

## Digital Note-Taking and Client Tracking

### Staying Organized, Improving Follow-Up, and Closing More Transactions

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#### Slide 2: Why Digital Organization Matters

- Real estate is a relationship-driven business
- Clients expect personalized service
- Notes help you remember important details
- Organized agents provide better experiences
- Effective tracking increases conversion rates

**Pro Tip:** The Realtor who remembers details about their clients often wins repeat business and referrals.

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#### Slide 3: What Information Should You Track?

- Contact information
- Property preferences and search criteria
- Family and personal details
- Important dates and milestones
- Communication history and follow-up activities

**Pro Tip:** Track personal details like children's names, pets, hobbies, and birthdays to strengthen relationships.

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#### Slide 4: Best Digital Note-Taking Tools

- CRM systems (BoldTrail, HubSpot, Follow Up Boss)
- Microsoft OneNote
- Apple Notes
- Google Keep
- Evernote and similar apps

**Pro Tip:** Choose one primary note-taking system and use it consistently rather than spreading information across multiple platforms.

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#### Slide 5: Creating Effective Client Notes

- Record notes immediately after conversations
- Keep notes clear and concise

- Use consistent formats and categories
- Include next action steps
- Update notes after every interaction

**Pro Tip:** End every note with a specific follow-up task and due date so nothing gets forgotten.

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### **Slide 6: Tracking Buyers and Sellers Efficiently**

- Monitor where each client is in the process
- Track important deadlines
- Record property interests and feedback
- Document financing status
- Maintain transaction milestones

**Pro Tip:** Create a simple checklist for buyers and sellers to quickly identify where each client stands.

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### **Slide 7: Automating Client Tracking**

- Set follow-up reminders
- Schedule automatic check-ins
- Use task management features
- Track communication history
- Create workflow templates

**Pro Tip:** Automation helps maintain consistency, but personal phone calls and handwritten notes still make the biggest impact.

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### **Slide 8: Turning Notes into More Closings**

- Follow up more consistently
- Provide personalized service
- Identify referral opportunities
- Build stronger client relationships
- Create a predictable business pipeline

**Pro Tip:** Most lost business comes from poor follow-up, not poor sales skills. Great note-taking creates great follow-up.

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### **Closing Thought**

**“Your database tells you who to contact. Your notes tell you what matters to them. Realtors who master both create stronger relationships, more referrals, and more closings.” – Tony Geraci**