

How to choose the best estate agent CRM tool

Digitalisation has improved all of our lives. The spirit of innovation has transformed estate agency businesses with access to new markets and listing options. Estate agents and property developers should be on the go when discussing clients' needs. That's where an estate agent CRM brings quality to the game.

Temps de lecture : minute

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As an estate agent, you are likely handling different clients whilst also seeking new prospects. You want to keep every contract and appointment organised. Using a CRM helps you avoid the repetitive aspects of your job. Here's how an estate agent CRM makes your job easier:

- Quickly organise prospect data, making it easy to find information without trawling through multiple spreadsheets
- Respond to property enquiries without sifting through your inbox
- Keep track of prospects you've reached out to and how far along in the home-buying process they are
- Gather digital metrics like site activity and whether they've opened your emails (track everything in one place)
- Manage your entire sales pipeline with a bird's-eye view
- Maintain relationships with past clients
- Automate both tasks and workflow, such as email follow-ups

There are multiple CRM platforms, but not all are brilliant. These powerful tools have business communication, integration, and AI-powered insights to guide them.

To save you time, here's a low-risk way to test things out.

CRM Software for Estate Agents: Features to Look For

Marketing Automation: Marketing automation software can save you hours of time that can otherwise be spent selling property. CRM software helps sales professionals automate lead qualification and create a hub for digital marketing needs.

You can also identify the target audience and tailor your digital strategy to target and speak to the right audience.

Lead Capturing and Tracking: When choosing a CRM, you want to ensure it helps you properly capture and track leads.

These prospects come from different sources, such as digital marketing media. To convert more leads to customers, you need a tool to organise your enquiries.

Some tools, like Qobrix, can go further and match leads to properties that suit them.

Communication Tools: Estate agency is relationship-driven. You need relations starting from client status to post-sale. A great CRM simplifies this process and helps you build trust and loyalty too.

For example, a CRM will help you keep a detailed record of client interactions, preferences, and milestones. Stay one step ahead and deliver a tailored approach to your client communications.

Data-Driven Reporting: Estate agents depend on data analysis to make informed decisions. Be it tracking detailed market trends or client behaviour, a CRM can read and verify the information that matters.

You also need the ability to generate reports to learn more about your business. This includes revenue projections, marketing campaign performance, and more.

Here's a really good CRM to use:

REsimpli

REsimpli is a specially designed tool for property professionals that has many advanced features. Features like automated drip campaigns and list stacking help these professionals improve their business's overall productivity. Its analytical tools allow them to assess their marketing ROI and track performance metrics. Also, REsimpli captures leads from different sources and centralises them with CRM. All these perks make it an ideal platform for estate agents and property investors.

Key Features

- Task automation
- Call tracking tools

Street.co.uk

It was voted as the Best Overall Supplier at EA masters. It combines sales and lettings, property management and client accounting combining two native apps, seamless workflows and user experience.

Pros

- With the native app, estate agents can offer clients a more modern moving experience.
- Great support and response time of under 0 seconds and a system uptime of 99.98%.

Cons

- They're still working on adding read endpoints to their Open API.

Apex27

Apex27 has all the tools and features modern estate agencies require. It comes equipped with an easy-to-use lead generation tools help advance leads to sales, and configurable workflows mean you can create custom workflows with the triggers and actions needed for your business processes.

Pros

Great for start-ups, as for just 1 person, the software is free and fully functional. For teams it's fully scalable; as your business grows, you can add users at an affordable price.