

Got Database?

I think one of the single most asked question of new real estate agents should be what will you be using to track your business, most notably your contacts? Perhaps if you were to ask this question to yourself the answer might be like this... “Well, I don’t have time to enter all this stuff I have written all over these transaction folders into a database. I hardly have time to write the stuff down, let alone put it into a database.” Ah, the dreaded database...

I know it was a difficult question for me! I thought if I am going to win a “Client for Life”, how can I do this without the simple task of following up? I don’t want my clients to be orphans.

There is no quick answer to the solution, since everyone has their own methods and processes. So I have compiled this article outlining the process in which I have taken to determine what I found. This information was determined by evaluating several products. I took a serious look into designing an evaluation format to support the myriad of requirements that “we” as real estate agents require from a contact management tool. *Actually*, I feel that it is pretty much a consensus that Real Estate Agents require a lead generation, marketing, and reporting tool that happens to have contact management built in.

Once I had determined this, I realized that I should also pursue a system that will also include (but is not limited to) tracking expenses and finances, track listings and buyers, create flyers and/or include export tools to allow for integration for on-line mailing/marketing companies. Also, I believe it should provide for full transaction management, and perhaps provide the ability for web-based status reports to clients.

WOW!

The first part of determining the redesign of the evaluation format was determining what specific requirements I needed to include which most Agents would require in order to find a great piece of software.

After researching, I came up with the following:

- Software Requirements (Team Support, web based or desktop installation)
- Customer Contact Management
- Vendor Contact Management
- Listing profile transaction management
- Buyer Profile transaction Management
- Expense tracking
- Time & Task Management
- Lock box management
- Marketing Tools (Documents, Flyers, mail labels, settlement sheets, CMA, presentations)
- Marketing Campaign Manager, Client Follow-up Program & Scheduler
- Alerts, Reminders, & Notifications
- Sync & Data export and import tools
- Security Features and data backup
- Support offered (online, free phone support, etc.)
- Price

My application research uncovered numerous applications which contain several of the requirements outlined above. I have included a list below of some of the applications.

ACTive Agent	Agent Business Builder(tm)
AgentAchieve	* AgentOrganizer
AgentOutlook	AtoZ Business Builder
EmailUnlimited	eProspecting
eSYNC	EurekaWare
EZ Coordinator	Howard and Friends
Instant Impact Gold	Jade Tools
LeadCommander Professional Series	Mark-It Advantage Xi
MoveTrack	Powerbroker
PREP	Productivity Management
Propel for ACT Real Estate Software	Property Sales Advantage
QuickAssist	Real Estate Address Book and Letter Writer(tm)
Real Estate Real Easy	* Real Estate Success Tracker
RealtyCRM	REApplications Enterprise Brokerage Suite
Relocation Manager	REMS - Real Estate Contact Management System for Outlook
S.C.O.R.E.	Savvy Agent
Settlement Room	Silent Prospect
* Top Producer 7i	* Wise Agent

* Denotes applications that I evaluated.

** If you know of an application that I did not included in the list above, I apologize, as I did not intentionally leave any one application out. I just may not have been exposed to it yet.

The old adage goes... “Rome wasn’t built in a day” and the adoption process for an application can be intimidating, but we know that we have to start somewhere.

I have broken this down in a few ways:

- 1) Start out using a simple way to track your contacts, such as a spreadsheet application, or a simple text editor. Then pursue finding an application that supports all your needs. Once you do, you should be able to export the data into the new application.
- 2) Utilize a messaging application that has an address book built in. There are several available such as, Outlook, Outlook Express, Palm Desktop, etc. These applications also allow for the export of data in the event you move to another application in the future.
- 3) Find an application that has “all” the bells and whistles, and start utilizing it gradually until you adopt and adapt to all of the parts of the application.

I hope the information I have provided has been of some assistance to you. My intent was to assist in exposing what requirements are available out there. I can’t recommend any one specific application, since everyone’s situation is different, but if you want to win clients for life I can recommend that you use a system for follow up! Mega agents have confirmed this is the case.

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