

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 and updated 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 BombBomb 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





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 and 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 and 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 \$38/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 5 Weeks

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**