The Estate Agent CRM Adoption Acceleration Checklist

dezrez rezi

Table of Contents

Introduction

This seven step checklist will help you accelerate the success of your CRM implementation.

Your estate agency will thank you. Your team will thank you. And most importantly, your customers will thank you - with more sales.

> **Estate Agents see 451% growth in qualified leads after successfully adopting a CRM ready up front. Accelerating adoption will mean you get these benefits more quickly.**

The successful adoption of a CRM system provides killer benefits for both your business and your team. But to make it work, your team has to use it, and that can be a challenge for some businesses.

Step 1: Identify how CRM can support your current systems/process

The key to your team's CRM adoption success is identifying a solution that will best fit with your estate agency, sales tools, and processes. You don't want to make your team's processes more onerous; you want to make them better and more efficient.

Before you move forward with a new CRM, map out your current sales process. Once you have a clear sense of how your processes work in your current system, you'll be better equipped for identifying a CRM that will meet your needs so that you can hit the ground running.

Don't just focus on the present. Look for a CRM that can grow with you over time. **As you search consider, features that will support your sales and marketing efforts, like the ones found on the Rezi platform:**

Leads & Segmentation:
Rezi quickly and easily organises leads into segmented lists, of viewings and valuations so you spend more time following up with hot leads that are ready to become customers (and less time following up with people who will never buy).

Data Management:

Save your team time by eliminating the need to manage data. Drowning in a sea of contacts? Import your data into Rezi, clean up your list, and eliminate duplicates.

Automation:

Utilise work-flows that automatically engage with your prospects in Rezi, follow up with consistent and effective messages, and nurture your prospects so you know when it's time to strike. Rezi is the only all-in-one solution that seamlessly combines CRM and the best of Proptech into one platform for estate agents.

Calendar and Task Management:

Organise, prioritise and work through your sales activities in one place. You can manage your appointments, create todo lists, set reminders for viewings and valuations whilst streamlining your working day. On top of that you can sync your email and diary using our clever email and calendar sync work-flows.

Mobility:

Manage contacts and automate marketing from anywhere. Access and edit contact information and trigger automated follow up campaigns and communicate with customers, all while you're on the go. Mobility is a key element to any CRM and helps agents maintain a work life balance.

Step 2: Go all in from day one

The best CRM implementation's have a clear timetable. We recommend that you establish a clear go-live date and stick to it. Nothing says "problems" like delays and false starts. Additionally, it's key that you lead by example. Show enthusiasm. Dive in, and be the No. 1 adopter for your estate agency. On that note don't tolerate shadow systems. Cut the cord, day one. It might sound too hard-line, but if you allow your team to run duplicate systems in parallel with your CRM. It will be the shadow systems that get the most attention. That's a waste of your time and your money.

> **Be sure you have a complete and clear data set of all your data ready to go early on. This is the biggest step in the process, and you can speed up the roll-over by having that data ready up front.**

Step 3: Invest in training

Get a CRM that supports your training plan so that you aren't forced to break ground on your own or be forced to hire expensive consultants.

- Target the training to the job based role within your estate agency
- Reward users who train others
- Identify "Super Users" who have experience in all aspects of the CRM software
- Provide users with best practice up front and encourage them to follow them

Paul Devonald
Sales Negotiator

When we implemented Rezi there was definitely resistance because our team was unfamiliar with technology. We overcame that with a few simple strategies.

- We focused on the benefits of implementation, showing them the laborious task that took an hour (like adding contacts), could now be processed in minutes.
- Each week we ran a simple overall training session, on a specific topic in Rezi so it would become familiar and not overwhelming for staff.

- We only trained on areas that were relevant for the employee.
- When we do staff appraisals, one question we ask is “How confident do you feel using Rezi?” Based on the response, we offer additional training to fill in the gaps.

Pro tip:

One of the most common and daunting fears of any new software from the employee’s perspective is the “Big Brother” problem.

Many people worry that new metrics will create an atmosphere in which management is always watching and evaluating their performance. The truth is that CRM provides visibility that makes it easier for you to identify success, which can be rewarded: if you tie your success to the success of your sales team, you can better incentivise use, which helps eliminate the worry.

Step 4: Secure a cloud-based solution

Look for a CRM that offers cloud-based solutions. This frees your staff to connect anywhere and start relationships immediately rather than waiting to get back to the office to enter a new lead, which can be a major source of lost valuations or viewings.

Your team will also have greater freedom to work away from the office, and you'll have the ability to see what work is being accomplished even when your team isn't sitting at their desk.

In addition to freedom and mobility, a cloud-based solution is nearly always more secure and allows for your information to be 100 percent up-to-date and accurate no matter where it is accessed.

Cloud solutions make data recovery more reliable: if you rely on spreadsheets that are stored on an employee's laptop (which you shouldn't) and the laptop is left on a bench at Heathrow Airport, what is the cost to your operation? The cloud won't replace the laptop, but the cloud will protect the data and make it just as available when the employee is freaking out on the plane 10 minutes into the flight.

Step 5: Take the iterative approach - measure and improve

Measurement is one of your greatest assets with CRM. You won't get it all from day one, and you should be honest with yourself about this. Let your team know that. Take an iterative approach that allows your entire team to learn from mistakes and suggest improvements as you pick up steam.

It pays to think of milestones from the off that you can track 30, 60 and 90 days out. Measurement allows you to make improvements to your processes right away, which benefits your adoption strategy as well as your customer relationship strategy.

Step 6: Identify and communicate the (ROI)

(ROI) For your agency and your team

To understand ROI, you need to take a close look at what you're doing now with your current system. Knowing what you do right now will help you identify how your business can benefit from CRM. Once you have a clear picture of the potential ROI, identify how your agency can benefit from CRM. Once you have a clear picture of the potential ROI, identify concrete ways in which you will share the benefits of your revenue boost with your negotiator team as part of your new CRM investment.

Pro tip:

A great idea is to make CRM adoption "fun". That alone is a surprising idea, but one of the best suggestions is to celebrate success... In your weekly meeting pull reports from CRM and show that hey Julia closed £10,000 worth of sales which she generated through CRM. Show people where the money is "What better way to get them excited about the system.

Step 7: Keep everyone informed

As you discover the benefits of the new CRM in your business, make sure to take the time to communicate those wins to your team. Nothing puts wind in a team's sails like clear, measurable progress and success communicated enthusiastically.

Take the time to also praise those who are using the system to the fullest. By focusing on those who are responding positively rather than on those who are straggling behind, you'll create a culture of healthy competition.

Conclusion

The thought of implementing a new CRM can be a daunting one. Especially for small businesses that don't have the resources available to medium and enterprise level companies. Moreover, you don't want to go through the hard-work of implementing software only to have your team fail to adopt it.

The way to encourage adoption is:

1) To understand the challenges.
2) Lay out a clear plan for encouraging usage
3) Start using the new product and don't look back.

Want to go deeper to see how CRM can help you refine your marketing approach by using segmentation to deliver more personalised interactions and smarter follow up?

Speak to our sales team on the details below,
or book your demo directly into their calendars by visiting:-
https://www.dezrez.com/uk/book-demo

Call : 0333-939-8408

Email: sales@dezrez.com

Joe Diamond
Digital Marketer

- Joe Diamond joined Dezrez in 2015 to work in the marketing department. He holds a CIM Diploma in Digital Marketing. He loves to write compelling content to estate agents to make them take action. Joe enjoys working for a fast moving company like Dezrez is his dream come true. Outside the office, he is the coach for a local Under 5’s football team and dips into house renovation projects, whilst balancing his time with his four year old girl.

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