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Real Estate CRM Automation Strategies for Growth-Driven Businesses

Introduction

Real estate agents never have enough time — they’re always on-the-go and expected to be available every minute of every day. Luckily, technology is here to help. With the right CRM software, you can turn time-consuming and repetitive real estate tasks into automatic listing management and communication with sellers, landlords and investors.

However, the true power of a great CRM lies in its ability to sync with a real estate agency's operations and processes, to deliver effective digital marketing at every touchpoint of the property cycle. To ensure long-term business growth, we need to nurture our contacts so that we are remembered after the initial transaction, and CRM automation is crucial for an agency to make the most of their existing database.

To help you harness the strategic power of a real estate CRM, we've broken this guide down into 5 chapters:

Automation Strategies

Chapter 1:

Prospecting for Vendors

1. CRM-Form Integration

By connecting your landing page, website or pop-up forms to a real estate CRM, automation does the seller-generating legwork for you. These forms don't need to be complicated either: 'contact me' or callback forms are a simple way to increase enrolment and grow your database.

2. Progressive Profiling

If your website landing page form questions are irrelevant to the reader, they're more likely to bounce from the website. Progressive profiling uses browsing history and property interests to populate a form that's related to a property investor's interests, such as market updates or how to get a home ready for listing.

With the up-to-date information that progressive profiling offers agents, it will be that much easier to attract and convert potential sellers and investors in the future.

3. Lead-Generating Content

With 44% of property vendors looking to transact online, it's crucial for real estate agents and marketers to deliver digital content that's relevant to where prospective clients are in the property cycle. Content pieces such as top sales case studies and property market reports are great ways to provide value to them. Content-wise, investors will be looking for information on high-performing areas and up-and-coming locations, while sellers will be after ways to add value to their existing property. For example, website landing pages that offer eBooks on successful selling strategies and increased rental returns are effective ways to nudge investors down the property sales funnel.

By using segmented lists and automated communication, agents can deploy relevant content that resonates and engages, making it more likely for sellers and investors to choose the respective agent when it's time to pull the property trigger.

4. Seller-Targeted Paid Media

Sellers are worth the paid media spend because they are in a highly receptive mindset in comparison to other people in other stages of the property lifecycle.

It works like this: Targeted paid media across digital channels like Facebook, LinkedIn and property websites can funnel sellers to website landing pages with sign-up forms. Once filled, prospective sellers can then be routed and segmented based on location. With remarketing from your CRM lists, property owners can be turned into sellers and lost landlords can be marketed to. Additionally, agents can also deploy area-specific paid media using parameters that target, for example, the highest sellers in Dutton Park, Brisbane. This helps agents generate high-value investors and sellers in areas they are most interested in.

Chapter 2:

Closing Deals

1. Contact segmentation

After a prospective client has filled out a form with their details, a CRM automatically segments them into a dynamic list using the information supplied (such as location and property intent). As investors continue along the property life cycle, becoming vendors or landlords, the progressive CRM automatically shifts them into the relevant groups. This is a great example of how a CRM empowers agents and marketers with up-to-date information to deliver relevant messaging, such as information on the right time to sell or hot investment opportunities.

2. Dynamic content

Using determinants such as location, search history and past purchases, dynamic content is uniquely tailored to each individual who visits your website. By delivering personalised messages and push notifications that investors are interested in, an agent increases the chance of seller conversions in the future.

For example, a seller that's looking for the next step in their property journey can be alerted to upward trends in the buyer's market, so they're aware that it's a good time to get their property ready for listing.

3. Making The Most of 'Lost' Opportunities

What happens when an interested investor suddenly decides it isn't the right time to sell their property? No problem. A CRM can help agents mitigate "lost" opportunities like these by sending out delayed, automated messaging to check-in and see if they have any further questions or concerns with going to market. The same goes for lost investors — instead of having them return to a property website rife with competition, agents can request them to sign up for agency-specific property notifications.

For example, you could create an automated email that encourages lost sellers to subscribe to your recent sales email campaign, which sends them a monthly email with current market conditions and local property sales.

4. Seller-Targeted Paid Media

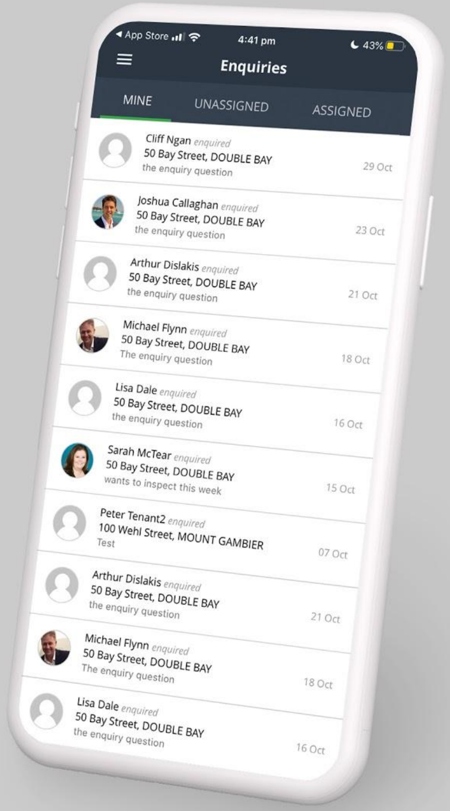
List remarketing is a powerful tool that enables remarketing by uploading your contact lists to paid media channels such as Facebook. This is useful for when you want to remarket to specific seller list segments that already have contact details.

For example, if a location has recently seen a surge in buyer interest, it's often a good idea to upload a list of investors who have previously enquired about selling a property in the same area, and to remarket to those contacts.

5. Pre- and Post-Open House Messaging

Struggling to get your open house attendance where it needs to be? CRM automation can deploy date-and-time reminders, as well as messages to reschedule should a person be unable to attend the open house. What's more, automated follow-up emails can be fired off minutes after a potential investor has attended the open house to quickly gauge their opinion of the property.

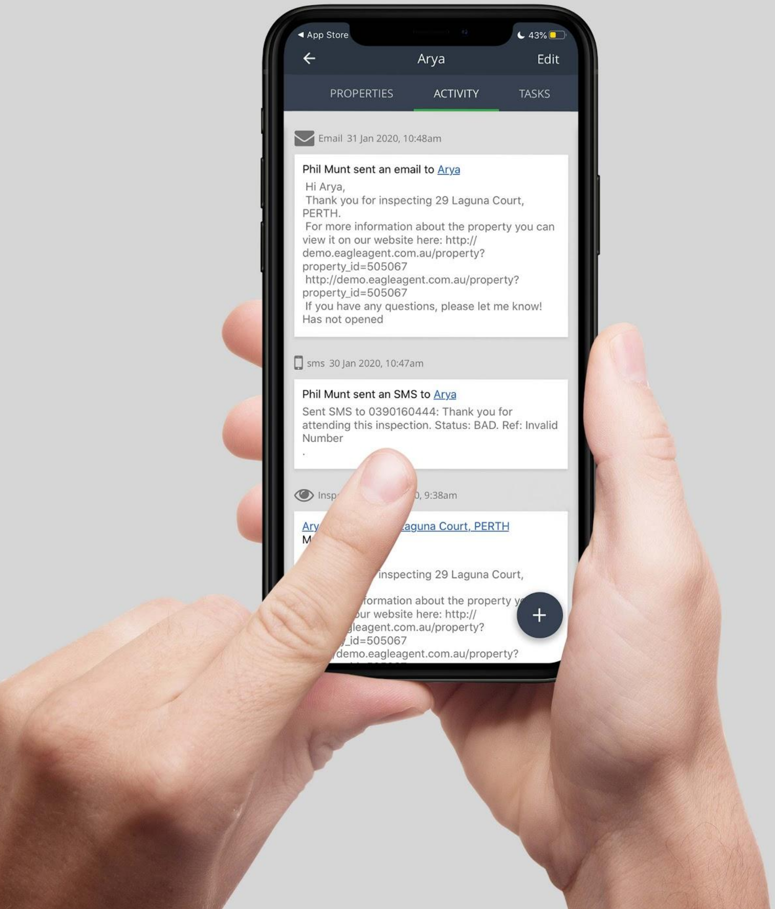
Pro-tip: An open house is also the perfect opportunity to capture new leads via a mobile app, to identify investors who could be likely prospects for a property management department.



6. Lead Nurturing With Email Drip Campaigns

A real estate agent’s lifeblood is their contact database. But this information means little if prospective clients aren’t being nudged down the property sales funnel. Nurturing prospects with CRM workflows ensures that your communications are being sent to the relevant people automatically, delivering messages that speak to their current sales state and property intent. Creating an email sequence (to be sent out over a predefined period of time) is an effective way of retaining and engaging property owners until they’re ready to sell.

For example, if an investor’s interested in selling in the next 6-to-12 months, you can automate a series of emails to provide them with helpful information, such as “Property Presentation Tips”, “How To Choose An Agent?” or “How Much Does It Cost To Sell?”.



7. SMS Communications And Campaigns

Not getting the response or results from your email marketing? Some people just prefer to keep in touch over mobile. SMSs are effective ways to keep in touch and remind your contacts about inspections, appointments or market updates. Moreover, including links to relevant property details or content offers can increase engagement exponentially.

8. Property Notifications

Has a property of interest in a similar price bracket or location just become available? Relevant alerts can be sent off automatically, using CRM data and a person's search history on real estate portals. By notifying investors as soon as they become available, you not only delight them with timely, relevant market updates, but an agent also builds rapport and elevates their chances of being selected to help them sell or invest.

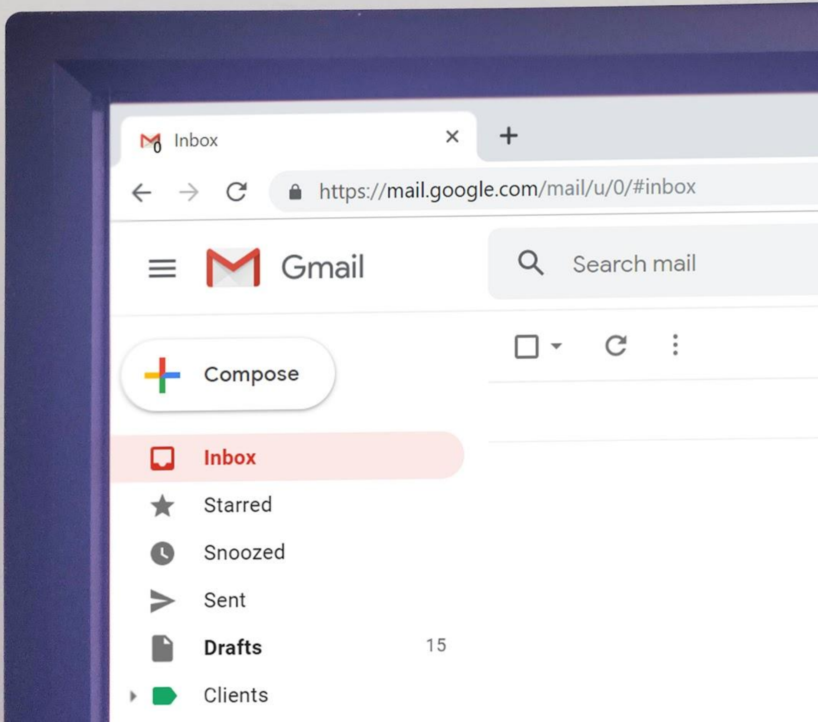
Chapter 3:

Delighting Sellers and Landlords

1. Personalised Newsletters

The content an investor will respond to depends on where they are in the real estate property cycle. A person that's shown signs of being ready to sell, for instance, will be looking for content that helps them get their property ready for listing, or advice on what to look for in a real estate agent. With personalised, automated newsletters, agents can educate and nurture prospects until they decide it's time to take action.

Subject lines like "5 tips to get a higher return on your investment" or "How to maximise your sale price when selling" are good hooks for owners who are thinking of changing property managers or selling.



2. Reviews And Referrals

Happy customers are great resources for positive reviews and referrals. After a sale has gone through, automated requests can be sent to ask the pleased property client to leave a positive review or refer a peer to your agency.

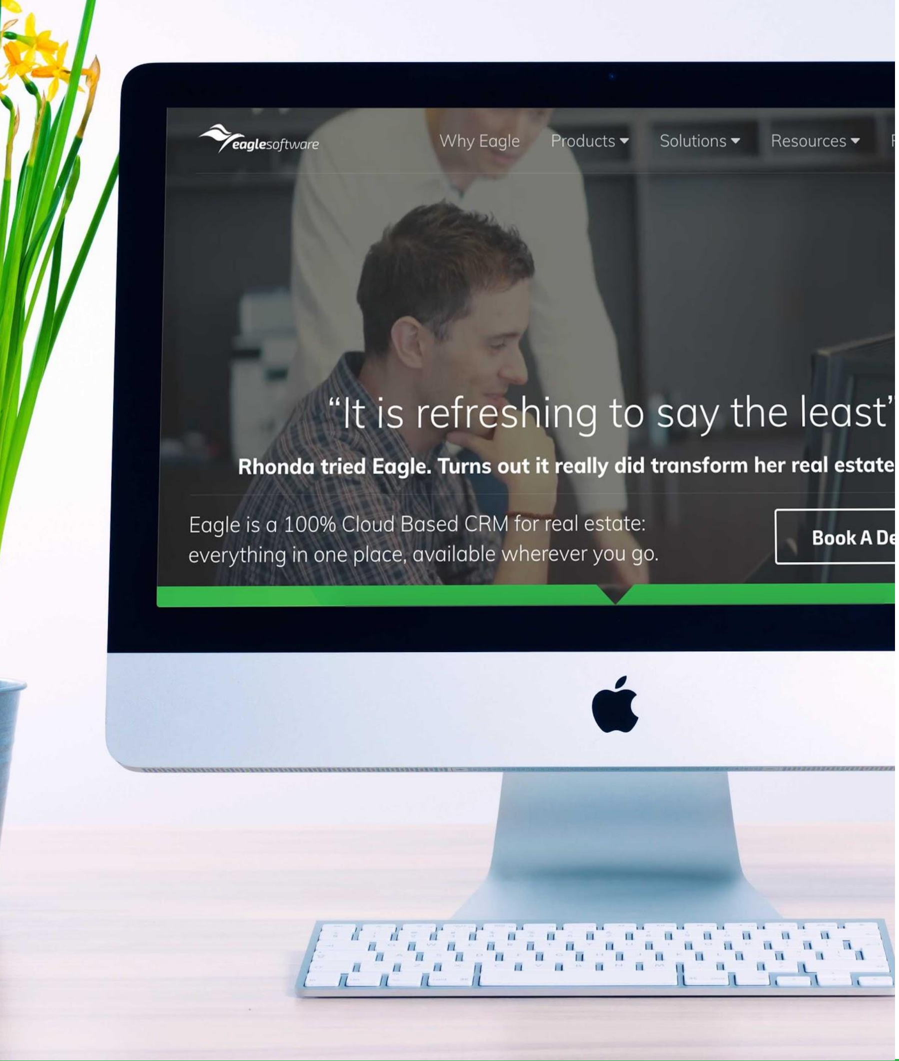
3. Post-Sale Delight

As any real estate agent worth their salt knows, the first sale is not the end of the cycle. In fact, it can be the beginning of a long nurturing journey that sees a seller becoming an investor or landlord. By staying in contact, an agent increases the chances of sellers using them when it's time for the next property investment step.

An effective way to remain top-of-mind with contacts is to surprise and delight them with post-transaction messages such as birthday wishes or celebrating the anniversary of a successful property sale.

Chapter 4:

Agency Efficiency

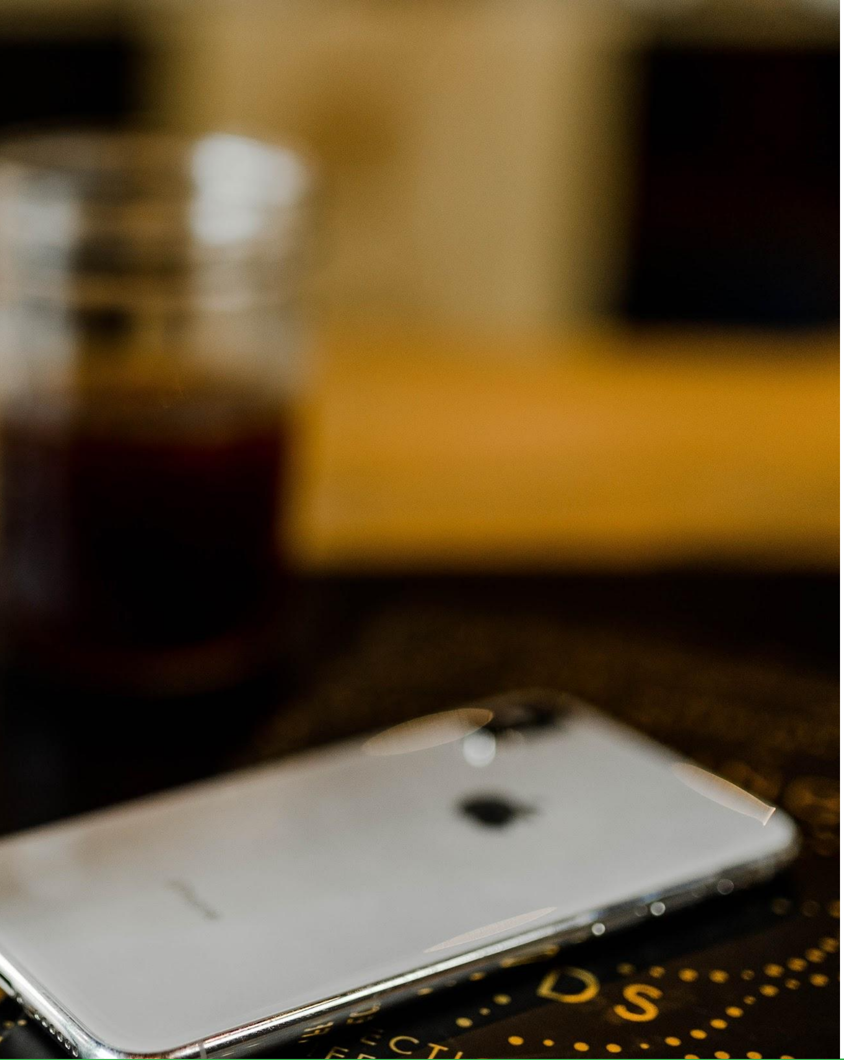


1. Portal Pushing

There are many reputable real estate websites online. And not so long ago, it was up to intrepid agents to manually upload their listings to each site, one by one. Thankfully, portal pushing automation has arrived to alleviate the repetition. Portal pushing allows agents to enter their listings once into the CRM and then synchronise them across all of their real estate portals, freeing up valuable time for the tasks that matter.

2. Lead Scoring Automation

Investor scoring in a CRM allows you to assign points to certain user actions, such as requesting a market appraisal. As each action is triggered, more points are accumulated. And with this information, an agent knows when it’s time to contact a hot seller or landlord to secure a possible listing or management.



3. Activity-Triggered Emails

Follow-up emails are low effort strategies that can pay huge dividends. When a person performs an action, such as downloading a Market Report from your website or requesting more information, follow-up emails can be set to fire off without the agent having to lift a finger. Even a simple “thank you for downloading” or “offer of assistance” email can go a long way towards keeping an agent top-of-mind.

4. Social Media Integration

Integrating social media platforms with your CRM enables effortless cross-channel publishing of property listings and agency collateral. Additionally, social ads that offer brochures, eBooks, area reports or property news are effective ways of generating future clients to export into your CRM for nurturing.

5. Sync Agents' Mobiles With Your CRM

Repetitive tasks can easily be the decider between a sale and a lost opportunity. Often, agents are too bogged down by administration to follow-up effectively and nurture their client database. By syncing your agents' mobile devices to a CRM, you'll go a long way towards removing the administrative bottleneck that hampers them from chasing new investors and discovering new properties. By syncing with an app, agents are able to:

5. Sync Agents' Mobiles With Your CRM

- Access client and property data whilst working remotely
- Data capture at the touch of a button via the app
- Trigger automations to begin communication workflows. For example, 'thank you for inspecting' emails.
- Work remotely and not be tied down to the office

Chapter 5: EagleCRM

Delivering All Of The Above And More

Are you looking for a real estate CRM backed by a team of specialists who are dedicated to transforming and growing your business?

Eagle Software's EagleCRM is an easy-to-use real estate listing and contact management software package that puts the power of automation in your hands. With EagleCRM you're able to manage your properties from 'prospect' to 'settled', as well as keep track of investors throughout the property cycle (and beyond).

EagleCRM Offers:

- **Appraisals management:** Nurture disinterested investors, nudge prospects further down the sales pipeline, and act fast with those contacts who are ready to commit.

- **Contracts management and sales trust accounting:** Create letters easily and keep accurate track of sale conditions and key dates, all while managing your trust transactions from one intuitive platform.

- **Sync your agency:** With your calendar, notes and tasks all in one place, you'll have a high-level view of your agency's day-to-day operations.

- **Import leads automatically:** Manual entry is a thing of the past. EagleCRM automatically loads enquiries, responds to them, and then attaches the enquiry to your listing. Additionally, it also performs a social media audit, and labels the contact as a buyer or prospective tenant.

- **Mobile device access:** With the Eagle App, agents can log attendees at inspections, secure feedback, and deploy documents while they're out on the road.
- **Insight-enriched reporting:** Delve into deep business insights with comprehensive listings, staff activity, and commission reports, and more.
- **Centralised data:** Easily access information across all departments and get instant reporting via a user-friendly dashboard.
- **Single data entry:** Enter information once and use it across multiple areas of the CRM. For example, a contact can be a vendor, landlord, past client and future purchaser.
- **Simple, intuitive software:** EagleCRM offers simple communications to stay top-of-mind with clients and prospects. The platform's ease-of-use will also attract staff who want to use EagleCRM to simplify their roles.

Start removing repetitive administration and boosting agent and agency efficacy by scheduling a demo with one of Eagle Software's real estate automation specialists. Should you have any questions or require further information, please get in touch.

Book A Demo