

# Customer Relationship Management Tools:

HARNESS YOUR FULL  
POTENTIAL BY MANAGING  
AND GROWING YOUR  
CLIENT LIST

A REAL ESTATE EBOOK FROM





# CRMs & Your Success

With over 1.3 million active real estate agents in North America, learning and implementing a CRM tool in your business is directly correlated to your career success in both the short and long-term. Like many other real estate agents, you might be wondering “what exactly is a CRM tool and how will it help me?”

LET’S GO OVER THE BASICS OF CRM AND  
SEE WHAT IT CAN DO FOR YOUR CAREER!





# What Will Make You a Top Agent?

Real estate is a people business. The better organized you are with your contacts, the better able you are to convert those contacts into clients and profit.

## HOW TO SUCCESSFULLY MANAGE YOUR CLIENTS

ENGAGE

FOLLOW  
UP

FULFILL  
PROMISES

In order to be truly effective, your methods of organization must be intelligent, intuitive, automated, and mobile. In turn, you'll become better at your job. That's where CRM comes in.

# Customer Relationship Management 101

When you know your business revolves around people, having a Customer Relationship Management (CRM) tool can help you in your day-to-day activities.

A CRM is a tool that gives you the ability to input your contact data into one cohesive place and organize that data in an intelligent way.

Whether that may be a distant cousin of your Great Aunt Nelly, or a stranger you met at a local restaurant, CRM allows you to record and document their personal information, the nature of your relationship, any interactions with the potential lead, and much more.



# What You Need from a CRM

Without a CRM, you waste hours every week searching for contact information. Think of all the other far more productive, money-making activities you could be doing instead. In a business where your personal time and effort will make you a top agent, you need to be thinking about everything you can do to make yourself more efficient.

## WITH A NEXT GENERATION, REAL ESTATE FOCUSED CRM, YOU CAN:

- ✓ Easily input all your contact data from multiple sources
- ✓ Keep record of important and unique characteristics of each contact
- ✓ Categorize contacts into groups for fast searching
- ✓ Nurture and convert leads into clients

# Examples of Customer Relationship Management



**YOUR CRM TOOLS SHOULD PROVIDE QUALITATIVE DATA.**

**Some examples:**

- A List of Who You Should Call Today
- Reminder of the Move-In Anniversary of Past Clients
- Social Media Activity - Which of Your Hot Leads is Posting Daily and the Best Avenue to Reach Out

Each data point inputted should provide your CRM tool enough information to relay back reminders, alerts, and other necessary information you may need to know for managing your contact base.





# What Differentiates CRM Tools from Each Other?

- ✓ Personalized Email Marketing
- ✓ Online Presence
- ✓ Mobile Capabilities
- ✓ Social Media Capabilities
- ✓ Relationship Builder



# Personalized Email Marketing

Email marketing delivers 30 to 40 times the ROI of most other forms of web-based marketing, including social media, making it more necessary than ever to create custom, targeted emails.

Today, people can sniff out your generic template email message from a mile away. **Don't do it.**

Take advantage of the ways in which you can customize your email messages so you're always personalizing for your contact. This includes categorizing, grouping, and segmenting your contacts in a way that directly boosts open rates.



# Build Your Online Presence

HAVING YOUR OWN AGENT WEBSITE IS NOT AN OPTION.  
IT'S A NECESSITY.

Piggybacking onto your brokerage website simply won't do. In this industry, it's about the people, including yourself. One of the best ways you can demonstrate you are a professional, skilled, and dedicated real estate agent is by creating a solid online presence. As you're planning your online presence, look for a CRM that includes personalized real estate agent websites featuring professional, high-quality design, excellent content creation tools, responsiveness across all devices, automatic lead capture, and IDX listings.

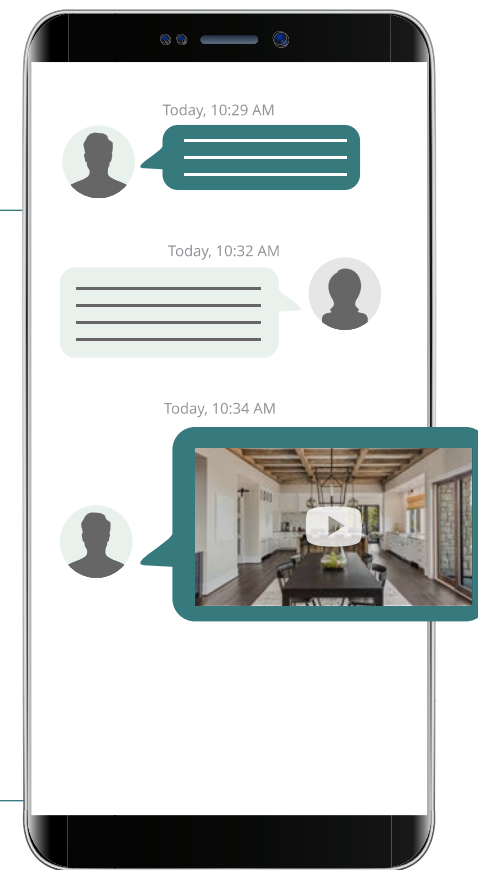
When you create your own website, the biggest question in your mind should be: **How am I different?** Whatever it is, make sure it is clearly communicated on your agent website.

# Mobile Management Capabilities

## THERE'S AN APP FOR THAT

Being on the road all the time, you need a way to respond to leads and clients from your phone. Good CRMs have apps you can use right from your smartphone. This way, when you get pinged with a reminder that it's time to reach out to a contact, you can quickly and easily stay in touch no matter where you are.

- ✓ Send personalized SMS and MMS mass texts including photos and video walkthroughs
- ✓ Receive replies right to your phone
- ✓ Set up text autoresponders to reply to new leads and existing clients instantly
- ✓ Put keywords on riders to get new leads via text messaging



Did you know text message marketing has nearly a 100% open rate? Unlike emails, texts are more personal and almost impossible to ignore.



# Social Media Capabilities

Your CRM needs to be able to help you automate your social media content while providing you unlimited capabilities in what you post and who sees that post. Having a CRM that allows you to easily share content will save you time and quickly grow your social media presence.

- ✓ Select what you want to share
- ✓ Get exclusive videos and articles from top-tier publications curated for you
- ✓ Decide how often you want to post and at what times of day
- ✓ Fully automate your posts so your social media is working on your behalf



# Relationship Builder

An proven method for becoming a top real estate agent is the strategic formation of mutually beneficial partnerships with vendors that relate to your business. Imagine having a strong partnership with a local vendor who wants to have a trusted real estate agent's name they can refer to their customers. Every person that the vendor sends your way is a brand-new lead that should be easily inputted and organized into a good CRM.

## HOW TO CREATE THE PARTNERSHIP

### 1 Think of ways you can meet relatable vendors in your area.

Consider network events hosted by your local Chamber of Commerce, Business Network International, Rotary Clubs and entrepreneur associations, or even start your own.

### 2 Do your due diligence.

As much as you are eager to form partnerships, be sure that you thoroughly vet the companies you're considering. You want to make sure that the services you refer to your clients are ironclad.

### 3 Make a solid plan.

Before you approach potential vendors, map out exactly what you propose, and make sure it is mutually beneficial. Then demonstrate precisely how the partnership will work, and maintain your professionalism so your potential partner knows you're serious.

### 4 Focus on the win-win.

A well-thought-out and aligned partnership benefits everyone. Your clients get trustworthy referrals for the services they need. Your vendor partners get new business from you. And, in return, you get new business from them.



## AN EXCLUSIVE REAL ESTATE CRM FOR YOUR SUCCESS

IXACT Contact is a leading CRM tool used by countless professional real estate agents in the industry to grow their business. Whether you're a new real estate agent looking for ways to effectively and profitably set up your business, or you're a seasoned REALTOR® who wants to advance their career, IXACT Contact has what you need to get the job done.

### HERE ARE JUST A FEW OF THE HUNDREDS OF WAYS THEIR TOOL HELPS REAL ESTATE AGENTS MAKE IT TO THE TOP:

- Have all of your contacts in one place and instantly identify your hottest leads
- Automate your emails and create drip campaigns
- Personalize all communications to build meaningful relationships with your contacts
- Have an impressive and professional agent website to capture new leads online
- Use automated and innovative text marketing to engage your contacts
- Automate your social media with top-quality content curation
- Use their mobile app that lets you do everything from your phone
- Set goals, track your progress, and monitor your overall performance

Try their [free trial](#) and discover how IXACT Contact can get you where you need to be.

# About Us

Founded in 2005, The CE Shop has become the leading provider of online real estate education through an encyclopedic knowledge of the real estate industry.

Our ever-expanding course catalog of Pre-Licensing, Exam Prep, Post-Licensing, and Continuing Education products are trusted throughout the industry and offer agents across the country the education they rely on.

With courses available in all 50 states and D.C., we're driven by a desire to constantly improve, both for ourselves and our students.

