

## **PICKING THE RIGHT CRM**

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### **CLASS OVERVIEW**

#### **Goal of This Class**

- What a CRM actually does
- Why most agents fail to use one correctly
- How to choose the RIGHT CRM
- What features matter most
- How a CRM helps increase closings and referrals

### **SLIDE 1 – TITLE SLIDE**

## **PICKING THE RIGHT CRM**

### **Building A Real Estate Business That Runs On Systems**

#### **Visual Ideas**

- Luxury CRM dashboard
  - Realtor using laptop/tablet
  - Pipeline graphics
  - Modern technology office
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### **SLIDE 2 – WHY A CRM MATTERS**

#### **“Your Database Is Your Business”**

#### **Key Talking Points**

- Most agents lose deals through poor follow-up
- Memory is not a business system
- A CRM keeps opportunities organized
- Top producers track everything

“The difference between average agents and top producers is organization and consistency.”

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## **SLIDE 3 – WHAT IS A CRM?**

**CRM = Customer Relationship Management**

### **What A CRM Does**

- Stores contacts
- Tracks conversations
- Creates follow-up reminders
- Organizes leads
- Automates communication
- Helps convert leads into closings

### **Key Lesson**

A CRM is your business operating system.

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## **SLIDE 4 – WHY AGENTS FAIL WITH CRMS**

### **Common CRM Mistakes**

#### **Problems Agents Make**

- Never entering contacts
- No follow-up system
- Overcomplicated setup
- Switching systems constantly
- Not using automation

### **Teaching Point**

The best CRM is the one you actually use every day.

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## **SLIDE 5 – FEATURES THAT MATTER MOST**

### **Must-Have CRM Features**

#### **Important Features**

- Mobile app
- Easy contact management
- Follow-up reminders
- Text/email integration
- Pipeline tracking
- Automation/workflows
- Notes & history

### **Bonus Features**

- AI tools
- Smart campaigns
- Social media integration

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## **SLIDE 6 – SIMPLE VS ADVANCED CRMS**

### **Choosing The Right Level**

#### **Simple CRM**

Best for:

- New agents
- Solo agents
- Basic follow-up

#### **Advanced CRM**

Best for:

- Teams
- Recruiting
- Large lead volume
- Heavy automation

### **Key Lesson**

Don't overcomplicate your system.

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## **SLIDE 7 – QUESTIONS TO ASK BEFORE CHOOSING A CRM**

## **Before You Buy Anything**

### **Ask Yourself:**

- Is it easy to use?
- Will I log in daily?
- Does it work on mobile?
- Can it automate follow-up?
- Does it integrate with my website?
- Can it grow with my business?

### **Teaching Point**

Technology should simplify your business — not overwhelm you.

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## **SLIDE 8 — THE POWER OF AUTOMATION**

### **Automation Creates Consistency**

#### **Automation Examples**

- Birthday reminders
- Drip campaigns
- New lead auto-texts
- Follow-up reminders
- Property alerts

“Automation helps you stay consistent even when you’re busy.”

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## **SLIDE 9 — DAILY CRM HABITS**

### **Simple Daily Routine**

#### **Every Day**

- Add new contacts
- Follow up with leads
- Update notes
- Review tasks
- Track appointments

## **Weekly**

- Clean database
- Review pipeline
- Check lead sources

## **Key Lesson**

Consistency beats perfection.

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## **SLIDE 10 – AI & THE FUTURE OF CRMS**

### **Real Estate Technology Is Changing Fast**

#### **AI Features**

- Smart follow-up suggestions
- AI texting
- Lead scoring
- Automated content
- Voice AI conversations

#### **Teaching Point**

Agents who combine relationships + technology will dominate the future.

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## **SLIDE 11 – CLOSING CHALLENGE**

### **CRM Setup Challenge**

#### **This Week:**

- Choose ONE CRM
- Import your contacts
- Set follow-up reminders
- Organize your pipeline
- Commit to daily use

Your database is not just contacts...It is future income.