



AUDIENCE POLL

What CRM Feature Do Rely On Most For Your Business?

- Integration with Other Services
- Organizing Your Contacts/Leads
- Marketing/Keeping You Top of Mind
- Automated Emails/Texts
- Transaction Management



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JULY 2018



BUILD YOUR SPHERE OF INFLUENCE WITH CRM

Hosted by: Jim Marks & Ryan Rockwood

WHAT'S TRENDING NOW

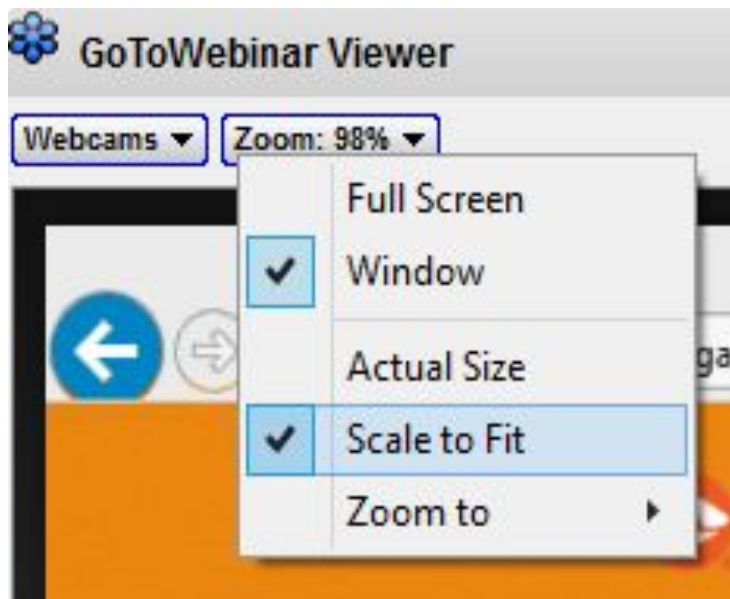
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1) YOU ARE MUTED FOR THE DURATION OF THE WEBINAR

to eliminate noise interference and minimize presentation interruptions. As much as we would love to open the webinar up to discussion, there are too many people to do so effectively.



2) THIS WEBINAR WILL LAST 60 MINUTES

Our goal is to complete our presentation within 50-55 minutes and open up the last 5-10 minutes for questions



3) THIS WEBINAR IS BEING RECORDED

PNC Bank will post the recording on their website (custom link to be given at the end of the webinar)

IMPORTANT HOUSEKEEPING



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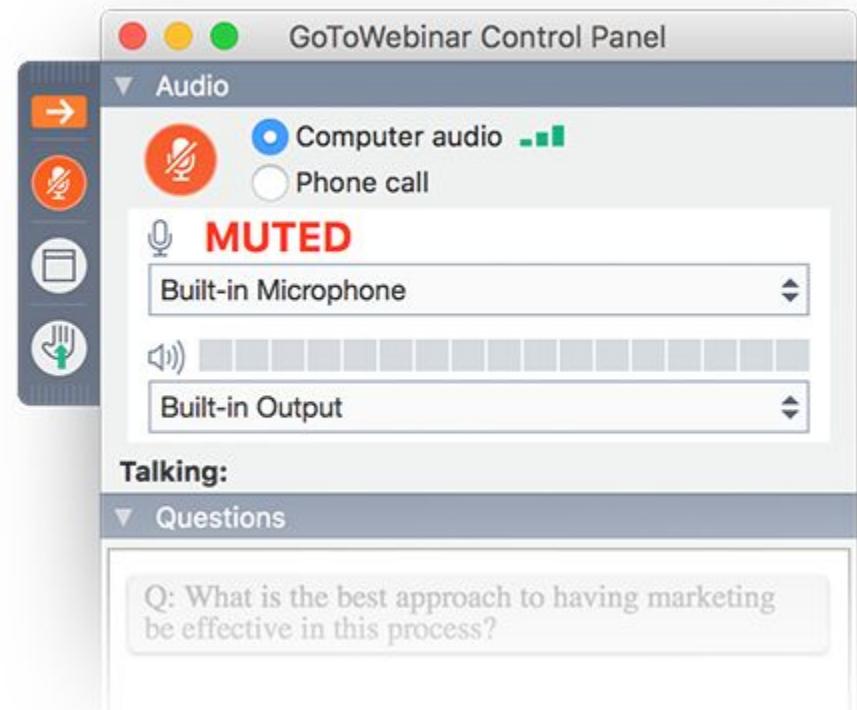


HAVE QUESTIONS? Not A Problem!

Locate the Questions
Panel.

You CAN type a question
in your control panel.

We will do our best to
answer it.



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If we teach it on this webinar series, it's been

Tried Tested

APPROVED

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AUDIENCE POLL

Poll Results



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What's Trending Now



THIS WEBINAR COVERS:

-  The Evolution of CRMs
-  Financial Benefits of CRMs
-  Real Estate CRMs Today
-  CRM Features
-  Using Your CRM

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The Evolution of CRMs



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What's Trending Now



WHAT'S TRENDING NOW

YOUR SALES PROCESS

TODAY...

Your CRM creates processes, records and automates almost every aspect of your sales process & client relationships.

Let's Walk Through It



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WHAT'S TRENDING NOW

YOUR SALES PROCESS

MARKETING CAMPAIGN

Email Drip Campaigns

Newsletters

Content Creation

Social Media Integration



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WHAT'S TRENDING NOW

YOUR SALES PROCESS

LEADS

Collects Leads from ALL Sources

Organizes & Categorizes Leads

Records Lead Communications In ONE PLACE



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WHAT'S TRENDING NOW

YOUR SALES PROCESS

HOT LEADS

Evaluates Lead Activity

Lead Scoring



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WHAT'S TRENDING NOW

YOUR SALES PROCESS

PROPOSAL

Proposal Delivery

Client Follow Up

Reporting on Sales Cycle,
Close Rate and Pipeline
Timeline

Proposal Activity Tracking



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WHAT'S TRENDING NOW

YOUR SALES PROCESS

NEW CLIENT

Automated Emails

Automated Texts & Video Texts

Providing Attentive Service



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WHAT'S TRENDING NOW

YOUR SALES PROCESS

DELIVERY

Automated Workflow

Automated Listing
Delivery

Interactions Tracking

Transaction Management

Notes & Tasks



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YOUR SALES PROCESS

RETENTION

- Home Closing Follow Up
- Requesting Testimonials
- Significant Dates
- Ask for Referrals
- Top of Mind Campaigns



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Financial Benefits of CRMs

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INCREASED REVENUE / DECREASED LOSS



Increased Leads



Increased Conversion



Increased Efficiency



Decreased Lost Time



Increased Client Retention

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Real Estate CRMs Today

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 **LionDesk**TM

 **realvolve**[®]

 **Follow Up Boss**[®]

 **Contactually**[®]

 **Wise Agent**[®]

 **IXACTCONTACT**[®]
FOR REAL ESTATE PROFESSIONALS

Top Producer[®]

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WHAT'S TRENDING NOW

	Starting At	Strength	Weakness
 LionDesk ™	\$25/month	Well Rounded	No letters / print
 realvolve ®	\$49/month	Workflow	Learning / setup required
 Follow Up Boss ®	\$149/month	Well Rounded	\$\$\$
 Contactually ®	\$59/month	Auto prompts to followup	\$\$
 Top Producer ®	\$80/month	Great tech support	User Interface Dated
 IXACTCONTACT ® FOR REAL ESTATE PROFESSIONALS	\$33/month	Ready to use marketing	Few integrations
 Wise Agent ®	\$29/month	Done for You Newsletter	No native mobile app

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EQUAL HOUSING
LENDER



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MOBILE ACCESS & USABILITY

- Push Notifications
- Automatic Text Messaging
- Business Card Scanning
- Geolocation
- Creates Tasks, Notes, Contacts
- Logs Interactions
- Ease of Use & Accessibility



Screen enhanced for visual purposes only. Carrier fees for data usage may apply.



FOR BEST IN MOBILE ACCESS & USABILITY...



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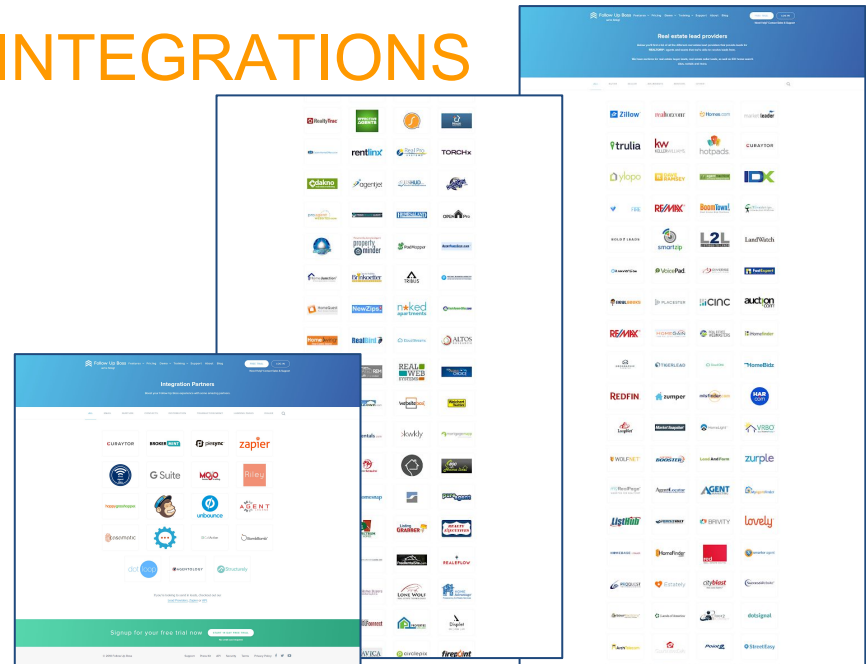


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THIRD PARTY INTEGRATIONS

- Direct Integrations
- Email Parsing Lead Option
- Open API
- Integration with Zapier



FOR BEST IN THIRD PARTY INTEGRATIONS...



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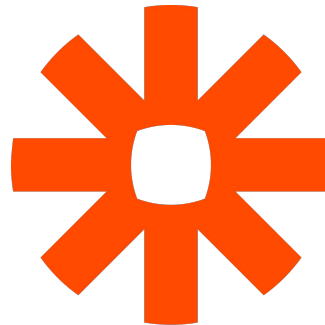
THIRD PARTY INTEGRATIONS

Plan A:

Direct Integrations (open API, email parsing, etc)

Plan Z:

Zapier (or another 3rd party integration program)



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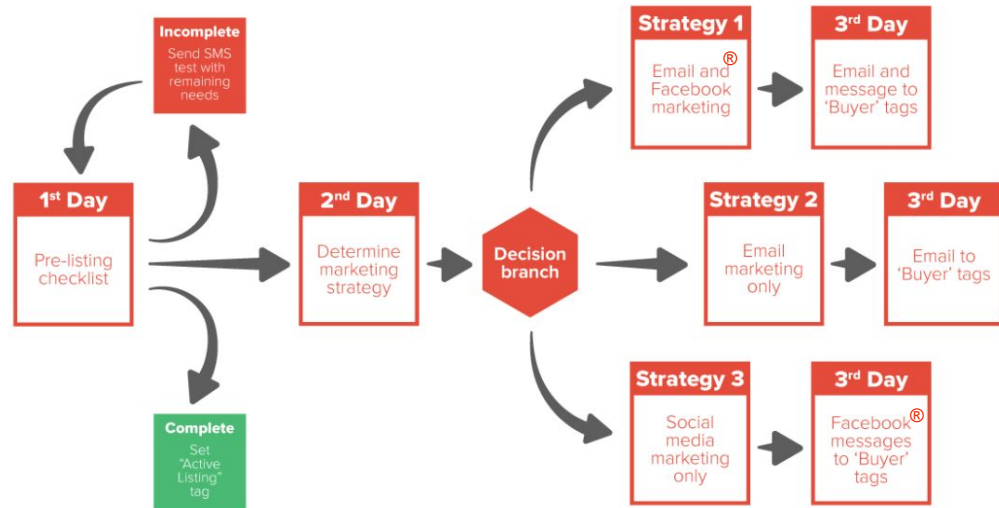
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AUTOMATIONS

Kick off follow-up campaigns based on source, etc.

Trigger tasks, emails, reminders based on actions.



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MARKETING CONTENT

Pre-written emails, letters and other marketing materials available for customization and immediate use.

The screenshot shows a web interface for managing marketing content. At the top, there are tabs for "Select Email Template", "Create New Email", "Monthly e-Newsletter", and "Campaign Reporting". Below the tabs, there is a "CATEGORY" dropdown menu set to "All" and a "KEYWORD SEARCH" input field with a magnifying glass icon. The main content is a table with the following columns: "Name", "Description", "Created By", "Last Updated", and "Category". Each row also has a trash icon on the right.

Name ↑	Description	Created By	Last Updated ↓	Category ↑
A coat of paint	2 Year Seller Prospecting Plan	IXACT Contact	06/19/2018	Activity Plans
A good REALTOR, like me.	2 Year Seller Prospecting Plan	IXACT Contact	06/19/2018	Activity Plans
A REALTOR's most important quality	4 Month High Touch Seller Prospecting Plan	IXACT Contact	06/19/2018	Activity Plans



FOR BEST IN PRE-MADE MARKETING CONTENT...



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CRM Features

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EQUAL HOUSING
LENDER

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CRM FEATURES: STANDARD

- Lead Activity Awareness
- Automated Tasks & Workflow
- Marketing Content
- All Data In One Place
- Marketing Automation
- Customer Portal
- Reporting
- Analytics
- Phone Integration
- Communications Automation
- Text Capability
- Email Support
- Knowledgebase/Training
- Activity Tracker
- Social Media Integration
- 3rd Party Integrations

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Using Your CRM: Best Practices

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BEFORE SELECTING A CRM:

Identify your pain points.

What is the biggest thing preventing you from growing? What takes up the most time in your day? Where are the bottlenecks in your business?



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BEFORE SELECTING A CRM:

Decide what features are most important to you.

Don't look at the standard features that come with every CRM. Look at the features that are unique and decide which one is going to be the biggest benefit to your business.



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What's Trending Now



BEFORE SELECTING A CRM:

Determine if it's scalable.



When looking at a CRM, don't choose the cheapest one available, at the expense of being able to grow.

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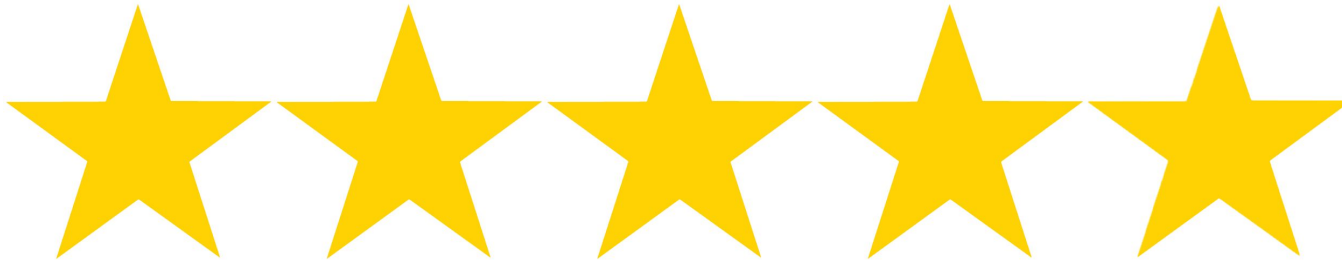


What's Trending Now



BEFORE SELECTING A CRM:

Read the Reviews!



Learn from others. Reviews are an incredibly valuable tool that will give you insight on what it's like to use that CRM or service.



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What's Trending Now



BEFORE SELECTING A CRM:



Look at their Training/Knowledgebase/Self-Help Services & Tools. At some point you are going to need to make changes, find information quickly, etc. How easy is it to use?



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What's Trending Now



BEFORE SELECTING A CRM:

Take it for a test drive

Demo the dashboard of the CRM. Get in there and look around. Is it easy to navigate? Rate the ease of use.



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What's Trending Now



BEFORE SELECTING A CRM:



Review their reporting capabilities.

Will their reports give you the information you need for important decisions regarding your sales process and marketing efforts?

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What's Trending Now



WHAT'S TRENDING NOW

CRM BEST PRACTICES - Nothing beats REAL LIFE USE

- 1) Complete the setup - but with only a small group of your contacts.
- 2) Integrate your other services.
- 3) Set up 1 or 2 marketing automation/ drip campaigns.
- 4) Spend 1 hour / day prospecting using the CRM (Locate a person with whom to follow up, take notes, add contacts, look up info, prioritize tasks, mark tasks complete).

GETTING STARTED



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CRM BEST PRACTICES - Once You've Settled on a CRM

- 1) Complete the setup process as designed.
- 2) Customize your settings.
- 3) Import all contacts from all sources.
- 4) Integrate your other services.
- 5) Set up marketing automation/ drip campaigns.
- 6) Set up workflow automation.
- 7) Automate your reporting.

**GETTING
STARTED**



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EQUAL HOUSING
LENDER

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CRM BEST PRACTICES

USING YOUR CRM - BEST PRACTICES

- 1) Every day, log in to check your tasks, agenda & goals.
- 2) Review prospects and spend 2-4 hours prospecting (add new leads, take notes, apply campaigns, make appointments).
- 3) Commit to a single system - never record info elsewhere (no writing down emails or tasks on paper and transferring later).

DAILY



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SO, ARE YOU READY TO IMPLEMENT THIS STRATEGY?



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**WHAT'S
TRENDING
NOW**

Each will teach ONE KEY strategy that:

- Drives Traffic
- Creates Conversion
- Retains Sphere
- Creates REAL Business

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