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:

When you see an arrow like this — if you click on it, it will take you back to the table of contents at that point.

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

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Program vs. content
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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

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Backing up? Ignorance is NOT bliss!

How safe is your data?

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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

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Commissions

Contacts

Content

Contract forms software

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Dashboard layout

Data

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Directions

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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