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

CRM in real life

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We will now walk through a scenario made possible by using a CRM solution to its maximum potential. It is important to note that there are several CRMs available today that will do the vast majority of what follows. This is no futuristic pie in the sky dream. Agents organized with an existing CRM who look far too calm to be doing as much business as they do, do this every day. The author was doing most of this as far back as the early 1990's closing 40 – 50 transactions per year with one part time assistant and a buyer agent! The only major difference was paper versus e-mail.

Many people have a mistaken perception of what must be done to make this possible. Many think that you have to live in front of your computer all day long for this to become a reality. If that were the case, then how do others do it? How do agents with no assistant do 30 or 40 transactions a year and still have enough time in the office to accomplish the following scenario? The reason they can is that doing the following actually gives them *more* time to get everything done.

Let's start it with an open house on Sunday. You meet a prospect, *Suzy Stickler* at the open house and determine that you want to follow up with her, especially because her home is in your geographic farm. A good idea by the way, is to hand your open house visitors a clipboard with one visitor form on it. It turns out that people are significantly more likely to complete it when they have the clipboard and pen in their hand, and have to return it to you. So while you are at the open house, you put her contact information into the CRM. You then launch your *Open house medium buyer* follow-up activity plan. In the plan you set Day Zero in the plan as Sunday, the day you met her.

Open House Medium Buyer Plan - Day 1 – You open your CRM on Monday morning and on part of your *To-Do Today* screen there is a button next to where it says *37 e-mails due out today.* You click on that button that says *Process all*, and those template e-mails are all sent out to the various individuals in the many plans you have running. One of them was to Suzy Stickler. It was a pre-selected e-mail from your activity plan that is individually addressed *To: SuzyStickler@ISP*.net. The e-mail starts out with *Dear Ms. Stickler, It was a pleasure meeting you at my open house at 37 Maple Avenue yesterday, etc., etc.* Note that it was not necessary to key in her e-mail address or the open house address into that e-mail. It automatically filled that information in, because it *merged*[3] it automatically because you keyed it into her contact record once. You will never have to key it anywhere again in any of the correspondence you have with her, to include e-mails, letters, envelopes, fliers, post cards, or contract forms.

Day 3 – You open your CRM and part of your *To-Do Today* screen says *16 Phone Calls*. One of them has Suzy Stickler's name, and a description that says *OH Medium Buyer - First Follow-up call*. You click on Suzy's name in that phone call reminder and it opens her contact record, and you see that she got the e-mail you sent, and she opened it. If you had a partner or assistant and you had decided to allow it, they would be able to read that e-mail in Suzy's contact record on their computer as well. No *CCing* back and forth would be necessary any more. So you click on her phone number, it opens Skype, dials her phone number, and pops open a box that says *Phone Log* on it. It has the time and date already keyed in. You speak with Suzy, this call being simply to re-enforce her memory of you. You then key the important parts of your conversation into that *notes* box that popped up. That becomes a permanent part of her record that anyone on your team with permission can readily see from his or her computer. It is no longer necessary to

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[3]*Merge* fields look something like <<first_name>>. If that is in a *merge* document, it will automatically fill in the first name of the contact to whom you are sending the flier.

be running around the office looking for the file to get that information. If the information were in the file at all, it would likely be on a sticky note – somewhere in that mess.

Day 4 – You open your CRM and part of your *To-Do today* screen says *12 Letters Due out today*. You click on that, and on an option that says *Process all*, and those letters are printed out, followed by the envelopes. One of them was to Suzy Stickler. It was a pre-selected letter that is addressed specifically to her and starts out with *Dear Ms. Stickler, It was a pleasure speaking with you. Just a reminder, we met at my open house on 37 Maple Avenue on Sunday the 14th. I am writing to make sure you have my contact information. Enclosed please find a business card magnet with my info on it. I realize your search is several months out, so I'll give you some time now, and follow-up in the future if that's OK. etc., etc.*

Day 20 - You open your CRM and part of your *To-Do today* screen says *9 Phone Calls*. One of them has Suzy Stickler's name and a description that says *OH Medium Buyer - Second Follow-up call*. You click on Suzy's name and it opens her contact record and you look at her history. You see the e-mails and letters that she received from you and you open her phone log and refresh your memory about your conversations with her. You click on her phone number, it opens Skype, dials her phone number, and pops open a box that says *Phone Log* on it. It has the time and date already keyed in. You speak with Suzy and key in the important parts of your conversation. This conversation takes an unexpected but happy turn. She wants to list her house with you because she is so impressed with your personalized follow-up.

You schedule an appointment with Suzy for three nights from now, and you cancel the existing *Open house medium buyer* follow-up plan. The tasks you accomplished while that plan was running, remain a part of the history of that contact. The rest are deleted automatically all at once.

3 days later, you open your CRM in the morning and on your calendar appears that appointment you scheduled. If you had a partner or assistant and you had decided to allow it, they would be able to see what you have scheduled for that day as well, because they can see their calendar, your calendar, or both combined in one view. That completed appointment automatically becomes part of Suzy's history because it is *linked* to her contact record.

To prepare for the listing appointment, you need to print out the listing contract and addenda. Since there is an API [4] for your Contract Forms software with your CRM, all the information that you have already keyed into the CRM will automatically populate into your Contract Forms software, saving you the time of having to find and re-key their name address, phone, etc.

At the listing appointment, you show the seller your Activity Plans for the listing process, and the closing process. Others may show them a generic list, but it will be generic and unimpressive compared to yours. The sellers had no idea how complex this process really is. The reality is that they still do not but they have a better idea now. The sellers are impressed as you explain to them that you learned years ago that there are far too many details involved in these transactions to try to remember everything without a system to help. You have invested your time and money into a system that insures that nothing falls through the cracks, and that they are kept up to date consistently with everything that is going on. Not surprisingly, they list with you.

Residential Listing Plan – Day 1

New listing paperwork in hand, you create a listing transaction in your CRM.

- You do not have to key in the seller's names, contact information, or address, because it all transfers automatically from the contact detail screen
- Now you click a few buttons to launch your *Residential Listing Plan*

[4] Application Program Interface – The ability for one program to *talk/interface* with another

- Your contact record for Suzy had her *category* listed as a Seller-Prospect. When you launch your listing plan, one of the many things that happen is that a *Thank you for the listing* letter is scheduled to be printed. When that letter is printed along with all the others due out that day, it automatically completes that activity, stores that letter with the contact, and changes her contact category to *Seller-Active.*
- Having entered certain data into the listing transaction record, including sale price, expiration date, number of bedrooms and bathrooms, and photos, you click a couple buttons, and your full color two page property flier with photos and property detail prints out. In the future any kind of flier, post card, or e-mail flier can be created with a few clicks because all the information has already been keyed in once.
- Click a few more buttons and you have gathered all the appropriate neighborhood address label information, and you are ready to send the *Just Listed* post card you want for this listing.
- A few more clicks and then you click on *Send to Post Cards Galore* and the label information is automatically entered into their database and acted upon. – OR
- You print your own post cards. Your *New Listing Post Cards* are sent out with those same photos and some of the detail on one side, and the neighbors' addresses and your bulk mail bar code on the other.
- You then decide to do an e-mail blast about the new listing to the neighborhood. With a few clicks, you create an e-mail flier specific to the new listing, and with a few more clicks, the e-mail is sent to the whole neighborhood.
- Now you want to send an e-mail blast to your local agents. Since you have retained all the showing agents' names and e-mail addresses from the last several years, you just pull up the category *Showing Agents* and send the e-mail. NOTE: You may have an agreement with certain agents who want to receive new listing and price reduction notifications from you. Absent that understanding, the vast majority of agents complain about receiving listing announcements in their e-mail, so this is not a recommendation, just pointing out that it can be done very easily.
- Next step, distribute it to your social media network. You take that same e-mail (HTML[5]) flier, post it in your Social Media API module in your CRM, and it is automatically posted to your Blog as well as an announcement on Twitter, Facebook, and MySpace.
- Each of these tasks as well as everything else you do for this listing is in the activity plan. As you accomplish each task, you click it as done. When you created the activity plan, you specified that each task either be included in the *Seller Report* or not. Therefore, as you are completing all these tasks, you are automatically compiling a report which will be automatically sent to the seller as part of the plan. One of the tasks for Day 2 is to generate the Seller Report and e-mail it to them. It will tell them everything you just did – the day after you got their listing. Your listing plan can easily detail 15 or 20 tasks in that first day or two. It looks quite impressive on that report. Sending the report is part of the plan, so creating it and sending it takes literally no extra time. It happens automatically when you print or e-mail all the reports due out that day. Another option you have is to automatically generate a Web page containing your report. When you send your e-mails out for the day, it will include one that goes to the clients. In that e-mail will be a URL[6] for the Status page along with a logon name and password to be used by them to gain access. They go online that night and find out in detail what is going on with their listing, and they do not have to call you to do it.
- Some of the tasks in these plans are for you to complete, and some are for your assistant. They are assigned to each of you and are displayed on your respective *Things To Do Today* lists automatically. No post-its, no yelling across the office, no e-mails, no text messages – no forgetting. And when that seller calls, either of you can see exactly what was done and when without having to put the seller on hold while asking the other person the status.

In this scenario, the entire process took less than half an hour. How long does it take *you* now? Do you do all of this? If not, should you be? Would it get you more business in referrals if you

[5] HyperText Markup Language – The predominant language for construction of Web pages.
[6] URL – Uniform Resource locator – It is what we all refer to as a Web site address.

did? Can you tell the seller you do all this and actually accomplish it consistently? Can you *show* the seller you do all this? How much of an aid would this be when you are trying to differentiate yourself from the other agents? This is an every day scenario for agents around the country who have committed to make it happen, but only a very small percentage of agents invested the time to make this a reality. It is not as difficult as you might think. It *is* an elephant though, so what you have to do to get it done is start eating it, one bite at a time.

Now as the listing progresses, your plan reminds you once each week to call them and review their transaction. The client will also be receiving an e-mail or letter occasionally to let them know what is going on *in print or e-mail* automatically. It takes no time or effort, and following up in print makes a tremendous amount of difference in the client's perception of how hard you are working for them. Some of the letters that go out could include:

- Thank You for The Listing Letter
- MLS Copy Cover Letter
- Marketing Recommendation Checklist Letter (Staging letter)

Next come the offer and acceptance. All e-mails and correspondence are kept in the transaction record in the CRM. Every significant move you make is chronicled in there. E-mails, letters, and notes from phone calls and face-to-face conversations, and stored documents.

Now we launch our closing plan. Each day between now and the time we close, we start out our day by looking at the *To-Do Today* screen to see what we have to do for which property today. It is an automated to-do list that will eventually cover easily 80% of what you need to do for all of your listings and pending sales. In the beginning of a transaction it will tell you each day what paperwork is due, which inspections are due, when second deposits are due, etc. As the transaction progresses it will keep you on track for all deadlines, and once again periodically send out e-mails and letters to the clients. Even the fact that some closings happen in 30 days, while some happen in 90, will not confuse the automated schedule of to-do's, phone calls, e-mails, etc. as they come due. A typical list of communication going out to the clients during the closing process may include:

- Buyer After Contract Letter
- Thank You to Agent for Referring Someone
- Thank You to an Unlicensed Person for a Referral
- Buyer Preparation for Settlement Letter
- Closing Inspection Explanation for Your Client Letter
- Closing Inspection Checklist
- Closing Inspection Explanation to Co-op Letter
- Transaction Status Checklist Letter
- Everything is Proceeding Smoothly Letter
- Buyer After Closing Letter
- Thank You to an Unlicensed Person for the Referral After the Closing Letter
- Thank You To An Agent For A Referral After the Closing Letter
- Hope You're Sleeping Soundly in Your New Home Letter
- Thank You to Co-op Letter
- Evaluation Questionnaire Letter

Isn't this the kind of follow-up you always wanted to do? But usually what stops that from happening consistently is that if you are doing any kind of good volume, you run out of time. Personal hand written thank you notes and letters are preferable without a doubt, but when you get busy, that flow of thank you notes and follow-up letters slows down to a crawl, or stops completely. Once you get to two, three, or four transactions per month, it stops until you get an assistant. This is reality gleaned from experience. A thank you in the form of a template e-mail or letter that goes out 100% of the time is far better than a hand written one going out part or none of the time!

When the *Remove yard sign* activity is marked as done, it automatically changes the *Seller-Pending* category to *Seller-Past*.

On closing day another plan is automatically launched. That one will send out a follow-up e-mail once a month for the next ten years. It will also remind you to call them once a year, among many other things.

Here is another potential reality. Six months later, the buyers are talking about taking the sellers to court for not disclosing a settlement crack in the basement. Your first reaction is a grimace, knowing the buyer's attorney will almost certainly involve you in it. Your next reaction is a bit of a smile, because you know you have so much documentation, that you are in good shape.

Another scenario comes to mind about a listing. The husband was still living in the home, while the soon to be ex-wife was living elsewhere. It was a down market in the early 90's, and despite the agent's best efforts, the home was entering its fourth month on the market. The listing agent received a letter from the wife's attorney claiming that the agent was doing a poor job of marketing the home, and should be replaced. Without getting upset, the agent confidently printed out the extensive notes and history of his efforts to market the home, and mailed it to the attorney. The agent never heard from the attorney again.

The initial investment of time to set up these systems is significant. The return on that investment is mind-boggling. The longer you use it, and the more you refine the systems, the more you realize it is one of the best investments you have ever made.