



THE GUIDE TO  
**EFFECTIVELY  
USING A CRM**  
TO **SELL BETTER & FASTER**

**HOME**SMART®





# Introduction

When you first started selling real estate it's likely you didn't have systems set up or defined processes in place. In fact, you were probably — and maybe still are — using a spreadsheet to keep all your contacts organized and their information documented. But as your business starts to grow, you'll need to grow out of your spreadsheets too.

It's time for a customer relationship management system. A customer relationship management system (CRM) can help empower and organize your work while defining and streamlining your processes, giving you more time to dedicate to your business.

You might have preconceived negative connotations with a CRM thinking they can be too time consuming or that the excel sheet process you have works just as well. But through this eBook you'll learn how and why a CRM can actually improve your efficiency, enable you to land clients better and faster, and allow you to spend more time working on your business instead of in it.

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A photograph of three young adults, two men and one woman, smiling and looking upwards. The woman on the right is pointing her right index finger towards the top right corner. She is wearing a dark blue top and a black and white striped skirt, and holding a clipboard and a pen. The man on the left is wearing a light blue t-shirt. The woman in the middle is wearing a light blue button-down shirt over a white top and jeans. The background is a bright, slightly blurred indoor setting.

## **Chapter 1**

# Sell Better With Your CRM





# The right CRM system can give agents a competitive edge.

## **Real estate today is a far cry from what it was just 20 years ago.**

The advent of search and social media means selecting a real estate agent is now more about research and careful consideration for home buyers and sellers rather than agents knocking on doors and using the “spray and pray” technique.

But different doesn’t always mean better. Even though changing times necessitate new approaches, some agents merely transfer their old methods to modern channels.

It’s not totally their fault. Change is hard, and sometimes, scary. But not to fear — in this bold, new world of real estate, the right CRM system can not only enable agents to update their practices, but also give them a competitive edge.

### **Contextualize Outreach.**

When a real estate agent receives a referral or decides to target a specific area

or person, they don’t have to go into the initial outreach blind. Today, there’s a plethora of buyer information available. Before picking up the phone or writing a cold email, agents can research their leads on:

- **Search engines**
- **LinkedIn**
- **Facebook**
- **Twitter**

This research is great for your initial outreach but what happens when you need to follow up three months later and don’t remember all the information you previously looked up, or the conversations you had with the prospect?

CRM to the rescue. Within a CRM, agents can input all the collected data to give context on what the contact already knows about the agent, the home buying or selling process and any previous conversations. A CRM that integrates with a transaction management system also gives a comprehensive picture on the past transactions the agent and buyer/seller may have done together. The value





of this knowledge is hard to overestimate.

### **Make Sure Nothing Falls Through the Cracks.**

It's rare to get a prospect's attention on the very first outreach attempt. More often than not, an agent will need to reach out again and again. Persistence is a virtue. Abandoning prospects too soon could leave money on the table.

But how can an agent keep all their assorted prospects and outreach attempts straight? Depending on the number of leads an agent is working at any given time, trying to remember to call Lead X on Tuesday, Referral Y on Friday, Past Client Z on Monday, and sending check-up emails on Thursday, Wednesday, and Saturday is all but impossible.

Wouldn't it be nice if the CRM took this memory game off agents' plates? With the right system, this isn't just a pleasant dream — it's a reality. Many modern CRMs include task modules that automatically alert agents of who to follow up with and when. Simply set a reminder, and forget it.

When the time rolls around to reach out again, agents also benefit from having all prior contact attempts at their fingertips, as well as any interactions that have taken place in the interim. With the right context at hand, agents can tailor their follow-ups based on what the lead has done and what's already been said such as the time remaining on a lease, the need for a specific school district, etc.

As outreach becomes more and more personalized, agents become more likely to receive a response, not less.



A man with a beard and a woman are smiling and holding keys, suggesting a successful real estate transaction. Another man is visible in the background, also smiling. The scene is set in a modern, well-lit interior.

## **Chapter 2**

# Sell Faster With Your CRM





# CRM can facilitate a faster prospecting flow.

**The right CRM can empower agents to sell more, better.**

**But what if I told you CRMs can also help agents sell faster?**

I wouldn't blame you if you chuckled a bit. After all, "CRM" practically translates to "thing that slows me down" for most real estate agents.

However, modern CRMs can actually quicken the process of landing a client instead of bogging it down. Don't believe me? Read on to learn how CRM can shave time off agents' day-to-day, and facilitate a faster prospecting flow.

## **Eradicate Time-Consuming Data Entry.**

It's critical to streamline any task that isn't putting you face-to-face with a potential client.

We've already established that the right CRM system provides agents with

actionable insights, and benefits their business. However, CRM is only as good as the data entered into it. And if data entry is 100% manual? Good luck getting accurate information.

In this instance, CRM is the problem, but it can also be the solution. Some CRMs today lessen the data entry burden on agents by automatically populating contact information from the transaction management system. As you research and select your CRM, make sure you're choosing one that streamlines the process with automation.

## **Prevent Reinventing the Wheel.**

Content is king when it comes to your marketing efforts. Sending home sellers and buyers relevant content through channels such as social media fosters trust between agents and consumers and positions the agents as a trusted advisor who is knowledgeable about the potential client and industry.

Keeping in mind the amount of time agents waste looking for content, CRMs that double as content repositories can



help get the right content at the exact right moment. Just grab it from the CRM and go.

And content isn't just external-facing. What about the emails agents send day in and day out? While each and every single email should be customized to the specific recipient, smart agents save templates of their most successful mes-

sages for reuse down the line. Too bad this doesn't save much time when they have to dig through their outbox every time they'd like to repurpose a template.

Not to fear — CRM can help here as well. By allowing agents to save email templates directly in the system, they can access their time-saving messages without even having to open a new tab.





# Final Thought

**As you grow your business it's imperative you use a CRM to keep your contacts, tasks and content organized.**

The amount of potential clients that are lost from lack of follow up and personalization could transform your business! And it can all be done simply through CRM.

Don't wait to start until your list of clients is pages long — implement the

process now and watch as you are able to start spending your time more productively. Or, if your business is at an all time high and you don't have this process and system in place — don't wait! You'll only lose more time and more clients.

Implement a CRM and start to sell better and faster.





# About Us

**HomeSmart's CRM allows agents to efficiently run their business by keeping track of their clients and prospects while fully integrating with RealSmart Agent, HomeSmart's business productivity system.**

With centralized access to these business growth tools, marketing resources and transaction management, HomeSmart's technology helps agents accelerate their business while the 100% commission model allows them to keep more of the money they earn.

Founded in 2000 by entrepreneur Matt Widdows, HomeSmart is the number one

real estate brokerage firm in the Phoenix area and one of the fastest-growing in the nation. From tools and technology to training and brand recognition, HomeSmart is a full-service, career-oriented brokerage that allows you to conduct a thriving business the way you want. Headquartered in Scottsdale, Arizona, HomeSmart has more than 15,000 agents and over 130 offices nationwide.



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