

*Real Estate*

# CRM Buyer's Checklist



**IXACTCONTACT**<sup>®</sup>  
FOR REAL ESTATE PROFESSIONALS



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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 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 system that checks off all the right boxes.

## Contact Management and Keep in Touch Fundamentals



A quick learning curve
A Mobile App so you can work anywhere on any device
Google Sync plus sync to Apple and/or MS Outlook
Rich contact profiles and contact history
Powerful contact grouping & search capabilities
Email correspondence capture
Social media Integration
A 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
A place 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
100% Mac and iPad compatibility



## 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, & move-in anniversaries

Video email via BombBomb integration



## Agent 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

Optional listings integration (IDX) – search engine optimized



## Automated Lead Capture

Capture leads from your website and third party lead sources automatically

Get immediate text and email alerts

Auto assign new leads to targeted drip email campaigns

Auto assign new leads to monthly e-Newsletter distribution list



## 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
- Leads, appointments and tasks can be assigned to other team members
- Communications can be sent with either Team or individual branding
- The team leader controls lead assignment, contact visibility, and team member capabilities

# Customer Support

	Dedicated “concierge” service to help you get set up and running ASAP
	Free upload of your contact data
	Free set-up of your graphical email header
	Free set-up of your automated monthly e-Newsletter
	Free assistance with setting up your website
	Free set-up of automated lead capture
	Free set-up of Google Sync or sync to Apple and/or MS Outlook
	Free unlimited phone support

**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 \$34.95 per month.

Our integrated CRM solution makes it easy to keep in touch and stay top of mind, nurture and convert leads into clients, stay organized and in control, and build a referrals based business.



**Try IXACT Contact FREE for 5 Weeks**

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