BROKERAGE TECHNOLOGY CHECKLIST

A COMPREHENSIVE GUIDE TO SELECTING THE BEST TECHNOLOGY PARTNER FOR YOUR BROKERAGE.

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PRODUCT + PEOPLE = SUCCESS

Real estate technology is ever evolving, and it can be challenging selecting the best technology partner to service your brokerage. To add to the challenge, technology is only as good as the people behind it and busy brokers need to be able to rely on a team of seasoned professionals to handle their tech needs, including training and supporting their agents.

Whether it's building a robust lead generation pipeline, increasing agent recruitment and retention initiatives, evaluating current technology & implementing cost-cutting, consolidation efforts...brokers need to focus TODAY on building a strong FUTURE for themselves & their agents.

Luckily, we've created this helpful checklist designed to help busy brokers best evaluate their real estate technology and vet partners more effectively and efficiently.

> **"SUFFICIENTLY ADVANCED TECHNOLOGY IS EQUIVALENT TO MAGIC."**
>
> **ARTHUR C. CLARKE**

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QUESTIONS TO ASK

FOUR QUESTIONS DESIGNED TO SEPARATE TECH PARTNERS FROM TECH VENDORS.

In a time of increasing margin compression and heightened consumer and agent expectations, outsourcing your tech needs to a software company can accelerate digital transformation to increase business growth and profitability.

Today, brokers need a company that can be more than a vendor.
You need a company that understands the unique challenges facing the real estate industry. You need a company that can help you map out your current and future needs, implement, adopt and continually educate you and your users to maximize your investment. In short, you need a partner.

Use these four questions to eliminate the chaos that comes from choosing the wrong technology vendor and find the perfect partner for your brokerage and your agents.

1. WHO ARE YOUR CUSTOMERS?

Checking a company's references is critical to finding a reliable technology partner. Most technology partners will likely point you to some case studies and/or testimonials from their customers. Although these help, they're not enough.

Ask to talk to existing customers to understand how they are using the solution and what they like and dislike, so that you get the whole, unbiased picture.

2. HOW DO YOU MAKE OUR JOBS EASIER?

A lot of traditional technology systems fail because they focus more on the what and less on the why or how. It's like showing someone how to get in and out of a car without showing them how to drive it. The last thing you need is to burden your agents with another challenging tool. Another set of processes. Another set of buttons to push.

When vetting to a technology partner, ask them how they will make life easier for you and your agents, and then make sure they have a good response.

QUESTIONS...CONTINUED

3. HOW WILL YOU SAVE ME TIME AND MONEY?

A true partner needs to have a strong understanding of your business needs and challenges and present a comprehensive solution to address them.

Make sure they communicate clearly to you cost-benefits, provide ROI calculations, and outline everything from how many man-hours you'll be saving to how their solution and services will improve (and help grow) your business.

4. WHAT HAPPENS AFTER IMPLEMENTATION?

Be clear on what happens in the weeks, months and even years after you go live and onboarding is finished.

A TECHNOLOGY VENDOR...

provides responsive support to provide bug fixes as issues arise.

A TECHNOLOGY PARTNER...

provides proactive support to educate you and work with you to maximize your investment, so you can address challenges before they ever turn into issues. Your technology partner should offer you custom, ongoing training opportunities, an online resource library and access to your Customer Success team.

BROKERAGE TECHNOLOGY CHECKLIST

Use this checklist as part of your vetting process when evaluating the perfect technology partner and marketing CRM. All comprehensive, contemporary real estate CRM's should include these valuable and necessary features.

ADVANCED PRODUCTIVITY CRM

- Quick to learn / Easy to use
- Intuitive user experience
- Mobile-friendly
- Customizable dashboard
- Brokerage, office & agent KPI's (Key Performance Indicators)
- VoIP for in-app texting and calling
- CMA creation wizard
- Document Storage
- Roster mgt. & reporting
- Team capable
- Customer activity tracking
- Customer workflows & task coaching
- Agent-protected databases
- Integrated MLS data-feed
- Broker Recruiting Module

LEAD GENERATION

- Lead parsing
- Paid lead generation (exclusive buyer / seller leads)
- Immediate notification via email and/or text
- Lead routing / assignment

LEAD NURTURING

- Automated email drip marketing, templates & campaigns
- Daily market report emails based on search criteria
- Email reporting
- Automated text outreach

ONLINE MARKETING

- Brokerage, Office & Agent IDX websites
- Built-in blog with automated blog posts included
- Social media integration with Facebook, Twitter, LinkedIn
- Automatic listing video creation with syndication to YouTube
- Integrated MLS data feed, search engine optimized

TRAINING & SUPPORT

- Strategy for onboarding agents
- Ongoing training & support
- On-demand help center
- Telephone, email & chat support

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THE POWER OF ONE

ONE VENDOR. ONE POINT OF CONTACT.
ONE SOLUTION. FOR YOUR ENTIRE OFFICE.

The 1st true productivity platform in real estate offers a more efficient, cost-effective way to increase production & help your agents sell more homes...faster.

ASK US HOW WE DRIVE HIGH AGENT ADOPTION RATES!

BROKERS... MEET THE BOSS

BUSINESS OPERATING SYSTEM & SERVICES

- Brokerage recruiting module
- Brokerage-level advanced dashboard
- Brokerage, office & agent KPIs
- Lead capture / response routing & tracking
- Team capable
- Lead generation, parsing & scrubbing
- Customer activity workflows & task coaching
- CMA Wizard
- Document management
- Agent-protected databases

Schedule your one-on-one consultation with the Elevate Brokerage Development Team by visiting

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or by calling 844.792.0260