

## 2007 SIOR FALL PROFESSIONAL CONFERENCE



### SIOR Panelists

William S.  
McCullough, SIOR  
Chesapeake Real  
Estate, Group



Carl G. Russell, SIOR  
George J. Smith  
and Son Real Estate



Mark J. Duclos, SIOR  
Sentry Commercial Real  
Estate, Services



Angela West, SIOR  
CB Richard Ellis  
Oklahoma



### Moderator

James M. Brown, SIOR  
Hawaii Commercial  
Real Estate, LLC



# How to Use CRM to Build your Business

Our business is about building and nurturing relationships. Do you want tips on how to better your relationship building and nurturing? This panel presentation will feature SIORs demonstrating how they use computer based CRM (Client Relationship Management or Contact Management) systems to enrich and extend their relationships with past, current and prospective clients.

These techniques apply regardless of what software you use, whether it's Microsoft Outlook, ACT!, RE Apps, BrokerBullpen.com, Real Estate Advantage, Palm Desktop, REA, Salesforce.com, RealHound, Goldmine or some other system.

## 1. How Do You Categorize Contacts?

- a. Groups – Brokers, Tenants, Landlords, Owners, Buyers, Lenders, Vendors, Clients, Prospects, Personal
- b. Categories
- c. ID/Status (ACT! special field)

## 2. What Data Do You Track?

- a. Lease expiration, size
- b. Property owned
- c. Needs: Leasing / Buying
- d. Personal info for relationship building
- e. How do you use that data?

## 3. Where Do You Get Your Data?

- a. Business cards
- b. CoStar Tenant
- c. STDB Online
- d. 10Kwizard.com



## 2007 SIOR FALL PROFESSIONAL CONFERENCE



### SIOR Panelists

William S.  
McCullough, SIOR  
Chesapeake Real  
Estate, Group



Carl G. Russell, SIOR  
George J. Smith  
and Son Real Estate



Mark J. Duclos, SIOR  
Sentry Commercial Real  
Estate, Services



Angela West, SIOR  
CB Richard Ellis  
Oklahoma



### Moderator

James M. Brown, SIOR  
Hawaii Commercial  
Real Estate, LLC



# How to Use CRM to Build your Business

## 4. Do All Your Contacts Go Into Your Database?

- a. Is your database your main data source for mailings?
- b. When does a contact get added to your database?

## 5. Multi-User Environment – Efficiency, Collaboration

- a. “Nearly half of all records across multiple contact databases are ‘commodity information’”  
Rob Cain, RE Applications
- b. Eliminate Duplication of entry & updating
- c. Reduced Costs of Marketing (data entry, printing, postage)
- d. Brokers can concentrate on building relationships

## 6. Using Calendar, Notes & History Information to Build Relationships

- a. Are you linking your calendar to your contacts?
- b. Using linked information to create listing status reports
- c. Using calendar, notes and histories to collaborate
- d. Using calendar, notes and histories to award referrals and resolve broker disagreements
- e. What information do you attach to your contacts?

## 7. Sales Opportunities – Pipeline Tracking

- a. Master To-Do list
- b. Management and training tool for younger agents

## 8. Linking Contact Data with Property Data

## 9. Client Collaboration

