Technology CRM and Marketing Systems

Use technology to remember commitments, organize information, communicate consistently, and make more time for clients. A useful system makes your next action clear. Your judgment, advice, and personal attention give that action meaning.

This guide explains the purpose of the company's core systems, how to build and maintain your contact records, how to plan useful marketing, and how to automate routine work without losing personal communication. Start with a small set of reliable habits before adding more tools.

How to use this guide

Read the chapters in order and complete the practice activities in your approved systems. Use the self-check answers to test your understanding. Finish by completing the setup plan and worksheets. You do not need to master every feature to begin; you need a dependable way to record people, promises, and next steps.

The workflows describe how to organize your work rather than specific buttons or vendor features. Confirm current access, approved tools, and company procedures through training and broker support before configuring your systems.

Your route through the guide

1 Give each system a clear purpose

2 Set up your relationship database

3 Use the CRM every day

4 Create useful marketing and social content

5 Plan email newsletters reports and video

6 Automate repetitive work thoughtfully

7 Maintain professional and efficient systems

Your first 30 days

Worksheets and readiness review

What you will create

A map of your core tools, a complete sample contact record, a daily and weekly CRM routine, a practical marketing calendar, and one reviewed automation. Together, these should help you see who needs attention and follow through consistently.

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1 Give each system a clear purpose

Begin with the business task, then choose the system that supports it. Adding more software can create duplicate work, conflicting reminders, and missed follow-up. A clear division of responsibilities helps you find information and know where to record the next step.

Understand the core systems

- CRM means customer relationship management. Use it for contacts, leads, sphere of influence, follow-up, marketing campaigns, relationship history, and referrals.
- RBO supports transaction management, transaction files, compliance, activities, deadlines, and commission requests.
- Electronic signature tools support signing agency forms, contracts, riders, and amendments through the approved process.
- The multiple listing service, or MLS, supports listings, property searches, market data, and client collaboration.
- Marketing systems support email campaigns, social media, newsletters, and market reports.

Connect relationship work with transaction work

The CRM helps you remember a buyer's preferred communication method, referral source, and promised follow-up. RBO holds the transaction record, documents, activities, and deadlines under the company workflow. Keeping a relationship note in the CRM does not replace placing a required transaction document or activity in RBO.

For example, after closing, confirm the transaction record is completed through the approved process. Update the CRM with relevant transaction history, the home anniversary, and the next relationship action. This connects the client's experience without turning the CRM into a second transaction file.

Confirm how information moves

Integration means the systems work together. It does not establish that every field or document automatically synchronizes. Confirm what actually transfers, who enters it, and how you check completion. Where a manual handoff is required, make it a defined step rather than an assumption.

Use the Team Brokerage support

The company provides transaction coordination, RBO transaction management, administrative systems, compliance support, broker oversight, and training. Learn the division of work and provide accurate information promptly. These resources support your client service; you still need to communicate, advise, manage expectations, and respond to requests.

Put it into practice

List the tools you currently use and assign one primary purpose to each. Identify one place you enter the same information twice. Confirm whether both entries are necessary and write a clear handoff step for any information that must appear in two systems.

Check your understanding

Does a CRM reminder about a transaction replace the required RBO record?

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Suggested answer: No. Use RBO for the transaction record under the company workflow and the CRM for relationship follow-up. Confirm the actual transfer process rather than assuming synchronization.

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2 Set up your relationship database

Your CRM should reflect your broader network, including people who may never become immediate clients. Family, friends, neighbors, former coworkers, school and community contacts, contractors, attorneys, lenders, and past clients can all belong in your relationship system.

Build useful records from the beginning

The company's basic record includes first and last name, phone number, email address, and mailing address. Add how you know the person and useful relationship tags, such as friend, past client, referral source, contractor, attorney, or community contact. Identify missing details and complete them appropriately rather than guessing.

Record important dates when relevant, including birthdays, home anniversaries, wedding anniversaries, and closing dates. Add respectful notes about information the person has shared, such as an occupation, interest, family detail, or home project. The purpose is better conversations and follow-through rather than collecting as much information as possible.

Organize communication with A B and C categories

- A contacts are people you know well, such as close friends, family, past clients, and strong referral partners. The company recommends connecting monthly.
- B contacts are people you know moderately well, such as neighbors, former coworkers, and community members. The company recommends connecting quarterly.
- C contacts are casual acquaintances, event contacts, and online relationships. Maintain relevant visibility and let the relationship develop naturally.

These categories organize communication rather than rank people's worth. Assign a category based on the actual relationship. Combine it with role tags and communication preferences so your plan fits the individual.

Record referrals and transaction history

Track who introduced whom and when. Include relevant purchase, sale, investment, and referral history so you understand the relationship over time. A referral-source note should help you acknowledge the introduction and maintain the connection, while respecting the prospective client's private information.

Prevent duplicate and incomplete records

Before creating a record, check whether the person already exists. Review similar names and shared addresses carefully rather than assuming they identify the same person. Correct outdated contact information and use the approved process to resolve duplicates so useful history is preserved.

Put it into practice

Create or review five records. Include a relationship tag, communication category, last meaningful contact, relevant notes, referral source if known, and a next action with a date. Mark missing information for appropriate follow-up. These are practice assignments, not company quotas.

Check your understanding

Should a contact record contain every personal detail you learn?

Suggested answer: No. Keep information respectful, relevant, and useful for the relationship. Accurate notes and a clear next step matter more than the volume of data.

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3 Use the CRM every day

A CRM becomes useful when conversations lead to updated records and scheduled actions. Enter information immediately after calls, meetings, coffee conversations, open houses, consultations, referrals, and closings whenever practical. Details are easier to record accurately while they are fresh.

Use a short after conversation routine

Open the correct record, capture the relevant facts, record anything you promised, and set the next action with a due date. Update important dates or relationship changes when needed. Write notes so you can understand what happened and what to do next without reconstructing the conversation.

For example: "Jordan asked for recent sales in the neighborhood before considering a move next spring. Send the requested report Friday, then ask when another conversation would be useful." This gives the task a reason and a deadline. "Follow up sometime" leaves both unclear.

Turn reminders into personal attention

Use reminders for birthdays, home anniversaries, quarterly calls, market updates, coffee meetings, client check-ins, and referral-partner contact. When a reminder appears, review the person's circumstances and choose a suitable action. A task appearing in your CRM is a prompt to consider the relationship, not a reason to send the same message to everyone.

For a home anniversary, you might call or write: "Happy home anniversary. I hope you're enjoying another year in your home. Let me know if there's anything about the house or local market I can help with." Add information only when it is relevant and welcome.

A birthday greeting can remain simple and personal. A call, card, or short message can acknowledge the person without turning the occasion into a sales request.

Track referrals with care

Record the source of an introduction, thank the person appropriately, and schedule the prospective client's next step. Keep the source relationship active. Do not treat an introduction as proof that the prospective client has selected you or is ready to transact.

Review the CRM once a week

Review new contacts, follow-up tasks, upcoming birthdays and home anniversaries, referral sources, and important conversations. Ask who needs help, who is awaiting information, and whom you have not spoken with recently. Resolve overdue tasks deliberately by completing, rescheduling, or closing them with an accurate note.

Avoid using the CRM only for active clients or as a filing cabinet you rarely open. A useful record should make a future action easier. Regular review also helps you catch incomplete information before it causes a missed commitment.

Put it into practice

After your next three conversations, complete the record and next action immediately. Then reserve a recurring weekly CRM review. Prepare a short list of people to contact and the reason each conversation would be useful.

Check your understanding

Is marking a reminder complete the same as completing follow-up?

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Suggested answer: No. Complete the promised action or record the actual outcome and a suitable next step. The task status should reflect what happened.

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4 Create useful marketing and social content

Marketing helps people remember your knowledge, professionalism, and availability. Begin with questions people actually ask and give them a clear, useful explanation. Your content should help someone understand a situation or prepare for a conversation.

Choose questions your audience recognizes

Buyer topics may include cash needed for a purchase, earnest money, inspections, and mortgage contingencies. Seller topics may include pricing, renovation decisions, likely marketing time, and what happens after an accepted offer. Homeownership topics include maintenance, property taxes, insurance, remodeling, and local market trends.

Choose one question at a time. Explain the general process accurately and identify when individual circumstances require advice from the broker or another professional. Avoid promising a particular sale price, financing result, or timeline.

Use a practical mix of content

- Market information such as listings, sale prices, inventory, rate trends, and neighborhood statistics, with the relevant area and time period.
- Educational explanations about buying, selling, inspections, financing basics, or home maintenance.
- Community information such as charity events, farmers markets, festivals, local restaurants, and neighborhood news.
- Appropriate behind the scenes examples from listing preparation, open houses, training, or volunteer activities.

Use examples you can accurately describe. Obtain appropriate permission before sharing identifiable client stories, images, private circumstances, or transaction details. A behind the scenes post should still respect the people involved.

Set a repeatable publishing rhythm

The company recommends two to five social media posts per week, monthly market updates, a monthly email newsletter, weekly educational content, and community content as opportunities arise. These activities can overlap: a weekly educational explanation can be one of your social posts, and a market update can appear in the newsletter.

Schedule preparation as well as publication. A manageable routine leaves time to answer questions and follow up with people who respond. Visibility is more useful when it leads to thoughtful conversation.

Review professionalism before posting

Avoid constant self-promotion, political arguments, criticism of consumers or other agents, controversial commentary, and exaggerated claims. Ask whether you would be comfortable showing the post to your broker, a client, a regulator, or a judge. Review tone and accuracy across text, images, captions, and links.

Put it into practice

Plan one week of two to five posts using the company's recommended range. Include at least one educational piece and one relevant local topic. For each post, name the audience, the question it answers, and the next step you will take if someone responds.

Check your understanding

Does a weekly educational post have to be separate from your social media schedule?

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Suggested answer: No. One useful piece can fulfill both purposes. Plan overlapping work deliberately rather than creating unnecessary content.

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5 Plan email newsletters reports and video

Choose a format that helps the audience understand the topic. Email can deliver information people can return to. Market reports can explain local conditions. Video can make a short explanation feel more personal. Each format still needs accurate content and a useful purpose.

Build a focused monthly newsletter

A newsletter can combine a local market update, community news, a helpful article, and a homeownership tip. Keep each item relevant and easy to understand. Use a clear subject and a natural invitation to ask questions rather than filling every section with sales messages.

Educational series can address first-time buying, downsizing, selling strategies, or investment-property questions. Match the topic to the recipient's stated interest and communication preferences. Review the content before enrolling people in an ongoing campaign.

Translate market data into meaning

Useful reports can include median prices, days on market, inventory levels, mortgage rates, and neighborhood activity. Identify the source, geographic area, reporting period, and comparison period. Keep different measures distinct; an average sale price and a median price describe different things.

For example, a report might say that inventory fell compared with the same period last year. Explain that fewer available homes may increase competition among buyers, while acknowledging that conditions vary by property and price range. Use verified figures rather than copying an illustrative percentage into a live report.

Connect the explanation to a reasonable next step: "If you're considering a move, we can review the properties and conditions relevant to your plans." A local trend can inform a discussion without establishing the value or outcome of an individual property.

Make video clear and useful

Video topics can include a market update, buyer or seller tip, community tour, frequently asked question, or home maintenance explanation. Choose one subject, prepare a short outline, and speak clearly. Check that viewers can hear you and understand the main point. Professional, helpful content matters more than elaborate production.

Review responses and follow through

Track the questions, conversations, introductions, and requests for help that content produces. Likes and followers can indicate attention, but they do not fully show whether people find you useful. Record relevant responses in the CRM and schedule any promised information or meeting.

Put it into practice

Outline your next newsletter, one local report, and a short video on the same educational theme. Identify what you must verify before publication and where you will record responses. Reuse the core explanation while adapting it to each format.

Check your understanding

Why should a market report explain more than the numbers?

Suggested answer: Readers need context to understand what a change may mean for them. Explain the area, period, comparison, and practical implication without promising an individual result.

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6 Automate repetitive work thoughtfully

Automation can improve consistency by scheduling reminders and delivering reviewed information. Useful examples include birthday reminders, home anniversary messages, past-client call tasks, referral-partner reminders, market reports, newsletters, educational emails, and calendar appointments.

Separate reminders from outgoing messages

A reminder prompts you to decide what to do. An automated message sends content to another person. These have different consequences. Begin with reminders when personal judgment is important, then use outgoing automation only when the audience, timing, and message are appropriate.

For example, a home anniversary reminder can prompt you to check whether the person still owns the property and choose a call, card, or email. An automated anniversary email needs accurate dates, suitable wording, and a review process so outdated information does not produce an awkward message.

Define the workflow before enabling it

Write the trigger, intended audience, timing, message or task, and the person responsible for follow-through. Decide what should stop or change the sequence, such as a response, changed circumstances, or a communication preference. Confirm that the approved tool supports the intended behavior rather than assuming a feature exists.

Review a sample using an appropriate internal test record or preview process. Check names, dates, links, formatting, recipients, and the expected task or message. Confirm how you will notice failures and how you can pause the automation if it is no longer suitable.

Prevent overlapping campaigns

Review the messages a person may receive from all active campaigns. A newsletter, buyer series, anniversary email, and personal check-in can become excessive if scheduled without coordination. Use the relationship record and campaign review to reduce duplication and keep communication useful.

Keep the conversation personal

Automated acknowledgment can confirm receipt, but it does not answer a client's individual concern. Review replies and respond thoughtfully. Advice, negotiations, empathy, listening, and managing expectations require your attention. A fast response should still be accurate and appropriate.

CRM and RBO workflows should complement one another. Confirm any actual integration and check the handoff. A successful marketing automation does not prove that transaction records, deadlines, or commission requests have been completed in RBO.

Put it into practice

Design one reminder workflow before creating a message campaign. Document its trigger, recipient or task owner, timing, intended action, pause condition, and review date. Use the approved test process and confirm the result before relying on it.

Check your understanding

A client replies to an automated email with an urgent individual question. What happens next?

Suggested answer: You review the question, respond personally or involve the appropriate professional, and adjust any scheduled messages that no longer fit. The campaign does not replace client care.

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7 Maintain professional and efficient systems

Evaluate technology by whether it saves time, improves organization, supports consistency, and strengthens communication. More tools are useful only when they solve a real problem without creating unnecessary work. Keep the core workflow simple enough that you will use it reliably.

Review your tools before adding another

Identify what is difficult in your current process. Check whether an approved existing tool can address it and what training would help. Consider the time needed to learn, maintain, and review a new system, not just the appeal of a feature. Discuss changes affecting company workflows with the appropriate support resource.

Do not abandon a system that holds required transaction records simply because another product appears easier. Confirm record responsibilities and the approved process before changing where work is stored or managed.

Keep professional standards across channels

Professionalism applies to texts, social media, email, CRM notes, RBO activities, and marketing materials. Write factual, respectful notes and communications you could explain to the broker or client. Correct errors promptly and avoid putting criticism or unsupported assumptions into a permanent record.

Set thoughtful communication expectations

Clients may expect prompt replies, electronic signatures, digital documents, online scheduling, and electronic updates. Explain the approved options you can provide and how you will handle questions. If an issue needs research, acknowledge it, give a realistic next step, and follow through rather than sending an unsupported answer quickly.

Technology can organize documents and remind you of dates, but you remain responsible for understanding what the client needs and involving the right professional. Use broker guidance and training when a question exceeds your knowledge or role.

Learn selectively and keep improving

Stay current with useful changes to the CRM, marketing tools, social media, MLS, electronic signatures, and RBO. Choose a specific learning need, practice it, and confirm that it improves the workflow. You do not need every available feature to serve clients well.

Measure the result that matters

At your weekly review, consider missed commitments, overdue tasks, duplicate entries, useful conversations, and time spent maintaining tools. Review marketing for engagement, conversations, and referrals rather than popularity alone. Choose one improvement and check whether it makes your work clearer or more dependable.

Put it into practice

Identify one technology habit that saves time and one that creates confusion. Keep the useful habit, then write a specific change for the problem. Select one training topic that will help you complete the change and schedule a review of the result.

Check your understanding

What should determine whether you adopt a new tool?

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Suggested answer: A clear business need, compatibility with approved workflows, manageable maintenance, and a useful improvement in service or efficiency. A larger feature list alone does not establish value.

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Your first 30 days

Use this plan to establish a manageable system before expanding it. The assignments below support practice; they are not additional company quotas. Work within current approved tools and ask for training where access or workflow is unclear.

Week 1 Map your systems and organize contacts

List the approved tools and their purposes. Confirm where relationship notes, transaction records, signed documents, and marketing work belong. Identify who handles each handoff and whether transfers are automatic or manual.

Review your contact database, check for duplicates, and complete a small set of priority records. Add relationship categories, referral sources, communication preferences, and useful next actions. Identify missing details rather than inventing them.

Week 2 Build the daily and weekly habits

Update records after conversations and review scheduled tasks at the start of each day. Record what you promised and when you will complete it. Add relevant upcoming home anniversaries and birthdays.

Hold your first weekly CRM review. Examine new contacts, overdue actions, milestones, referral sources, and important conversations. Prepare the next contact list and make sure each action has a useful reason.

Week 3 Prepare a focused marketing calendar

Plan two to five social posts for the week, including educational content. Outline the monthly newsletter and market update. Use overlap thoughtfully so one accurate explanation can support several formats without repeatedly sending the same message to the same person.

Review accuracy, tone, audience, permissions, and follow-up before publication. Prepare a simple way to record questions and requests in the CRM. If you create a video, focus on one useful question and clear delivery.

Week 4 Test automation and review the system

Choose one repetitive reminder or reviewed communication workflow. Document the trigger, audience, timing, action, pause conditions, and review responsibility. Test through the approved process and confirm what actually happens.

Review whether the systems help you remember commitments, respond thoughtfully, and avoid duplicate work. Choose one improvement for the next month and one feature to learn. Schedule ongoing CRM and campaign reviews before adding more automation.

Readiness check

You should be able to locate a contact's last conversation and next action, explain where a transaction record belongs, prepare useful content, and identify what each active automation will do. If any answer is unclear, resolve that part of the workflow before relying on it.

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Technology CRM and Marketing Systems

Worksheets and readiness review

System purpose and handoff

System and primary purpose: _____

Information entered here and responsible person: _____

Information transferred elsewhere and how: _____

How completion is verified: _____

Contact record review

Name and relationship: _____

Contact details checked and missing information: _____

Category and communication preferences: _____

Last conversation and useful notes: _____

Referral source and relevant dates: _____

Next action and due date: _____

Marketing and automation plan

Audience and question to answer: _____

Format and publication date: _____

Facts and permissions to verify: _____

Response handling and CRM next step: _____

Automation trigger timing and owner: _____

Pause condition test result and review date: _____

Apply your judgment

Scenario 1: The CRM and RBO show different information about a transaction. What should you do?

Suggested response: Check the underlying records and approved workflow, resolve the discrepancy with the responsible person, and confirm the correction. Do not assume synchronization or use an unverified entry as proof.

Scenario 2: A past client sold their home, but an anniversary campaign still references it. What should change?

Suggested response: Correct the relationship record, pause or revise the outdated message, and confirm which other reminders depend on that information before restarting the workflow.

Scenario 3: A post receives many likes but no useful conversations. How should you assess it?

Suggested response: Treat the attention as one signal. Review whether the content helped the intended audience, prompted relevant questions, or supported relationships, then adjust the topic or follow-up as needed.

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