

Keller Williams Agents use PieSync to boost their productivity



“We use PieSync to sync our Google Apps with dotloop. It’s a huge time saver and works great. I highly recommend PieSync!”

Jack Bai, Associate Broker -
[Keller Williams Realty Atlanta](#)

[Keller Williams](#) is one of the major real estate franchise companies in North America. Today, KW proudly sums up more than 177,000 associates and over 930 market centers across the globe.

The franchise is No. 1 in units and sales volume in the U.S. In 2018, Training Magazine inducted Keller Williams into its Hall of Fame of top training organization across all industries in the world.

One of the company’s primary roles is to help agents grow their own businesses. To achieve this goal, Keller Williams encourages its associates to use the best technology available to boost their productivity and improve the customers’ experience. That’s why many Keller Williams agents have chosen PieSync, to create a bridge between their different business tools.



Mark Jacobsen: An extraordinary service FreedomRE.com

Over the last 4 years, Mark Jacobsen has been working as a Realtor with Keller Williams in Lansing, Michigan. Combining the desire to provide an unreal experience for his clients and his passion for technology, Mark relies heavily on top-of-the-line applications.

In this process, automation plays an pivotal role.

"We're moving at a high speed these days, and if you can't automate a manual process you're going to get left behind," says Mark.

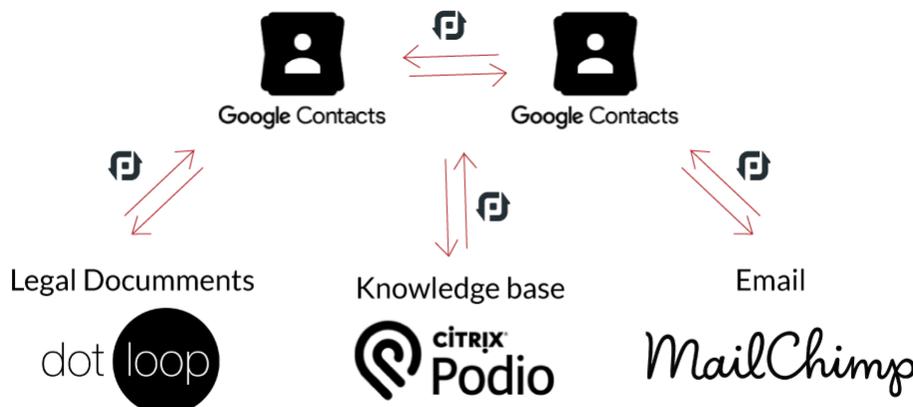
Central to his automated workflow are GSuite, dotloop, MailChimp, and Podio. PieSync comes into play as the solution to connect all these apps and create an effective workflow between them.

Here's an insight of his setup:

It is common for a Realtor to have more than one email address, but Mark needs to have complete visibility of all of his contacts from any account whether at a laptop or on the road. That's why he synchronizes his different GSuite accounts bidirectionally through PieSync. Additionally, he distributes his contacts between systems via different groups, and thanks to PieSync's rule-based feature he is able to maintain this segmentation in each account.

This means that whenever he adds or updates the contact information of any of his clients in one account, this new information is automatically synced to the other email address, and vice versa.

Mark also syncs his Google Contacts with MailChimp. Thanks to this connection, he is able to send out compelling monthly updates to each one of the segments he has identified in GSuite.



When it comes time to close the deal, Jacobsen uses dotloop, a platform that allows him to share and edit legal documents together with his clients. At this point in the transaction, GSuite has already gathered a lot of information about his client and PieSync has automatically synced it with dotloop making sharing and filling forms a breeze.

“For me, the best thing about PieSync is how much time it saves me. I don’t have to export/import contacts between apps or do dual entry anymore. I have everything working in the background. That gives me more time for my clients and allows me to offer that unreal experience they expect” says Mark.

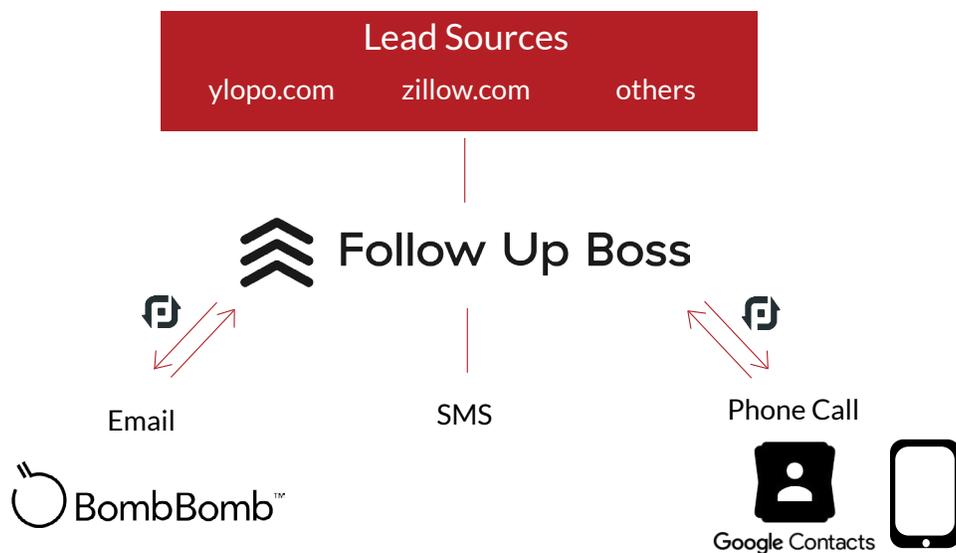


Albert Vasquez: A trustworthy team
[AVRealEstateGroup](#)
[Ylopo.com](#)

With over 10 years in the business, Albert Vasquez is a voice of experience. Throughout the years, he has kept his love for his job and his passion for South Florida intact. He and his team at AV Real Estate Group, successfully transmit Albert’s enthusiasm and knowledge in the different touch-points

they have with clients and prospects.

They’ve created an effective workflow between cloud-based tools to provide timely and relevant communications across the buying/selling process through various channels.



“We want for people to get to know us without being intrusive. That’s why we need to make sure our content is informative and relevant. But not every person in our database has the same interests, that’s the importance of segmentation,” says Albert.

With PieSync’s rule-based feature, Vasquez is keeping over 20 different groups in sync between FollowUpBoss and Google Contacts. Each group enters a personalized workflow and receives personalized interactions.

For them it’s important to add authenticity to their communications, they know it’s not only about showing themselves as sellers, but about earning the trust of their client.

Albert detected the importance of face-to-face interaction and on a big scale, video is the best resource to achieve this type of synergy. That’s why one of the first touchpoints with the clients is a welcome video introducing Albert and letting the consumer know that a buyer specialist in his team will be reaching out.

This message is sent out through BombBomb, an email marketing tool specialized in video format.

“Before PieSync I was using the existing integration between FollowUpBoss and BombBomb, but there were some limitations on what I could do with it, says Albert.

“During the client’s cycle, the interaction with different members of the team is necessary, but FollowUpBoss only allowed us to have one sender per client.”

Therefore, after sending out the first email with his introduction video, Vasquez had to go to each client’s profile and assign him/her another member of his team. With PieSync this process is done automatically. Albert defined certain conditions to automatically assign each new client to a particular list and then trigger the right actions for the clients on that list.

“Even if you have a great app, the truth is that every technology has a limit. The wonderful thing about PieSync is that it helps you overcome that limit.”



Luke Weathers: And his remarkable family business TheWeathersTeam.com

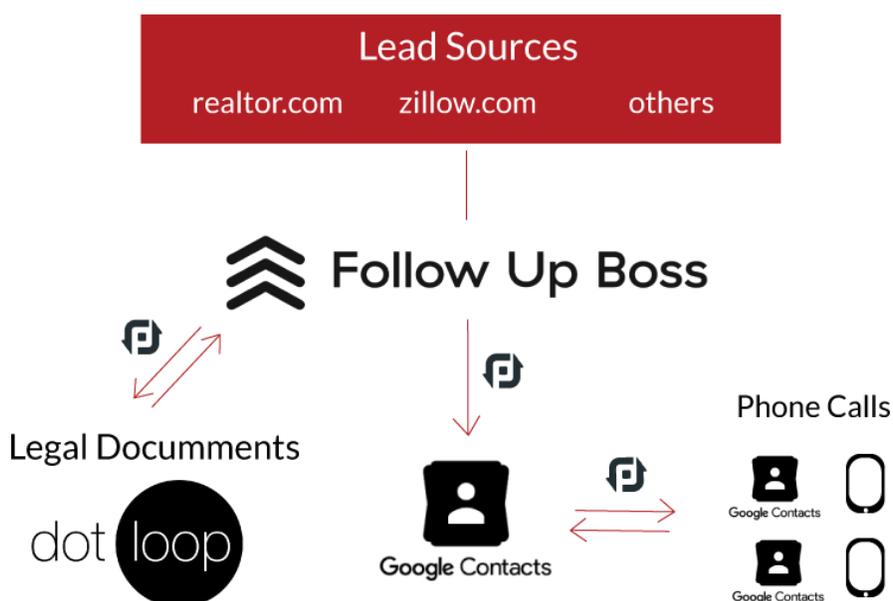
Luke grew up in Atlanta, the city where he now works as a real estate agent. He is a licensed realtor with Keller Williams and The Weathers Team, his family business. This second-generation realtor does not let the size of his team be an impediment to reach out to large amounts of prospects and run a great business.

He is using technology as a key ally. *“There’s no way we could do business without the digital tools we have,”* says Luke. Among his software stack he has dotloop, Google Contacts next to other GSuite tools, and FollowUpBoss to centralize his database.

“FollowUpBoss is the place where I collect my contacts information from different sources: Zillow, realty.com, etc. I also use it to send out text messages and other communications to keep my clients well-informed throughout the entire process.”

But for a realtor there’s much more to it than just office work. They need to be out there, interacting with buyers and sellers, and sometimes running the business from their phones.

That’s where PieSync steps in.



“When I’m in the car I want to know who is calling, and PieSync helps me with that. Every single contact I have in FollowUpBoss is in sync with Google Contacts and therefore on my phone,” says Luke.

“It happens very fast! Sometimes the prospect just clicked on a website and decided to give us a call. By that time I already have his contact information on my phone and I can start a conversation with a clear idea of who this person is.”

Furthermore, The Weather Team keeps their different GSuite accounts in sync with PieSync. That way, every member of the team can access the most up-to-date clients information, no matter who entered the data or from which device.

“PieSync is the piece that keeps everything together. It’s really helping our business to connect our tools and providing us with a single source of truth,” says Luke.

About PieSync

PieSync works in the background and syncs your contacts two-way and in real time. This means you’ll have access to the most up to date customer information, no matter where you are or who entered the data. PieSync will help you to:



Set it and forget it



No more import/export



Avoid manual errors



Have all contacts available on your smartphone



Share contacts with your team



Save time spent on data entry