

10 questions

to ask when looking for a
real estate crm



A good CRM offers many benefits, including saving you time, organizing your client database and business, and simplifying client follow-up so you can build a healthy repeat and referral business. CRM stands for “customer relationship management,” and that’s exactly what a good real estate CRM can do for you. BUT not all CRMs or CRM providers are created equal.

A good CRM offers more than just features. Before you commit yourself to buying and learning a new system, make sure it offers everything you need. **Ask these questions to help guide you with such an important decision:**

1

What sort of support do you provide?

Don’t enter your card information and get access to a system where you can’t find which way is up! First find out if they offer free live setup, training, coaching and support. You can also check for online DIY articles which can help you get more from your CRM down the road.

2

How long have you been in business?

Don’t bet your business on a company that may not be around later, or one that just popped up claiming to have the “next-best thing” in CRM.

3

How will you protect my data?

Your CRM holds your valuable client database. A top-tier system offers much more than just features. Think about things like stability, reliability and system uptime.

4

Can I take my data with me?

In real estate, your book of business is everything. Keep your contacts in a system that belongs to you, and don’t partner with a vendor that won’t let you take your database should you choose to leave.



5

What's included in the price?

A lot of CRMs appear cheap, until you start adding up the extras. Do they charge extra for a text number, email tracking, integrations, batch emails or other features?

6

Do you integrate with 3rd party systems?

Are leads automatically captured from almost any lead provider and do they integrate with email and marketing systems and your MLS?

7

How will you help me stay top of mind *and* provide value?

A CRM should do more than store your data. What sort of marketing options are offered? Are they included in the price? Can they help you avoid email spam filters? Is email content generic, or can it be personalized with real estate info or hard-to-find MLS data?

8

How will you help me build my database?

Make sure your current database and any new leads can be easily added to your CRM, and find out what tools are offered to help grow your database. Is a high quality, mobile-friendly website included in the price and will it help you generate leads, tell your story and showcase your listings? Can you capture leads from social media?

9

How do you help me know who to contact next?

Client follow up should be simple. Your CRM should help you categorize and sort your contacts, and tell you who to contact next. Bonus points if it gives you follow up options - like email templates - so you can follow up while standing in line for coffee.

10

Is your CRM mobile-friendly?

Do you have everything you need in the palm of your hand so you can stay informed and productive no matter where you are?



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