

## Buyer's Guide: CRM Solutions

Would you like to more effectively manage your interaction with clients? Here's a look at current software and services that provide task-based tools and strategies, from initial contact through follow-up after the sale.

By Michael Antoniak | June 2010

Real estate is a people business. It continually challenges you to know clients and their desires, be aware of where they are in the buying or selling process, and keep your name fresh in mind for the brand building that can transform today's lead into tomorrow's referral.

These multifaceted issues could easily overwhelm anyone who doesn't have some sort of system in place to manage it all. Fortunately, answers are readily available and relatively affordable through customer relationship management software and Web-based services.

At the core of every CRM solution is a contact management system for creating records, then planning and tracking activities related to each. CRM builds on that by providing the tools and strategies to nurture the relationships that will bring more clients and more listings in the future. There's much more of a one-to-one marketing component to CRM.

Properly deployed, CRM keeps you organized, prompts you about various upcoming tasks, tracks your work for clients, and helps promote your services. The right management system reflects your personal preference and work style. Some may find all they want in the basic contact management included with their computer or smartphone. Others require more of an integrated CRM workflow for communications and transactions, with a built-in marketing module.

CRM solutions for real estate can be divided into classes and categories. As with all software, you can choose between applications that you install on your hardware or Web-based services. Then there's the off-the-shelf solutions developed for the typical business user and highly specialized real estate CRM tools. Straddling this divide are several add-ons that transform the generic offerings into real estate CRM systems.

For real estate professionals, implementing some kind of CRM system should be regarded as a building block of long-term success.

### In this Buyer's Guide, you will also find:

[Specs That Matter for Real Estate](#)  
[Shop CRM Solutions by Price](#)  
[Shopping Glossary](#)  
[What Others Are Saying](#)



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## CRM Solutions: Shop by Budget

Find a system that fits your budget and your business.

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As indicated in the sampling of CRM products included here, several software programs are available, but more vendors are moving toward developing and marketing CRM as a Web-based service.

### Choose what fits your budget:

Less than \$100  
\$100-300  
\$300 or more

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### Budget Buyer

For those with less than \$100 to spend, choices range from texting solutions to sophisticated Web-based services.

#### Smart Text CRM

[Smart Text CRM](#)

\$4.33 for a single listing

This system uses texting to promote listings, capture potential client information, and launch marketing campaigns. Consumers enter a text code displayed on a sign outside a home and the system automatically transmits key listing data to their phone. At the same time, it captures and enters their contact information into a Web-based CRM database. The system tracks their preferences so that you can text them information on changes or other listings of interest.

#### Heap CRM

[WBP Systems](#)

\$9/month subscription fee

HEAP is a Web-based CRM solution for small business. Users access their account dashboard from their Web browser, then organize information and track activity through a variety of Web forms and windows. The software handles contacts, prospects, and tasks, and includes calendar and scheduling functions.

#### AllClients

[AllClients LLC](#)

\$21.95/month subscription fee

This Web-based solution is designed to be easy to learn and operate with an intuitive browser-based interface. Users can define how they want client records organized, create Web forms for capturing client data off your site, plan and track activity based on the contact or transaction, and create drip e-mail campaigns. It also includes a "referral tree" to identify the contacts who do the most to feed your business.

#### Top Producer 8i

[Top Producer Systems](#)

\$39.95/month subscription fee

The latest version of this popular real estate contact and CRM system has been updated with social media integration. Users can set the software to monitor what clients are posting about themselves on social media. It includes prompts to monitor your contacts' status and provides easy access to neighborhood conditions and trends. Several add-on modules are available.

#### SalesForce.com Professional

[SalesForce.com](#)

\$65/month per-user subscription fee

This version of SalesForce provides a Web-based contact and CRM solution for an individual or team. Users can track all activity related to an unlimited number of contacts, capture leads from a Web site, and plan and monitor tasks based on the type of contact or transaction. The Professional version adds customizable reports and analytics, customizable user dashboards, and mass e-mail and marketing capabilities. All information can be shared easily with designated team members.

#### Real Estate Client Management

[Real Estate Client Management](#)

\$89 (requires Microsoft Outlook)

This Outlook add-on customizes it for the specialized information and activity management requirements of real estate. Its forms are designed to take advantage of Outlook's familiar interface and operation for organizing, planning, and tracking activity with each type of client and with everyone associated with a transaction. An optional add-on adds drip e-mail capabilities.

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## Mid-Range Buyer

Between \$100 and \$300, choices include the latest versions of dedicated CRM software and specialized solutions for working "in the cloud."

### Outlook 2007

[Microsoft](#)

\$109.95 as a standalone product; also included in Microsoft Office suite, with prices starting at \$149.95

This Windows software remains one of the most popular programs for basic information and time management. Its user interface is designed for intuitive organization of e-mail, contacts, scheduling, and activities associated with each name in the database. Users have some degree of customization and can share contact records and calendars with others.

### RealFutureCRM

[Adigida Solutions](#)

\$159/year for Solo version

This Web-based software offers an inexpensive answer to the specialized needs of real estate professionals. It includes tools and templates for organizing contacts, listings, transactions, and the tasks, activities, and correspondence associated with each record. Subscribers can also create and automate drip e-mail campaigns. Free and step-up versions are also available, as well as an optional ProspectConverter for managing leads.

### Daylite Productivity Suite

[MarketCircle Inc.](#)

\$189

This software program gives Mac users a system for organizing information and tracking activity. A real estate template set is available to customize the software for this industry. With this free add-on to Apple's Mail program, users can organize contacts by type and use "activity sets" to plan and track tasks associated with the different types of opportunity each of those contacts represents.

### Maximizer CRM 11

[Maximizer Software](#)

\$229 for single user

This Windows application adds CRM functions to the company's contact management solution. A real estate template, available as a free download, customizes the software for real estate contacts, marketing, and transactions. It includes task and activity management templates for monitoring the progress of different types of transactions and keeping buyers and sellers informed of developments. Maximizer Mobile CRM, which accesses all records for select smartphones, is also included. Group and enterprise versions also available

### ACT! for Real Estate v12

[Sage North America](#)

\$299.99

This latest version of the customized real estate edition of ACT! for Windows adds several new contact management and CRM features. The user interface has been redesigned for easier navigation through the program's features. It can automatically gather and integrate information and profiles from popular social networking sites into contact records. There are also templates for automated email marketing campaigns that can be administered through an optional service, ACT! E-marketing.

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## High-End Buyer

The CRM solutions above \$300 offer a great deal of functionality across different platforms.

### Real Estate Success Tracker

[Real Estate Success Tools](#)

\$399

Available for Windows and Macintosh computers, this software offers an integrated system for building and managing business. It's set up for managing client information, properties, and transactions. Users can plan and monitor activities associated with records, create action plans, and develop and launch marketing campaigns. An optional upgrade lets users sync data with an iPhone or iPod touch. Multiuser versions are available.

### **FasTrak CRM**

#### [Marketing Pro Consulting](#)

\$250 set-up fee, then \$99/month; Salesforce.com subscription also required

This Web-based solution adds real estate functionality to Salesforce.com. It transforms the service into a system for organizing client information, managing transaction activity and leads, and developing a referral network. It also includes templates for e-mail marketing campaigns, specialized real estate reports, and recruiting tools. Data syncs with Outlook; iPhones and Blackberry smartphones are also supported.

### **Masterdigm CRM**

#### [Masterdigm](#)

\$399 set-up fee, then \$50/month

This Web-based real estate CRM system provides a framework for managing contacts, transactions, and activities associated with each. It includes customizable Web forms for capturing leads using your Web site and automatically adding them to contact database. An e-mail marketing campaign feature lets subscribers create and manage an unlimited number of automated marketing campaigns.

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