
- Better service to your clients
- Less staff
- More compliments from everyone you work with
- More referrals.

This book is for you if you need something that will enable you to be more efficient and organized in some or all of the following areas. It leans more towards the agent who finds himself or herself in need of a powerful tool to propel them forward on to more production and greater automation. That said, that is not everyone's need.

- **Prospecting** – Get suspects, turn them into prospects, and turn *them* into sales. Know who they are, what they want, and when they want it, all in significant detail. Be reminded to capitalize on that information automatically.
- **Lead distribution and tracking** – The ability to give out a lead to a team member, and then follow up to see if that member is doing what you want them to do to capitalize on that lead.
- **Lead source tracking** – Knowing where your business is coming from and spending your marketing time and money accordingly/wisely.
- **Referral tracking** – Knowing who is referring you the most business, so you know who to do more for in return.
- **Contact management** – That means everyone including suspects, prospects, clients, vendors, friends, relatives, and neighbors. Know how to find any information on anyone, even from many years ago, with a few clicks virtually instantly.
- **Mail merge** – Do all print or e-mail merging from within the CRM eliminating redundant external databases.
- **E-mail management** – How many e-mails are in your inbox, or in an overburdened folder filing system? They should be with your contacts or with the property, where you can find them quickly, not in your inbox.
- **Document management** – Store all documents and photographs relevant to a transaction with the transaction record and/or the contact record. If you are ever challenged legally, having a complete paper trail all in one location is invaluable.
- **Appointment management** – The ability to not only track when and where you had an appointment with someone, but also have the ability to note the substance of that appointment.

- **Listing coordination** – The biggest complaint lodged against Real Estate agents has always been poor communication. A comprehensive, automatically executed listing plan enables you to turn those complaints into praise, effortlessly and automatically.
- **Closing coordination** – Too many details can fall through the cracks. The busier you get, the more details you have swimming around in your head. Every day you have to make many decisions regarding what actions you need to take for which transactions. Even the best paper list and file methods are rife with bottlenecks and inconsistencies. Having all the information you need in one place, as well as a to-do list automatically posted on your calendar, makes your job far easier and less stressful.
- **Communications documentation** – Also known as *History*, there is a place where it all comes together. History is comprised of notes, tasks, phone calls, e-mails, letters, post cards, fliers, and appointments. You will have a contiguous record of everything that has happened with that contact or transaction.
- **Time management** – Having automated to-do lists, and organized methods of consistent follow-up. Decide what you want to do once in any given situation, and automatically follow up that way every time from then on.
- **Risk reduction** – Knowledge is power. If you use a CRM properly and consistently, you will automatically gravitate towards centralizing the huge volume of detail with which you work every day. It cannot be overemphasized how important it is to have a contiguous chronological accounting of any communications you have with clients and even prospects. You can be challenged at any point about a myriad of issues from Fair Housing Violations to Mortgage Fraud, Procuring Cause, and any number of other things. A CRM can easily and automatically organize you. Having complete records of phone calls, letters, e-mails, appointments, etc., insures that you will enjoy a much better position from which to defend yourself if need be.
- **Post closing follow-up/client retention** – Not staying in touch with past clients is one of the single biggest causes of lost of income in the Real Estate sales industry. Never lose another referral due to your failure to stay in touch.
- **Staff training and accountability** – Personnel retention is a problem that never goes away. Having a system in place with notes built into the CRM task lists significantly diminishes the impact of a lost staff person. It enables you to have the new person step right into a tried and true system, and none of the details are lost in the transition from the old person to the new one. Additionally, it provides a clear picture of exactly what is being accomplish by whom each day, concerning each individual's responsibilities.

CRM is the kind of software needed to do these things. Therefore, if you need to do some or all of these things, you need a CRM solution.

You cannot really grasp how much it will help you...



Occasionally when you are working with a buyer or a seller, do you find yourself thinking, “They have absolutely no clue how incredibly complex this whole transaction is from start to finish. They can read all they want about it, feel they have become quite expert on the subject, and still have no real appreciation for it all.”

Until you use a CRM to the point where you can no longer see yourself getting along without it, you too cannot possibly appreciate how much of an impact it will have on your business, and even on your life.

If you invest the necessary time to truly use and develop a good CRM as more than just a glorified Rolodex, you will look back some day and wonder how you ever grew your business, stayed in business, and kept your sanity without it. It will be the single most all-pervasive choice