Designing a Customer Relationship Management (CRM) system with the right features is critical to effectively managing your customer relationships and streamlining your sales processes. Here are 15 features and elements that you should consider when selecting and setting up a CRM system:

Remember, there is no simple solution to a complex problem.

1. User-Friendly Interface:

The CRM should be intuitive and easy to navigate to encourage users to make the most of its functionalities.

1. Integration with Existing Systems:

Make sure the CRM can integrate well with your current systems such as email clients, calendar apps, and texting systems to ensure a seamless workflow.

1. Contact Management:

Centralized database to manage and store customer details, including their sales histories, communication records, and preferences.

1. Lead Management:

Track potential customers (leads) and their status in the sales pipeline to manage and prioritize sales efforts efficiently.

1. Document Management:

Functionality to store, manage, and easily retrieve necessary documents such as contract agreements, addendums, customer identification, and supporting documents.

1. Task Management and Automation:

Create, assign, and track tasks, and automate repetitive tasks to save time and avoid manual errors.

1. Reporting and Analytics:

Analyze data to generate insights into your client portfolio, customer behaviors, and business performance.

1. Communication Tracking:

Log communication history with customers, including emails, calls, and meetings, to maintain a comprehensive view of each relationship. Can you upload all document types?

1. Customization and Scalability:

The ability to tailor the CRM to your specific needs and to scale as your business grows.

1. Compliance Management:

Tools to help you adhere to industry regulations and maintain customer privacy.

1. Mobile Access:

Access to the CRM system via mobile devices to allow for remote work and on-the-go access to necessary information.

1. Collaboration Tools:

Features that facilitate collaboration among your team members, including shared calendars, task assignments, and note-sharing.

1. Marketing Automation:

Automate marketing processes such as email campaigns to nurture leads and retain customers.

1. Feedback and Survey Tools:

Collect and analyze customer feedback to improve your services and understand customer satisfaction levels.

1. Training and Support:

Vendor-provided training and ongoing support to help you make the most of your CRM system.

1. Appearance:

Does the communication (email and text) represent you well? Are they professional looking?

When selecting a CRM, also take into consideration the reviews and feedback from other users, particularly those in the real estate industry, to get an understanding of the CRM’s performance and reliability. It might also be beneficial to opt for a CRM that offers a trial period to better evaluate its fit for your business before making a commitment.

When setting up your CRM, make a list of what you want it to accomplish. Don’t find a CRM and say, how can I make it suit my needs. Say, here are my needs, what CRM will solve those needs.

Don’t try to set up your CRM all at once. Divide your business into sections and see where the biggest hole in your business is. Here are different areas a good CRM can help with:

Leads

Prospects

Sales (buyers and sellers) in process

Past Database follow-up

Incubating (can’t buy (or sell) right now)

Referral Partner follow-up

Recruiting

Events

For each of these, do you have your email, text messaging and voicemail series built out? Do you know how many emails at what intervals do you want to send out? How many text messages and at what intervals will go out? How often the phone calls will be, and what the scripts are for each of the calls?