

THE REAL ESTATE AGENCY AUTOMATION PLAYBOOK

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Introduction

As many aspects of the Real Estate sales journey become more complex than ever, many agencies are struggling with the question: ‘Who will do all this work?’ This implies that hiring more people is the only answer.

However, when the question becomes “how will this work be done?”, the answer lies with better processes and automation.

This playbook outlines how real estate agencies can use automation to make their businesses more efficient and productive while providing the experience today’s customers expect.

SweepBright empowers real estate agencies to do just that because it makes automating any business workflow a low-cost, high return low-tech process which generates a rapid return on investment.

Both simple and complex business workflow automations have already paid off handsomely for SweepBright’s customers, enabling them to meet the challenges of the rapidly evolving real estate industry.



PART

1

What is Automation?

Have you ever thought about how many of the everyday things you do (or, in fact, don't do) are automated?

From relying on your alarm clock to wake you up in the morning, to running the dishwasher before you go to bed at night, automation has become an intrinsic part of how we all manage our increasingly busy lives.

Today, businesses across every sector are automating processes to improve their productivity and efficiency.

For many real estate business owners though, contemplating automation makes them actually think for the first time about all the tedious, repetitive processes that take up so much time.

This industry is changing with the emergence of a new generation of mobile, tech-savvy customer expecting a better experience -- and a series of well-heeled disruptors offering improved customer service and lower or fixed commissions on the back of new technologies. The evidence is stacking up.

“Many organisations think automating business processes takes a lot of effort. But it's automating the small tasks that makes a big impact.”



Michiel Van Hove

VP Customer
Success
SweepBright

Automation and the Real Estate Transaction Industry

When it comes to the real estate industry the number of manual, repetitive tasks required to list properties, manage and update leads, respond to enquiries, manage appointments, send invoices, and take care of other everyday business requirements is seemingly endless. What's more telling, is that, in the past few years, this has increased exponentially with the explosion of communication & media channels.

As a result, there are opportunities for automation across all facets of an agency's business processes, including marketing, communication, task management, scheduling, document control, and lead nurturing -- leaving more time for your staff to focus on the most productive part of their jobs: generating sales.

CEO and Co-Founder of SweepBright Raphael Bochner says some companies in the real estate space have already grasped the impact that automating repetitive, manual tasks can have on their bottom line.

“The real estate industry is seeing a new generation of agents and brokerages hitting the market who use technologies not only to disrupt the real estate transaction space, but to disrupt the traditional ways of working,” Bochner says.

“They’re combining real estate agent expertise with efficient technology to create a smoother, less stressful, faster and more satisfactory customer experience. It also saves them time and money so they’re able to pass those savings onto their clients which makes them an attractive proposition,” he says.

In every mature market, disruptive, next-generation real estate agencies are looking to transform the process of buying and selling a home either by substantially lowering costs, by offering customers a better experience, or by combining both.

“The real estate industry is seeing a new generation of agents and brokerages hitting the market who use technologies not only to disrupt the real estate transaction space, but to disrupt the traditional ways of working,”



Raphael Bochner
Founder & CEO
SweepBright

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Raphael Bochner

Founder & CEO SweepBright

Benefits of Automation: The Agency Perspective

The benefits of automation are three-fold and apply equally to the customer, the real estate broker and the business itself, according to An Beenders, CEO of Limburg-based real estate group IMMO Beenders.

“Our job is very intensive, there are many different processes that have to be repeated time and time again, so we have been working to automate many of them in order to increase productivity, improve customer experience and grow sales,” Beenders says.

In the short-term, the agency is aiming to automate 90% of its business processes, but has started with many of the most practical ones.

“One of the most important processes we have recently automated is when an agent is in the field and he visits a new prospective listing with a vendor,” she says.

“As soon as the listing is entered in SweepBright’s app, folders and documents based on predetermined templates are automatically generated on our Google Drive, staff is alerted on our internal communication channel for which we use Slack and checklists are generated in Trello for our back-office staff

“All that happens before anyone from our team has even spoken to the agent,” Beenders says.

“Before we automated these processes, it took at least 50% more time to get the same amount of work done.

“Now that we can do this a lot faster, we can focus on selling properties faster and more smoothly, which benefits both us and our clients.”

Making use of simple applications such as Trello, Google Drive and Slack was the key to effective automation. But it’s the SweepBright app that enables to tie all those things together as a sort of Digital Backbone.

“We can now invest more time into prospecting for more business, so that we grow and become a bigger, more profitable agency.”



An Beenders
CEO,
IMMO Beenders

“Not only does it improve our customer experience for buyers and sellers, but our whole office is able to operate more productively and efficiently, which also means we’ve got a more highly motivated team,”

“It’s much easier to help our agents to generate seller leads and sell listings, than to teach them the hundreds of tasks they have to do when a new listing is signed,”

When it comes to vendors, in the past, Beenders says the agency manually compiled and sent a report once a month on the activities around their listing, but now each contact or inquiry is automatically shared with each vendor as it occurs.

Beenders says another opportunity is the fact that many vendors don’t understand millennials as well as IMMO Beenders does. “That makes us a perfect link between them,” she says.

“An increasing number of buyers today are millennials. They prefer to chat online as opposed to using the phone. So through SweepBright we have automated that they can chat with us, and that interaction is also automatically logged”

Progress has also been made in the agency's rental business, where automations have saved the agency time and made it more responsive.

For example, when someone inquires about a certain property they are asked to fill out an online application form. An automated message then informs them that their form has been submitted and they'll be contacted soon

"Before we automated this, we would sometimes receive two or three phone calls from applicants about a particular property.

"The focus now and over the past months has been for us first to automate all these processes to be able to grow in the near future," Beenders says. "I think we are a future-proof agency. There is only one way for us, and that is up."

“Before we automated these processes, it took more than 50% more time to get a property published online.”



An Beenders
CEO,
IMMO Beenders



PART

2

Ways to Boost Real Estate Agency Efficiency with Automation

It's very common to think of automation in terms of marketing automation alone, but there are much bigger gains to be had in the real estate sector by automating elements of the entire customer journey, covering business operations as well as sales and marketing.

Automation can be applied to leads and listings and how they interact with the processes that take place along the sales journey: from marketing and capturing an initial lead to the final sale, and almost everything in between, including inventory management, task management, team support and CRM.

Case study: WeInvest

How two real estate novices used technology to shake up the Belgian market

When Jonathan Pham and Gabrielle Amandt setup a new real estate firm called We Invest in a small office in Brussels in 2014, they were its only employees.

Today, less than five years later, the group employs 55 staff and operates in 10 locations across Belgium. Last year alone, the company almost doubled its number of agents to more than 40, its revenue exploded and its brand is recognised all over Belgium.

Pham and Amandt aren't afraid to admit that they didn't have a lot of experience as agents at the time. But what they did see, and understand, was that a new generation of customers were starting to shape the housing market

Their idea: to set up an agency that utilised new technologies and social media to offer a superior customer experience offering tailored to the new tech-savvy millennial.

By leveraging technology and social media, We Invest has become another example of the rise of the next-generation agency that uses modern tools such as SweepBright to boost their business.

4 Facts About We Invest

On average, an agent sells a property in just **5** weeks

Sold **22** **ONE WEEK** properties in 2017

Adds **30** listings a month to its inventory

Customer satisfaction is spectacularly higher than your typical real estate agency, with **90%** of clients strongly recommending We Invest

As We Invest grew, Pham says the available software on the market didn't meet their needs for reducing inefficiencies in the sales journey so that their agents could focus on what they were good at.

"Before we invested in SweepBright, creating a new listing was a tedious task that took a couple of hours or even days, and it had to be done behind a desktop," he says.

Sharing it on social media, one of the key channels We Invest excels in today, was not automated, and adding feedback for visits, phone calls and messages was a manual, unsophisticated process that often lead to information loss.

Now SweepBright enables We Invest to dramatically reduce data input time.

It also provides agents with a way to stay on the move by providing access to listings data, publishing or matching new listings, and directly communicating with their leads, without the need to go back to the office.

We Invest agent Olivier Connan says he is still amazed at the way other agencies work compared with how We Invest operates.

The Results Speak for Themselves

Productivity:

The processing of publishing a new listing has been halved from an average of 6 hours per listing to 3 hours. With almost 10 new listings per week, this means agents are able to free up a lot of time to focus on their customers.

Cost-savings:

Using SweepBright We Invest can automate dozens of processes that would have taken one or more full-time jobs to do manually. In today's context, 44% of companies using automation see a return on investment in less than three months.

Revenue:

We invest improved their lead follow-up by using SweepBright's interaction tracking, and saw a massive boost in revenue in 2018.

“Together with the mobile aspect of SweepBright’s platform, I can make two to three times more visits per week than ever before – which means I can close more deals.”

Elliott Cuvelier from We Invest says one of the unique advantages of SweepBright is its ease with which processes can be automated.

“You don’t need an IT background to combine other apps or tools with SweepBright. It’s extremely easy to create automated workflows by pairing SweepBright with some great apps.

“For example, when a property status change is made by any of our agents -- sold or rented -- there’s a chain of automated actions being initiated, such as generating an invoice or sending a text message to thank our contact.

“This automation is something that would have cost us a lot of time and money to set up with any other platform because it would need to be custom developed for our needs.

“This is one of my favourite aspects of SweepBright: it’s a completely open platform which is easy to link with thousands of other apps out there. If there’s something new that I’d like to try out tomorrow, there’s no need to invest in integration costs.”

How to Automate with SweepBright

SweepBright works as an agency's technological backbone to create a digital workspace that is unique to every agency.

What SweepBright does is seamlessly work with all the modern tools and applications out there that agents are now using for things like scheduling, nurturing leads, video mail, tasks and online chat. We help them to drive efficiencies through automation, and reach out to more prospects easily and effectively on the channels their prospects prefer.

SweepBright works by integrating with apps and tools directly and easily.

SweepBright is part of the Zapier platform where thousands of apps can be interconnected easily to create automated workflows (called 'Zaps'). You can add a new SweepBright lead automatically to your MailChimp mailing list, or post to Facebook each time a listing is set to 'Sold'.

The sky's really the limit. And to make it easier, SweepBright has created templated 'Zaps' that agents can begin using instantly.

Increase your customer facing time by more than 50%

Discover some
automations along
your agency's
journey





Create awareness

Awareness for your agency's brand and expertise is key in attracting potential vendors. Automating some of those efforts will help you stay top of mind when people are looking to sell or let.

AUTOMATION

- ✓ [Post successfully sold listings on social media automatically](#)
- ✓ [Print & send flyers in your area with latest closed deals](#)

AUTOMATION

Visit property

You got that property visit with a prospective vendor. Besides the usual appraisal and presentation, «nurturing» that contact before and after your visit with personalised content can help you close that contract.

AUTOMATION

- ✓ [Send a presentation video to prospect vendor](#)
- ✓ [Add vendor automatically to nurturing campaign](#)

AUTOMATION

Close contract

You just closed the contract! There's no reason to loose any time to bring this listing to the market. Inform your team, create tasks and todo's, book a photographer, there's plenty of logistics involved....and with SweepBright you can automate most of it.

AUTOMATION

- ✓ [Generate your contract and sign it digitally](#)
- ✓ [Automatically inform your team of a new listing](#)

AUTOMATION

Advertise listing

The listing is visible on multiple advertising channels generating leads and information requests? Don't let anyone skip your agency's attention. Remember that great customer experience drives sales. You can have a bunch of automations run the job for you.

AUTOMATION

- ✓ [Capture leads from social media campaigns automatically](#)
- ✓ [Send personalised welcome mails to new buyer leads](#)

AUTOMATION





Get viewings

Getting viewings and making sure you get the most of those is key in running an efficient agency. Avoid no-shows and offer your visitors a far superior pre- and post-visit customer experience!

AUTOMATION

AUTOMATION

- ✓ [Add visitors to a nurturing campaign](#)
- ✓ [Send personalised thank you sms's to your visitor a few hours after his visit](#)

Negotiate offer

You have one or more bids? After some negotiation it is time to move on to the closing but you might need to complete a number of tasks and gather some additional documents. Don't let time go by and make sure the process runs smoothly with some easy automations.

AUTOMATION

- ✓ [Create tasks and assign them to your team members](#)
- ✓ [Send an automated e-mail to the bidder with follow-up instructions](#)

AUTOMATION

Close deal

You closed that deal! Congratulations are in order and mostly, make sure to leverage that moment to get new listings, increase your visibility and stimulate your team.


AUTOMATION

AUTOMATION

- ✓ [Thank the vendor with a personalised postcard a few weeks after closing](#)
- ✓ [Send a personalised e-mail to the buyer asking for referrals](#)



5 Ways to Save Time and Deliver a Better Customer Experience with SweepBright



1

Automation in Action #1: Sending Personalised Alerts and Reminders with SweepBright + ClickSend

For a real estate agent, following up effectively is an essential part of providing a great customer experience. It can also be the difference between making a sale and missing a sale -- particularly as SweepBright's research shows most people decide in the six hours after visiting an open house whether they would like to buy that property.

Sending personalised communications to each lead can be time-consuming -- but automating these tasks can reduce the effort it takes to send each communication to a single click.

Using SweepBright together with ClickSend, a cloud-based service that lets you send and receive SMS, emails, voicemails, faxes and letters worldwide, essential communication tasks can easily be automated, including:

- Text messages about open house times and locations
- Auction alerts
- Follow-ups after a house visit
- Immediate responses to new leads
- Promotional material for new listings/rentals
- Rent reminders
- Notifications to vendors
- Calendar events
- Property development updates.

Hi Arie!

Thank you so much for the visit earlier today. Give it some time to reflect on. Please come back to me if you have got any questions. You can reach me on [0486172366](tel:0486172366) or via mail on ygal@sweepbright.com

The app also takes advantage of email to SMS which lets you reply once from an email to a list of prospects via SMS, and SMS keywords which lets the user send a keyword, for example 'Brochure', and receive an automated response, in this case a brochure.

Just automating one or two of these tasks can save lots of time, says Ygal Levy, Key Account Manager at SweepBright.

“Manually sending SMS messages to new leads is time-consuming and can be tricky to time,” Levy says. “With this integration, new SweepBright leads will get ClickSend SMS messages automatically, while you spend your time on more important tasks.

“Or if you want to send your vendors an SMS message that their property has been sold or rented, this automation can help as well. Once activated, you’ll automatically inform a vendor via a ClickSend SMS when their property was sold or rented on SweepBright.”



2 Automation in Action #2: Instantly Update your Team with SweepBright + Slack

Slack is one of the world's leading messaging apps; great for team communication, having all your communications in one place, instantly searchable and available wherever you go.

Many real estate agencies use messaging apps such as Slack to speed up communications, improve collaboration between team members, and ensure all agency staff are operating efficiently and always acting on the most up-to-date information.

Michiel signed a new mandate:
Vendor: Lisa Harroy
Address: Meir 15 (Antwerpen)
(227 kB) ▾



Among the benefits of automating Slack with SweepBright are:

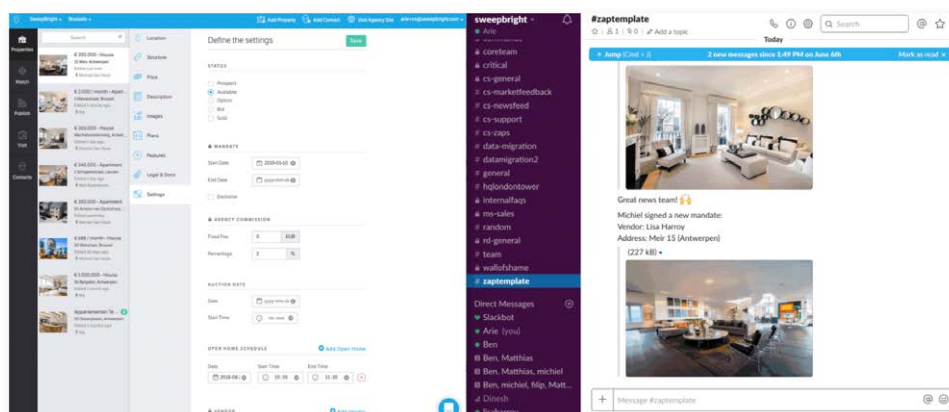
- Instant messaging
- Document-sharing
- Knowledge-sharing
- Knowledge search
- Task reminders.

For example, you can automatically inform your team when the status of a property changes in SweepBright.

When you add feedback to a lead or register an interaction in SweepBright, you can create a Slack reminder automatically.

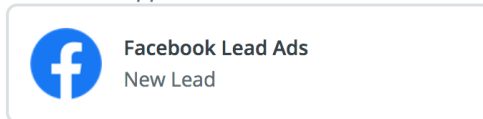
That way, your team stays informed about your lead interactions and knows when a lead has requested more information or shown interest in a property.

Here's how to tell your team when a property is sold by setting up an automation using Slack, SweepBright and Zapier using this simple 5-step process.

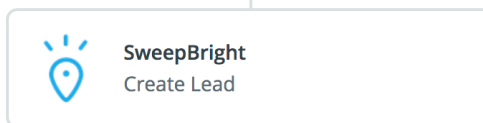


3 Automation in Action #3: Capture Leads from Social Ads with SweepBright + Facebook Lead Ads

When this happens...



do these tasks!



Younger, millennial home buyers spend a lot of time on social channels, which means real estate agencies must advertise properties on social networks such as Facebook if they want to reach that audience.

Facebook Lead Ads are also a great place for lead capture -- and SweepBright enables real estate agencies to automate this process.

When a prospect sees an ad for a property on Facebook and they register their interest, their information can automatically be entered as a new lead in SweepBright's database.

The benefits of automating lead capture from Facebook Lead Ads include:

- Easy lead information collection
- Accurate data pre-populated by Facebook
- Mobile-friendly data capture
- Actionable leads are added automatically to your database
- Speed of data capture enables rapid follow-up.

Your new leads are no good to you in your mailbox, waiting for you to export them. With a Facebook Lead Ads-SweepBright integration you can automatically create a new lead in SweepBright whenever a new user submits a response to your Facebook Lead Ads.

When a prospect sees an ad for a property they like in their Facebook feed, they simply click on the 'Learn more' button to fill out details such as name, email and phone number. They may also visit the agency's website.

When they hit 'Submit', their personal information is automatically entered into SweepBright, along with the property in which they expressed interest, and the lead is identified as coming from a Facebook Lead Ad.

Sign up to use SweepBright and middleware provider Zapier for free and use them with Facebook Lead Ads to automate the process of capturing a lead's information in SweepBright by following this simple guide.



4 Automation in Action #4: Promote Your Success on Social with SweepBright + Facebook Pages

The faster you can communicate with your customers on their preferred channel, the better for attracting new leads and selling more properties -- particularly when it comes to millennials.

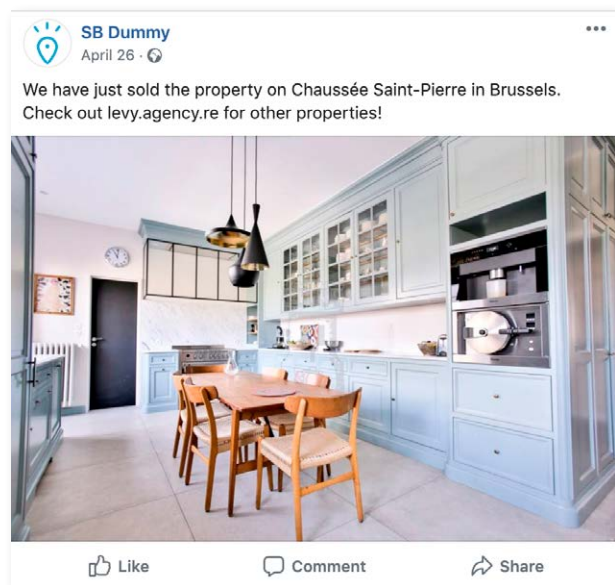
Most real estate agencies these days have a Facebook business page, which enables them to connect with customers, fans and followers on what is the world's largest social network.

You can create as many as 48 different automations between Facebook and SweepBright, making it easy and instantaneous to:

- Create posts for new property listings
- Post photographs and videos
- Promote property status changes, such as when a property has been sold or leased.

Communicating a successful sale in a timely fashion on a channel such as Facebook is great marketing for a real estate agency and for the individual agent involved.

So it's important for agents to update their agency's Facebook business page quickly when a property is sold.



5 Automation in Action #5: Efficient New Listing Task Management with SweepBright + Trello

Successful real estate agencies find ways to manage the different functions and tasks that need to occur throughout a transaction, thereby using the time of team members effectively.

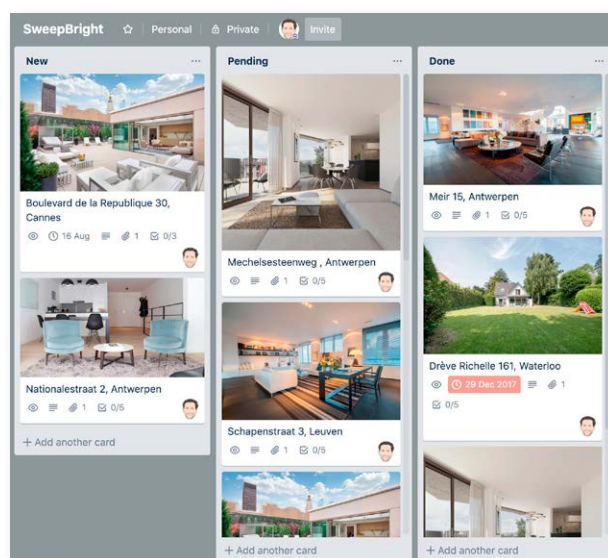
Many agencies use Trello, a simple project management app, to allocate tasks to particular team members, to pass work between staff and to ensure repetitive tasks are completed.

Trello's boards, lists, and cards enable you to organize and prioritize your projects in a fun, flexible and rewarding way.

Automating interactions between SweepBright and Trello enables agencies to customise Trello for the specific tasks in your agency's unique workflow. This creates visibility and transparency around the progress of tasks and can speed up your business processes by:

- Creating boards, task management cards, and lists of work to be completed in Trello relating to a particular property transaction
- Recording comments on specific cards
- Creating and updating leads in SweepBright
- Communicating when tasks have been actioned, such as sending out contracts.

Sign up to use SweepBright, Trello and middleware provider Zapier for free and automate the creation of a task management card in Trello to kick-start a new listing transaction process when a property becomes available.



Conclusion

Automation is no longer optional: it's a must-have for any real estate agency that wants to meet or exceed the expectations of the new generation of mobile, tech-savvy customers.

The proliferation of digital channels that these customers use means exponentially more work for real estate agents.

But automation should go much further than simply making it easier to market a property.

The gains that agencies can make from automating their business processes can free agents up to spend more time doing the real work of helping customers to buy and sell property.

Each agency's process is unique and there is no one-size-fits-all technology solution that will meet every agency's needs.

But by using an adaptable, mobile-first productivity platform -- such as SweepBright -- that automates low value added parts of the sales journey, real estate agencies lower the cost and obstacles relating to automation and open the door to big productivity gains.

That means giving your agency its best chance of winning and growing in a rapidly changing real estate sector.

