CRM REQUIREMENTS

1. Web-based

A real estate CRM software system that can only be used in the office is not a solution. Agents hardly spend most of their day in the office so a solution that works on the move is a must. Data needs to be entered from any location – at the open house, at a showing, meeting, community event, Property hunting etc. Agents can't be slowed down by a solution that doesn't work where all the work is actually done on the go. The CRM has to be mobile friendly for both iOS and android phones. Must be user friendly and the user experience must flow easily.

2. Built-in Website and CMS

Although this is not a must have, it will be nice to have a CRM that have an all-in-one platform for contact, property, transaction and task management, we can also have a website with it, which brings our sales productivity to a whole new level. What exactly does it mean to have a real estate CRM with a built-in website and CMS.

1. You can run your website right from within your CRM account (so only one software platform);

2. you can add multiple sites and still manage them all from within your CRM account (especially handy if you run a franchise network of sites);

3. you can reward your top-performing agents with their own websites;

4. you can expand your partner and affiliate network abroad;

5. you can create your own property portal exclusively available to your franchise network.

6. you can report on, everything! A website is a really shop window with the actual business being the CRM. This is why a combined platform is especially important and useful. This list is far from exhaustive as there are endless opportunities! we need a creative way to operate business where efficiency and effective delivery of service is at the hallmark of this CRM.

3. Contact and Lead Management

real estate CRM software brings each one of our contacts to the center of all marketing communications. The customer-centric approach is the only way to sell in today's digital landscape where agents no longer exclusively hold market information. The customer dictates how the sales process is going to occur and a CRM helps us reflect on this important change.

Below are some of the few points to consider.

• Provides a central platform for keeping all information for each contact as easy to-view records;

• Lets you design a customized sales funnel to track how your leads progress towards the purchase and adjust your marketing activities to a new, better plan;

• Ultimately helps with lead tracking – tracks not just the lead source, but every following interaction as well to power follow-ups;

• Helps you craft a smart follow up strategy and automate follow-ups without losing the personal touch in all conversations with clients (more on the mechanics of that in #5 below);

• Lets you easily manage and track all transactions, commissions, referrals for each contact;

• Allows for easy team collaboration and information sharing – everyone has access to important information from everywhere and anytime.

4. Property Management & Automatic Property Matching

One of the most important features to have in a real estate CRM software is an easy way to manage hundreds of properties and create an easy-to-use property database for lands for sale, commercial properties, Residential properties, Property sharing units etc. Just like with your contacts, a real estate CRM should give you a 360-degree view of each of your properties and everything associated with it which allows for total control. But that's just one of the great benefits the system should offer. In fact, it should be able to do loads more:

• Easily update records for each property to keep everything relevant and accurate; • analyze the quality of your database and check out the ratio of properties based on any criteria: property type, sales status, etc. • write real estate listings and optimize them for SEO; • assign team members to each property; • track all changes.

• Insert addresses or GPS coordinates to know where each and every property is located.

Most of the best real estate CRM software providers will make it easy to keep your property database organized with a set of handy fields which orders all the information.

However, at our company, we think a good CRM must do more than just that, which is why great features around automatic property matching are important. It makes an agent work so much easier. You don't have to manually search your database trying to find the best match. Simply use

the search button and the software automatically finds the best matching deals to whichever customer requirement you chose. As simple as that, and literally in seconds.

Property matching can also work the other way whereby adding a property would alert you of any potential requirements or property already in the system.

5. Property Proposals Automatically Configured For You

Its always a struggle to create a great looking property proposal to impress a client, only to discover that the formatting went all wrong and the structure of proposal leaves all strong points of the property hidden?

creating a well-structured, nicely formatted property proposals and putting this process on fast track is difficult. It shouldn't be though. We strongly believe that a good real estate CRM software should take care of this for us.

For example, a CRM automatically configures a property proposal for any of your properties and you can then send it out to your clients easily. Best of all, you can keep track of all proposals sent and even printed!

Now your follow up is essentially easier because creating and sending out a beautifully formatted and well-structured property proposal takes a few seconds. The software should have well created proposal templates already inserted in the CRM for easy access to send to client and follow up as well.

6. Email/SMS Automation And Follow Up Tracking

Let's admit it, solely relying on your salespeople to handle all correspondence and follow-ups is crazy. As hard-working as your team is, it's easy to miss calls, follow-ups and walk-ins out when there are so many things to do every day.

Here are just a few ways we can use real estate CRM software to simplify follow-ups and put the strain off your daily activities:

• Schedule your emails/SMSs and send them automatically;

• Easily personalize each message to your contacts;

• Connect your inbox to your CRM account and take your correspondence under total control;

• Create a library of templates to send out to clients;

• Track open rates to figure out the best times of day to reach out;

• Automate reminders to follow up and create follow up alerts.

• Integrating other chat services to the CRM like WhatsApp will help with storing all communications in the right space.

Not only do you automate tedious and time-consuming tasks, you pull all of your conversations to one system. This is invaluable for future records, especially when it comes to real estate referrals, you'd like to ask your happy clients for.

So as an agent, this take additional strain off your work and get all follow up activities perfectly setup and automated where appropriate.

As a team manager or business owner, you have a 360-degree view on each of your contacts via a single platform. Use these insights to discuss a follow-up strategy with your team and figure out even better ways to grow your sales reach.

7. Stronger Multichannel Support

Because you'd want to catch up with as many qualified leads as you can, a much larger ecosystem of communication tools is very much appreciated. In a nutshell, you'd want to be available through more than one channel, especially so with mobile.

At the same time, you need to have a good think on how to make multichannel customer support smooth and efficient so it doesn't consume too much of your resources. Either way, it should be integrated with your CRM as otherwise, it's difficult to manage different systems.

The best real estate CRM software providers make it easy to integrate essential support channels such as SMS campaigns and live chat lines to your website. You can use SMS campaigns in addition to your email campaigns and stay on top of your mobile customer's minds. At the same time, live chat will help you catch up with your website visitors in real time and increase the odds of converting them into qualified leads and, eventually, your customers.

8. Social CRM

Whatever you may think of social media, it's not going away, especially for local businesses like real estate agencies. 45% of people walk through a home found on social media. Moreover, 95% of people use Facebook to get themselves familiar with an agent's services.

This makes a socially connected CRM the next important item our list of the best real estate CRM software features to have.

Certainly, we would want our real estate CRM to do the following:

• Automatically post your latest properties to our social media (Facebook, WhatsApp, Line, LinkedIn, Google+, Pinterest); • help you map social signals with social monitoring tools;

• Chat with your fans and followers via a single CRM interface.

Social media is a powerful lead generation channel. A social real estate CRM does a stellar job of helping us leverage it smarter and faster.

9. Reporting and Dashboards

Reporting features are essential to a good CRM as you can only imagine. However, because our team does a lot of work every day, we don't want to overwhelm them with extra tasks like reporting. At the same time, you do need accurate insights into how everyone's performing.

Whenever we need to make an important strategic decision, optimize our work or figure out what needs to be improved, we want to head on to the reporting dashboard and take a look at our most important data. A good CRM generates these reports for you automatically.

One of the best real estate CRM software features is that it makes it really easy to understand important sales and marketing metrics. we can analyze our performance from all angles: per agent, property category, activity, franchise office, location, region, time period, etc.

We Use these insights to decide which activities should be eliminated and which deserve even more investments, and we'll see how our business thrives now that it's backed up by real data.

10. Collaborative Tools and Task Management

There are many outstanding ways a CRM makes team collaboration straightforward and easy. Here are just some of the best real estate CRM software features when it comes to task management:

• Automates reminders, notifications, recurring tasks;

• Lets you schedule your activities and get a full calendar view of the work ahead;

• Makes file and information sharing easy within the team;

• Syncs with your inbox so you don't have to keep switching;

• Lets team managers assign agents to leads and monitor every single activity (proposals sent, emails received etc.).