REAL ESTATE

CRM Buyer's Checklist

Choosing the right real estate CRM for your business can be a challenge. There are many options available, and each one offers a different set of features.

How do you identify which CRM product will be the most effective at keeping you **organized** and helping you **stay in touch?** And what about **generating leads** and **converting them into clients?**

We've created this handy checklist to help you choose the real estate CRM and marketing automation system that **checks off all the right boxes.**

User Interface and Connectivity

- ☐ Quick to learn and easy to use
- ☐ An intuitive user interface that works on all screen sizes
- ☐ A customizable Dashboard that shows you how your business is doing
- ☐ A full Mobile App so you can work from anywhere on any device
- ☐ Automated sync with Google, MS Outlook, Apple apps, and mobile apps
- ☐ 100% Mac and iPad compatibility

Contact Management and Keep in Touch Fundamentals

- ☐ Keep in Touch Coach that tells you who you need to call each day
- ☐ The ability to communicate via text including mass texting and lead autoresponder
- ☐ Rich contact profiles and contact history
- ☐ Powerful contact grouping & search capabilities
- ☐ Email correspondence capture
- ☐ Social media integration
- ☐ Contact-specific keep in touch dashboard

- ☐ Automated Keep in Touch, Birthday, and Move-in Anniversary reminders
- ☐ A robust Calendar and Task List with automated reminders
- ☐ The ability to create and manage group marketing events
- ☐ Mail merged letters & envelopes or labels
- ☐ The ability to create and manage your Business Directory
- ☐ A full suite of helpful Reports

Lead Capture and Management

- ☐ Capture leads from your website and third-party lead sources automatically
- ☐ Leads receive instant text notifications
- ☐ Get immediate text and/or email alerts
- ☐ Auto-assign new leads to targeted drip email campaigns
- ☐ Auto assign new leads to monthly e-Newsletter distribution list
- ☐ View and manage your Business Pipeline from new leads to past clients
- ☐ Keep in Touch Coach so no lead falls through the cracks

Email Marketing

- ☐ Monthly Real Estate e-Newsletter
    - ☐ Professionally designed and written
    - ☐ Fully automated
    - ☐ Fully customizable (at agent and broker levels)
    - ☐ 100% responsive (i.e. looks great on mobile devices)
- ☐ Advanced Email Campaign Reporting
- ☐ Personalized graphical mass emails
- ☐ Targeted drip email nurture campaigns for different lead and contact types
- ☐ e-Cards for Just Listed/ Just Sold, holidays, birthdays, and move-in anniversaries
- ☐ Video email via Bomb Bomb integration

Active Business Management

- ☐ Buyer & Seller Management
  - ☐ Track all property and listing details
  - ☐ Automated email reminders of key dates and milestones
  - ☐ Manage offers
  - ☐ Track commissions

- ☐ Listing & Closing Activity Plans
- ☐ Related party information
- ☐ Showings module
- ☐ Unlimited document upload and storage
- ☐ Listing service reports

Teams Functionality

- ☐ Small teams can share one account for no additional cost\
- ☐ Powerful 'Teams' version available for larger teams

  - ☐ Each team member has their own calendar and task list which can be shared
  - ☐ Appointments and tasks can be assigned to other team members
  - ☐ Leads can be distributed to team members
  - ☐ Communications can be sent with either Team or individual branding
  - ☐ The team leader controls lead assignment, contact visibility, and permissions

Agent and Team Websites

- ☐ Easy to set up without needing a webmaster
- ☐ Customizable themes with extensive image library
- ☐ Responsive design for optimal display on all devices
- ☐ 16 pages of professionally written content
- ☐ Built-in Blog with professionally written blog posts provided
- ☐ Social media integration with Facebook and Twitter
- ☐ Powerful lead generation and lead capture capabilities
- ☐ Listings integration (IDX) – search engine optimized

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Customer Support

- ☐ Quick and easy set-up process with Setup Wizard
- ☐ One-on-one "concierge" service to help you get set up and running ASAP
- ☐ Free upload of your contact data
- ☐ Free set-up of your monthly e-Newsletter Personal email header
- ☐ Free assistance with setting up your website and IDX
- ☐ Free set-up of automated lead capture and nurturing
- ☐ Free set-up of Sync with Google, MS Outlook, Apple, or mobile apps
- ☐ Free set-up of Automated social media marketing
- ☐ Free unlimited phone support, plus Email & online chat

Looking for a CRM that meets your needs?

IXACT Contact gives you a world-class real estate CRM and Mobile App, powerful email marketing including a done-for-you monthly e-Newsletter, and your own agent website – all-in-one easy solution for just $46.75/month (annual plan).

IXACT Contact's integrated CRM solution makes it easy to:

- Organize and manage your contacts and your business
- Keep in touch and stay top of mind to generate more referrals
- Nurture and convert leads into clients
- Build your online presence
- Plan for success with goal setting and tracking

BONUS: IXACT Contact also offers **social media lead generation** with our **Social Stream™** add-on service. For just $20/month, Social Stream completely automates the process of finding and streaming exclusive high-quality content to your social media sites, resulting in **dramatic growth in followers, shares, and leads.**

Try IXACT Contact FREE for 14 Days

If you have questions about getting started with IXACT Contact, please call us at **1-866-665-0018,** email us at **info@ixactcontact.com,** or check us out online at **www.ixactcontact.com**

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