CRM Checklist

1. Ease of use? Does it fit with the way you do business and the way you work? Is it extremely analytical or easy to use? Get to know it!
2. Can you use the CRM to create and launch action/activity plans and use them. This allows you to put a series of activities in order. For example, when you get a new listing, you want to be able to launch the listing plan, put a sign in the yard,put a lockbox on, order the virtual tour, get seller sign-off on mls info verified, contact the seller after it’s on the market, and so on. In other words, your listing checklist goes in here – list date, expiration date, reminder dates, and all activities associated with that plan get scheduled, put in the calendar, and have reminders for tasks.
3. Can you put your sphere in your CRM in a very categorized fashion?
	1. Categorize every person in relationship to you
		1. People can be in more than one category!
		2. First-time homebuyer, past client, geographic farm, sphere of influence, church group, attorney, carpet layer, contractor
		3. A leads, B leads, C leads (ready to buy? Buying in 3 – 4 months, longer)
4. Can you import third-party content into the CRM program? There are programs you can buy that will automatically install into your CRM to help you keep in touch with your clients. An example of a program is Dave Beson’s LetterWriter program. These letters install into CRM programs and come with action plans attached, so they are automated and give you the ability to communicate with a client on an ongoing basis. (We can look at his letters later, but mainly I just want you to know how to import third-party content into your CRM, so you will know how to use this tool!)
5. Find out about the mobile platform and what type of marketing plug-ins does it have? (Market Snapshot, Facebook, LinkedIn & Twitter integration?) And how is the integration with various lead sources? Your rep should be able to educate you on all of this!
6. How can you use it to help you in keeping your buyers and sellers happy with the service they receive and IN THE LOOP during the transaction?
7. Is there an easy way to use it for record keeping and ease of use for communication with clients? (email, phone, text, etc.)
8. Can it create landing pages? If so, that will be wonderful!
9. Will it convert text messages to email?
10. Basically, just get to know the CRM programs backwards and forwards regarding all tools they have to offer.