

## **CRM and Database Mastery**

### **Slide 1 – Cover Slide**

#### **CRM and Database Mastery**

- Building Relationships That Generate More Business
- Organize, Follow Up, and Close More Deals
- Presented by Tony Geraci
- Century 21 HomeStar
- Weekly Coaching & Training

**Pro Tip:** Your database is your business. Treat it like an asset.

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### **Slide 2 – Why Your Database Matters**

- Your database is your largest source of referrals.
- Past clients are easier to convert than new leads.
- Consistent communication creates repeat business.
- A strong CRM prevents opportunities from slipping away.
- Top agents build systems, not just contacts.

**Pro Tip:** Every person you know should be in your database.

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### **Slide 3 – What Information to Track**

- Name and contact information.
- Source of the lead.
- Birthday and home anniversary dates.
- Family and personal notes.
- Buying and selling goals.

**Pro Tip:** Notes create relationships and help you stand out.

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### **Slide 4 – Organizing Your Contacts**

- Create categories and tags.
- Separate buyers, sellers, investors, and past clients.
- Use lead source tags.
- Prioritize hot, warm, and cold prospects.
- Remove duplicates regularly.

**Pro Tip:** A clean database saves time and increases follow-up.

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### **Slide 5 – Follow-Up Systems**

- Create automated drip campaigns.
- Schedule calls and reminders.
- Send monthly market updates.

- Follow the 36-touch system.
- Stay top-of-mind all year.

**Pro Tip:** Fortune is in the follow-up.

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#### **Slide 6 – Daily CRM Habits**

- Add new contacts immediately.
- Update notes after conversations.
- Complete scheduled tasks daily.
- Track appointments and transactions.
- Review your pipeline every morning.

**Pro Tip:** Spend 15 minutes daily managing your CRM.

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#### **Slide 7 – Automation and Technology**

- Use email campaigns.
- Set up text reminders.
- Create task sequences.
- Use AI tools for follow-up.
- Sync calendars and mobile devices.

**Pro Tip:** Automate consistency, not relationships.

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#### **Slide 8 – Database Growth Plan**

- Add 5 contacts daily.
- Reconnect with past clients.
- Ask for referrals consistently.
- Host client appreciation events.
- Measure conversion rates.

**Pro Tip:** The agent with the largest and best-managed database usually wins.

If you'd like, I can also create this as a PowerPoint (.pptx) file with HomeStar branding and graphics. ■