CRM and RBO Fundamentals

Use RBO to keep relationships, follow-up, transaction records, and deadlines organized. At List n Show, Realty Back Office, or RBO, is the company's integrated customer relationship management and transaction management platform. Every company transaction must be maintained there.

This guide explains how to use that system as part of your daily work. You will learn what to record, when to create a transaction, how to prepare a usable file, and how to work with Transaction Coordination while remaining responsible for client representation.

How to work through the guide

Read each section, complete its practice activity, and compare your response with the suggested answer. Use your authorized RBO account for navigation and review. Keep hypothetical practice information in a notebook or approved training environment rather than creating fictitious records in the company's live system.

The navigation labels and field examples in this guide follow the company training material. Your available screens and required fields may depend on your role and transaction. If your account differs, ask Transaction Coordination or the broker for the appropriate workflow.

What you will be able to do

- Maintain useful contact records and schedule specific follow-up.
- Find the information that needs attention on your dashboard.
- Create transaction files at the required point and maintain accurate records.
- Prepare documents and resolve file deficiencies.
- Coordinate with TC and recognize issues requiring broker involvement.
- Follow daily, weekly, and monthly routines that support client service.

Your route through the guide

1 Make the CRM part of your business

2 Navigate RBO and review your dashboard

3 Create and maintain transaction files

4 Prepare documents and resolve deficiencies

5 Work with Transaction Coordination

6 Build daily weekly and monthly habits

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1 Make the CRM part of your business

A customer relationship management system, or CRM, gives you a reliable record of people, conversations, and next steps. It helps you act on what you promised rather than relying on memory. The benefit comes from keeping the information current and using it to guide your work.

Understand the company requirement

List n Show requires agents to use RBO for all company transactions. You are expected to maintain current contact information, record meaningful conversations, track leads, schedule follow-up, and maintain transaction records. A separate personal calendar or email folder does not replace the official company file.

Know the three functions of RBO

- Relationship management: contacts, leads, sphere of influence, communication history, tasks, and pipeline visibility.
- Transaction management: transaction creation, documents, deadlines, contingencies, participants, financial information, and commission requests.
- Compliance support: file review, deficiency tracking, broker oversight, document retention, and transaction records.

Your sphere of influence, or SOI, is the network of people you know and maintain relationships with. Your pipeline is the set of potential and active business opportunities you are following. Keeping both visible helps you serve current clients while maintaining future relationships.

Create contact records that support action

Record each meaningful business relationship, including leads, prospects, clients, past clients, referral sources, vendors, and community contacts. Maintain names, available phone numbers, email and mailing addresses, how you know the person, communication preferences, and relevant interaction history.

Add relationship details only when useful and appropriate. A record should help you remember what matters and keep commitments. Use relevant, professional notes and follow company practices for access and contact information.

Give each follow up a purpose and date

“Call sometime” is easy to postpone. “Call Jordan Thursday to answer questions about the buyer consultation” tells you what to do and why. After a meaningful conversation, update the record and schedule the agreed next step. If someone’s timing changes, revise the task rather than repeatedly carrying an obsolete reminder.

Put it into practice

Choose five existing contacts. Check their details, category, last interaction, and next action. In your notebook, rewrite one vague reminder as a specific task with a date and purpose.

Check your understanding

You have a client’s phone number in your phone and the contract in your email. Is that enough?

Suggested answer: No. Maintain the relationship record and official transaction file in RBO as required. Information stored elsewhere does not replace those records.

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2 Navigate RBO and review your dashboard

The dashboard is your starting point for deciding what needs attention. It is useful only when the underlying contacts, tasks, transaction stages, and dates are accurate. Begin by looking for commitments due now and changes that affect clients.

Know where to look

- Contacts holds people and relationship history. Use it to find a person, review past conversations, and plan follow-up.
- Transactions holds official files for listings, buyer transactions, pending and closed sales, and cancelled transactions.
- Tasks identifies work to complete. Review due and overdue items, missing documents, disclosures, and transaction milestones.
- Activities records meaningful events and conversations. Use it to understand what has happened and what changed.
- Financials contains commission information, company fees, referral fees, processing fees, and other charges.
- Requests supports commission requests, internal submissions, and transaction-related administrative processing.

Understand the transaction sections

Within a transaction, Details contains property information, escrow information, contingency dates, closing information, and status. Documents holds agreements, disclosures, reports, amendments, and correspondence. Contacts identifies the buyers, sellers, attorneys, lender, other agent, inspectors, and other participants. Financials and Requests support financial review and processing.

Distinguish a task from an activity

A task is work that needs to happen, such as obtaining a missing signature. An activity records what happened, such as receipt of an executed amendment. The same development may require an activity entry, a document upload, updated details, and a new task. One entry does not automatically substitute for all the others.

RBO generates transaction tasks to support agents and TC. Review those tasks rather than assuming every obligation is covered automatically. Compare the file with the transaction documents and raise missing or unclear items with TC or the broker.

Use a consistent review order

Check tasks and approaching transaction deadlines, then review new activities and changes. Identify clients and contacts needing a response. Review the pipeline for opportunities that need a next step. Keep access secure and use your authorized account.

Put it into practice

Without changing a live transaction, locate Contacts, Transactions, Tasks, and Activities. Open a file you are authorized to review and identify its stage, next deadline, missing items, and participants. Note any area you cannot locate for a question to TC.

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Check your understanding

The activity log says a closing was rescheduled. Can you assume all other records are updated?

Suggested answer: No. Verify the closing details, related tasks, supporting documents, and communication with TC. Make the applicable updates through the company workflow.

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3 Create and maintain transaction files

The transaction file is the official company record used for operations, compliance review, coordination, and future reference. Creating it promptly gives TC and the broker visibility while there is still time to address missing information or approaching deadlines.

Create the file at the correct point

- Listing: promptly after execution of an approved listing agreement, including the Exclusive Right to Sell Listing Agreement [408] or an applicable Exclusive Agency Listing Agreement.
- Buyer transaction: promptly after offer acceptance and execution of the Purchase & Sale Agreement [507], or earlier if directed by the broker or TC.
- Other transactions: maintain rental, vacant land, multi-family, commercial, and applicable referral transactions in RBO. Obtain direction for the appropriate setup when the workflow differs.

Follow the transaction creation workflow

Navigate to Transactions and select + ADD TRANSACTION. Complete all fields required for the transaction and your role before saving. The source identifies Agent Name, Property Address, Transaction Type, Transaction Stage, and Agent Role as generally required; additional fields depend on the side represented.

In this workflow, "Listing Agent" refers to the listing side. "Selling Agent" refers to the agent representing the buyer. Select the role that reflects your actual representation and ask for help if the choices do not fit the transaction.

Enter information from the transaction records

Complete the property address, city, ZIP code, property type, and MLS number when applicable. Enter the transaction type, stage, side, relevant contract and listing dates, and known closing date. Include parties and participant contacts as they become available.

Listing information may include list price, listing-side commission and type, listing date, and expiration. Buyer-side information may include list price, sales price, selling-side commission, stage, and buyer details. Verify financial entries against the applicable agreements and company requirements rather than assuming an amount.

Financial information may include gross commission, company fees, referral fees, Document Processing & Storage Fees, and other applicable charges. Complete required information accurately; ask TC or the broker about missing or unclear entries rather than guessing.

Keep the file current after creation

Upload documents promptly, record significant activities, update relevant dates, and keep the stage accurate. Source examples include Active, Under Deposit, Pending, Closed, Cancelled, and Expired for listings, with Active Buyer among buyer stages. Use the applicable company status definitions.

Put it into practice

In your notebook, outline the setup of a new listing using an executed agreement. Identify the creation trigger, fields to verify, initial documents, and questions for TC. Repeat for a buyer whose purchase agreement has just been executed.

Check your understanding

A buyer has completed a consultation but has no accepted offer. Must you always create a transaction at that point?

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Suggested answer: The standard trigger is an accepted offer and executed purchase agreement. Create it earlier when the broker or TC directs you to do so; keep CRM records and follow-up current meanwhile.

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4 Prepare documents and resolve deficiencies

A useful transaction file is complete, readable, and consistent. Before uploading a document, confirm it belongs to the right transaction, includes every page, and has the required signatures, initials, and dates. Review the uploaded copy to confirm that it can be opened and read.

Listing document reference

Examples: Listing Agreement [408], Real Estate Disclosure Notice [501], Fair Housing Notice [401], Broker Commission Advisory [402], Property Condition Report [403], Lead Paint Disclosure [405], Concrete Advisory [407], Photography Authorization [421], Open House Notice [432], and Audio-Video Disclosure [430], plus other required forms.

Buyer document reference

Examples include Buyer Representation Agreement [503], Real Estate Disclosure Notice [501], Foundation Advisory [506], Purchase & Sale Agreement [507], Dual Agency Consent [504], Designated Agency Consent [505], riders, addenda, property disclosures, inspection reports, amendments, mortgage commitment, and other required forms.

These lists are references, not a determination that every form applies to every transaction. Use the applicable company checklist and broker direction to identify the required forms and versions. Do not infer an agency arrangement from a form's presence in this guide.

Apply four document checks

- Complete: every required page is included, with no missing attachments.
- Legible: pages are correctly oriented, readable, and free of cut-off text.
- Executed: required signatures, initials, and dates are present.
- Consistent: names, property address, price, dates, and commission information agree with the applicable records and amendments.

Name documents so others can find them

Use clear names such as "123 Main St - Listing Agreement" or "123 Main St - Mortgage Commitment." Avoid names such as "Scan001" or "Contract Final Final." Follow company instructions for distinguishing versions and retaining records; do not delete prior documents simply to make the file look tidy.

Respond to a deficiency notice

Read the notice promptly, identify the exact missing or incorrect item, correct it as quickly as possible, and notify TC once corrected. If you cannot resolve it or need direction, explain the obstacle and escalate it. Do not mark the issue complete simply because you sent a request to someone else.

The broker may require corrections or additional documentation and may suspend processing until deficiencies are cured. Repeated deficiencies can lead to additional training, broker review, delayed commission processing, or corrective action under company policy.

Put it into practice

Review an authorized file or a training document. Apply the four checks and draft a short correction message to TC stating the file, issue, corrective action, and any remaining item.

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Check your understanding

A readable purchase agreement is missing one signature. Is the upload complete?

Suggested answer: No. Readability does not make the document fully executed. Address the missing signature through the appropriate process and notify TC when corrected.

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5 Work with Transaction Coordination

Transaction Coordination, or TC, supports organization and administration. You remain the client's primary advisor, negotiator, and relationship manager. A clear handoff helps TC support the transaction.

Know when coordination begins

On the listing side, TC generally becomes involved after the listing agreement is executed, the transaction file is created, and required listing documents are uploaded. On the buyer side, the usual starting point is the fully executed purchase agreement, created file, and uploaded required documents. Involvement varies with the transaction and company or broker direction.

Understand the division of responsibilities

- TC reviews and organizes files, verifies contacts, checks documents, and helps identify deficiencies.
- TC tracks deadlines and milestones, coordinates participants, and supports document collection, financial processing, and closing coordination.
- You conduct consultations, explain the process, communicate with clients, manage expectations, and provide representation within your professional role.
- You handle offers, counteroffers, price, repair and credit negotiations, extensions, contracts, disclosures, and required signatures.
- The broker handles escalated questions involving legal interpretation, disputes, agency concerns, and risk management.

TC does not present or negotiate offers, recommend terms, interpret legal language, draft legal provisions, or provide legal, tax, financial, agency, or strategic negotiation advice. Do not treat those limits as permission to provide advice outside your own role; involve the broker and appropriate professional when needed.

Communicate changes promptly

Tell TC about amendments, extensions, price or deposit changes, contingency modifications, inspections, mortgage commitments, appraisals, clear-to-close, and rescheduled closings. Share financing concerns, missing documents, title issues, attorney delays, disputes, and escalating client concerns early. Update the relevant RBO records as well.

Identify the transaction, change, supporting document, affected dates, action needed, and urgency. Example: "123 Main St: closing changed to May 27 by executed amendment. Amendment uploaded and closing detail updated. Please review related tasks." Use confirmed facts.

Escalate to the broker promptly

Examples include threatened litigation, contract interpretation disputes, alleged disclosure failures, Fair Housing concerns, misrepresentation allegations, agency or procuring cause disputes, wire fraud concerns, potential errors and omissions claims, client complaints, cancellations, earnest money disputes, financing collapse, and unusual contractual situations. When unsure, contact the broker rather than waiting for a routine review.

Put it into practice

A client asks TC to negotiate an inspection credit while a deadline approaches. Write who handles the negotiation, what you will tell TC, and when broker involvement may be needed.

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Check your understanding

Can you assume TC owns every deadline after the handoff?

Suggested answer: No. Continue reviewing deadlines and tasks, provide changes promptly, and coordinate who is doing what. TC support does not replace your responsibility for representation and communication.

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6 Build daily weekly and monthly habits

RBO becomes useful through regular attention. Protect time for relationships and business development while responding to urgent client needs and contractual obligations. Adjust the routine to your workload without allowing records and commitments to go unattended.

Daily review and action

- Review due and overdue tasks, approaching deadlines, and changes in active transactions.
- Respond to clients and participants, complete promised follow-up, and communicate important developments to TC.
- Conduct relationship and lead follow-up activities appropriate to your business and approved practices.
- Enter new contacts, record meaningful conversations, upload documents promptly, and schedule the next actions.

The company recommends 5 to 10 meaningful conversations per day, 1 to 2 hours for lead generation, and at least 15 to 30 minutes for CRM work. These are recommended planning targets, separate from the company requirement to maintain records and use RBO. Measure actual conversations separately from attempted calls or messages.

Arrange your day deliberately

One example is a morning CRM review followed by protected follow-up and business development, midday consultations and client work, and a late-afternoon record and TC review. Community activities or follow-up conversations may take place at other times. Do not postpone an urgent document or deadline update until the administrative block.

Weekly business review

Review SOI contacts, referral thank-yous, active buyers and sellers, new prospects, pending transactions, and past-client follow-up. Check deadlines, missing documents, inspections, mortgage commitments, and upcoming closings. Coordinate outstanding items with TC. Review marketing and lead sources, including open houses, website inquiries, referrals, social media, and other channels you use.

Monthly business review

Review listings obtained, buyers represented, closings, referrals, and sources of business. Check CRM health: missing or outdated information, duplicate records, inactive leads, and contacts without a next action. Choose a skill to improve, such as contracts, negotiation, pricing analysis, marketing, or technology.

If you review conversion rates, define the stages and time period consistently. For example, consultations divided by leads in the same defined group measures a different result from closings divided by consultations. Record the counts as well as the percentage so you can interpret small samples sensibly.

Put it into practice

Reserve daily CRM time, a weekly file and pipeline review, and a monthly business review. For the coming week, identify one overdue commitment to resolve and one recordkeeping habit to improve.

Check your understanding

Does hitting a conversation target make an incomplete transaction file acceptable?

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Suggested answer: No. Activity goals support business development; they do not replace required transaction records, client service, or timely attention to deadlines.

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Your first 30 days

Use this plan to establish the workflow. Practice activities help you learn, but actual transactions and deadlines require prompt action from the start. Do not wait for a later week to complete current file obligations.

Week 1 Confirm access and organize relationships

Confirm authorized access to RBO and locate the dashboard, contacts, transactions, tasks, activities, financials, and requests. Review company instructions for your role. Update a manageable set of existing contacts and assign specific follow-up. Note any setup or navigation questions for support.

Completion check: you can find the main work areas and explain how a contact record leads to a dated next action.

Week 2 Practice the transaction workflow

Use an approved training environment or a written scenario to walk through a listing and a buyer transaction. Identify the trigger for creating each file, required fields, documents, participants, financial information, and dates. Review an authorized real file with TC if available and appropriate.

Completion check: you can explain when to create a transaction and identify missing information without inventing entries.

Week 3 Strengthen file quality and coordination

Apply the document checks to your current files. Resolve outstanding deficiencies and notify TC of corrections. Confirm how your team handles changes, requests, deadline coordination, and escalation. Practice a concise handoff message and a change notification using a written scenario.

Completion check: TC can understand the file's current state, what changed, and which actions remain open.

Week 4 Establish the recurring review

Complete a weekly pipeline and transaction review, then review business activity and CRM health. Identify one recurring source of missing information or delay and change the habit that causes it. Set next month's review dates and a focused learning goal.

Completion check: your calendar supports a repeatable routine, and priority records contain useful next actions.

Continue with the related agent guides

Sphere of Influence develops relationship-building and long-term follow-up. Lead Generation Systems addresses pipeline development. The Listing Process covers seller representation through contract execution and TC handoff. Buyer Representation Process covers buyers from first contact through contract execution and TC handoff.

Use these guides alongside company procedures, TC support, and broker direction. The practical goal is a reliable record of your business: people you know, commitments you have made, transactions in progress, and actions you need to take next.

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CRM and RBO Fundamentals

Worksheets and readiness review

Copy these prompts into your notebook or use them during an authorized file review. Keep the official records and required updates in RBO.

Contact and follow up review

Contact and relationship category: _____

Last meaningful conversation and relevant notes: _____

Communication preferences and information to update: _____

Next action with purpose and due date: _____

Transaction setup and handoff

Property and transaction side: _____

Creation trigger and current stage: _____

Required documents uploaded and checked: _____

Participants and contact information verified: _____

Key dates and supporting documents verified: _____

Financial entries verified and questions remaining: _____

Open items with responsible person and due date: _____

TC notified and any broker issue escalated: _____

Weekly review prompts

Which deadline needs attention first? Which documents or signatures are missing? What changed that TC needs to know? Which client needs an update? Which contact needs follow-up? Does every priority opportunity have a next action? What must be escalated to the broker?

Readiness scenarios

1. A signed listing agreement remains in your email. What comes next?
Create the transaction promptly, complete required information, upload and verify applicable documents, and follow the TC handoff workflow.

2. A signed amendment changes a contractual date. Is uploading it enough?
No. Update affected details and tasks as appropriate, record the development, and notify TC promptly. Escalate unclear implications to the broker.

3. A client disputes the meaning of a contingency. Should TC interpret it?
No. Contact the broker promptly for direction on the interpretation issue and appropriate professional involvement. Keep TC informed.

Your next commitment

One action I will complete today: _____
One workflow question I will resolve: _____
My next weekly review date: _____

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