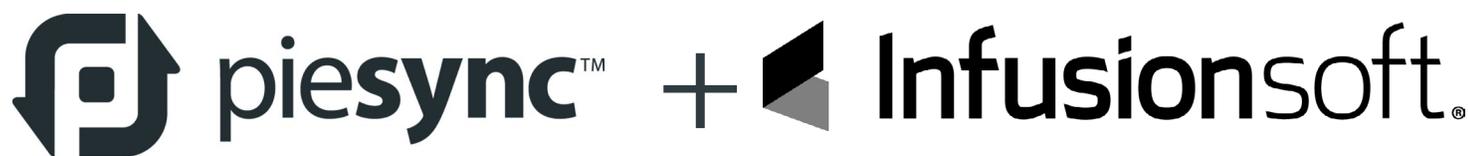


# Keeping Infusionsoft, Gsuite and dotloop in sync

## The story of a highly productive realtor



[www.viewelpasohomes.com](http://www.viewelpasohomes.com)



**El Paso, Texas.** Brian Burds is a sharp agent. Next to his “client first” philosophy, he is an extraordinary team leader. He got into real estate right after college, and since then he has been developing and implementing a successful marketing strategy to run his real estate business. His secret? He is using top of the line technology to increase his productivity and reach out to clients and prospects effectively.

*“I’m always trying to find easy ways to automate repetitive tasks. I believe technology is there to make our lives easier, and the easier I make my agents lives the more productive and happy they are. My goal is to not necessarily add employees but to simplify employees’ lives,” says Brian.*

### The Challenge

Infusionsoft is the heart of his software stack. This CRM collects the contact information that all the other tools gather along the customer’s lifecycle. Infusionsoft allows Brian to track sales opportunities and campaigns results seamlessly.

*“We use Infusionsoft for almost everything. We use HTTP Post to push out data, launch most of our campaigns through our CRM, etc. We try to automate the business process as much as possible, even to the point of use Infusionsoft with FixYourFunnel to push data via text,” says Brian.*

Among other tools, Brian and his team are using Google Contacts as a contact management

tool, and dotloop as a productivity optimization and online transaction platform. This last one has become one of the essential tools for realtors across the United States. The Brian Burds Home Selling Team uses it to share documents with buyers and sellers, manage tasks and track transaction progress in real time.

The challenge was to make these tool work together with Infusionsoft.

A connection between Google Contacts and Infusionsoft was necessary to ensure personalized attention to clients and prospect from any device. *“We are sending out text messages automatically to engage in conversations as soon as possible. The problem is that my agents are on the road all the time, and if they get a phone call they won’t know who is calling unless the Google Contacts on their phones and Infusionsoft are in sync,”* says Brian.

Regarding the connection between dotloop and Infusionsoft, the team was aiming to save time and ensure accurate data.

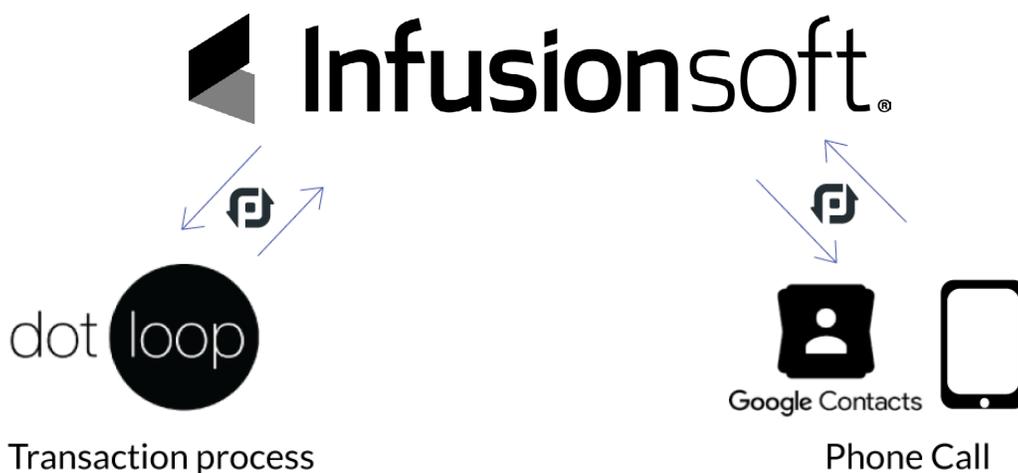
## How PieSync helps

Immediately after Brian Burds began to use PieSync, he obtained results. By keeping a 2-way contact sync with Infusionsoft and Google Contacts, he is offering that personalized touch he was searching for.

*“With this sync I’m making sure my team always knows who is calling. It makes a big difference to pick up the phone with previous knowledge about the person. It takes away that sales-tactic feeling and makes the conversation more effective,”* says Brian.

Another step in the lead processing is voicemail dropping. By automatically syncing the contact information from Infusionsoft into Google Contacts, the connection enables Brian and his team to use a tool that injects a voicemail into the prospect’s phone 3 minutes after a call takes place.

The synchronization between dotloop and Infusionsoft, has also accomplished its objective.



*“To have a connection between dotloop and Infusionsoft has been very powerful, because PieSync opens a dialogue between the apps and quickly populates the information from Infusionsoft to dotloop,” says Brian.*

Before PieSync, this process was made manually by him and his agents. *“Thanks to PieSync we don’t have to go to Infusionsoft copy the customer data and jump to dotloop to add it there too. It’s all done automatically. And that makes my team’s lives a lot easier,”* says Brian.

## The Future

PieSync empowers The Brian Burds Home Selling Team software stack by sending customer information back and forth between apps with the unique information that each app collects. It also makes working in team a lot less complicated.

*“PieSync is particularly useful when it comes to sharing contacts in teams. After seeing how it works, I decided to add connections for other agents of my team. Currently, I’m adding tags to each contact of my database, located in Infusionsoft, to assign them to a specific group. The idea is to use PieSync’s rule-based sync to connect each group of contacts to its corresponding agent. That way each agent has his/her leads on their phone,”* says Brian. This process fend off the hassle of pushing a full database into the agents phones.

We are looking forward to see how this sync works for this savvy realtor and his team!

## 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