REMAX RESULTS

SYSTEMS EVERY REALTOR NEEDS TO USE (AND WHY)

CRM

What information should be in each client's profile:

Name
Phone Number
Email
Addresses of all Properties (home, investment, vacation)
Preferred Method of Communication
Source of Lead
Family Details - include kids, pets, etc
Employer/Occupation
Hobbies/Interests

Notes on their search needs

Task and/or Drip Campaign

Transaction History

Notes on events they've attended, gift drop offs, social media engagement or interests

The goal is to make your CRM more than just a database — it should be a relationship tracker. When you pull up a client's profile, you should immediately know who they are, what they need, and when/how to follow up.

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EMAILS

Dreaded Emails!

Use your inbox as a to-do list!

Folders for everything- once you're done with it, put it the folder for the transaction.

Are you an inbox zero person? If not you should be!

Use Folio to keep a file of the transaction docs once a transaction closes. Download the PDF!

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Calendar

Time Blocking - Non-negotiable but allow time for clients to book with you.

Color Code with Categories for Clarity - for example colors for each of these: appointments, prospecting, social media, personal, deadlines

Sync your calendars across your devices and with your scheduling service

Don’t forget to block in travel time!

Set reminders and always confirm! Send calendar invites to clients that don’t book with your calendar.

Block personal and family time.

Review weekly and monthly to see what worked and what didn’t. Did you complete all of the prospecting blocks?

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Task Management

Checklists for everything! Preferably in Asana or other digital system.

Checklists should include:
Listing Checklist
Under Contract Checklist
Rental Checklist (Listing and Tenant)
Closed Transaction Checklist

Daily Checklist of Activities to Accomplish (see next slide)

Automate, Automate, Automate!

Email Templates and Checklists will save you! Anytime you do something more than once - create a template or checklist!

Take Notes! Do you have an app for taking notes- even in your iphone - for each property when you're doing a walk-through. Or in FUB when you're talking to a client. Don't rely on your memory!

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Daily Activity Checklist

Morning Routine

- [ ] Check/Respond to Emails and Texts
- [ ] Review Calendar and Confirm Schedule
- [ ] Check MLS Updates

Professional Growth/Education

- [ ] Preview Properties/Tour Homes
- [ ] Review Local Market Stats/Trends
- [ ] Education and Skill Building

Lead Generation and Prospecting

- [ ] Make Prospecting Calls
- [ ] Follow up with leads in CRM
- [ ] Post on Social Media and Engage
- [ ] Do Tasks in CRM

Organization/Admin

- [ ] Update files
- [ ] Log Mileage and Expenses

Client Services and Active Business

- [ ] Check on Active Transactions
- [ ] Provide Proactive Updates to Buyers/Sellers
- [ ] Prepare for appts. (CMA, packets, iterneraries)
- [ ] Showings and Appointments

End of Day Routine

- [ ] Review Calendar and Tasks
- [ ] Plan Tomorrow’s Priorities

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Finances

Keep track of your pipeline with your funnel board.

Track your commissions with Brokermint.

Are you putting your commissions into different accounts: savings, retirement, taxes, needs, wants.

Track your expenses - can be as simple as a spreadsheet and scan receipts - all the way to Quickbooks or other software. Don't scramble at tax time.