

# How to Assess Your CRM Mobile App Needs



# In this guide, you'll learn how to:

- Improve lead routing to agents and help them win more deals
- Remove the friction created by CRMs for lead management
- Overcome lead management challenges such as low conversion and poor follow-up
- Meet buyers' and sellers' expectations for immediate responses
- Get a playbook on how to drive agent behavior for lead responsiveness

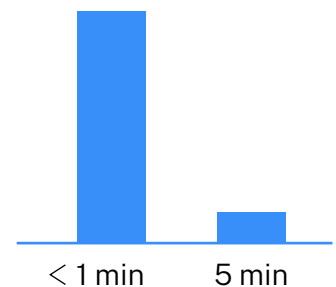
## Introduction



We are at a crossroads. The way we do business is changing before our eyes. We are working from home, attending meetings remotely, signing documents electronically, doing video calls rather than in-person meetings, and even attending virtual events and tradeshows.

What does this mean for your business? In a word: adaptation. Adapting to change is part of running a successful business. Regardless of the headwinds we face, we always pivot, adapt and thrive.

As our businesses adapt to change, we find ways to be more productive, more stable, more successful.



**10x**  
conversion rate if responding to lead within 5 minutes

## What does this change look like today?

Digital behavior is driving sales.

Online buying activity is not new. What is new is the increase in demand for rapid response via online engagement. Where a lead may have called your office or stopped in to book an appointment with an agent, they're now filling out a lead form on your website and expecting a phone call as soon as they hit 'submit'.

If you can connect leads to agents quickly without requiring them to meet face to face, you will win the business.

### So, ask yourself these three questions:

- Do I have a brokerage CRM that works for my real estate business?
- If so, does my current CRM allow me to effectively route leads to different areas of my business (agents, mortgage reps, title insurance, home services, etc.)?
- Does my brokerage CRM also make it easy for agents to interact and respond to leads quickly?

Having a CRM that allows you to effectively manage lead routing and track agent response time is important. Here's why..

**78% of customers  
buy from the first company that responds  
to their inquiry**

Source: Lead Connect

## State of the industry

### Consumer traffic

- On average, buyers search on their own for a new home for three weeks before contacting a real estate agent.
- 75% of sellers sell their home with the first agent they interview.
- Lead follow-up time directly impacts conversion rate.

Consumer behavior has changed. Home buyers and sellers are spending more time doing the work themselves before choosing the real estate brokerage and agent they'll work with to close the deal. And, once they submit a web form to contact an agent, they expect a fast response and a personalized experience from the start, or they'll move on to their next choice.

### Agent behavior

- Realtors earning \$100,000 or more in gross commission income are more than twice as likely to use advanced technology tools like a CRM than agents who earn less.

Learning new technology can be challenging, especially while managing a business.

The importance of having the right technology in place and encouraging your agents to adopt that technology can be the difference-maker for your business.

## Operational needs

- 45% of brokers report that “keeping up with technology” is the biggest challenge their agents face.
- Margins are tight for residential real estate brokerages. Broker/owners need solutions to manage different brokerage services, such as mortgage, title, etc.

Just as important as it is for the agents to leverage the top technology to better service their buyers and sellers, broker/owners need to support their business and agents the same way.

Source: National Association of Realtors, Real Estate Agent U, and Contactually.

*The right CRM can transform lead capture, improve performance and drive results for your business. By implementing a customizable brokerage CRM that can handle your specific lead routing needs AND offers a mobile app designed specifically for on-the-go agent use, you simplify the process for your agents and help them grow their business, too.*

**Today, a lead is  
10x more likely  
to convert if responded to within 5 minutes.**

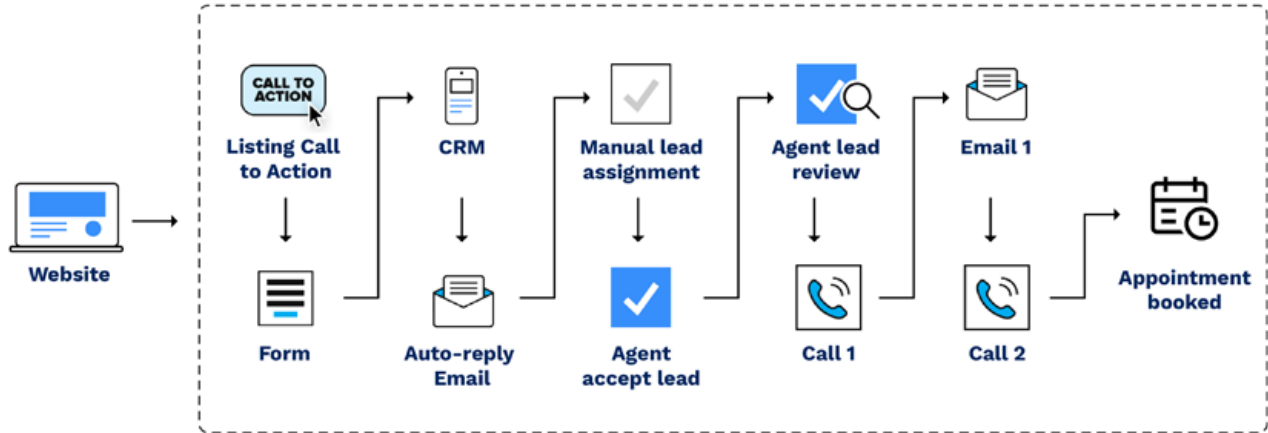
**AND**

**Nearly 41% of salespeople  
say their phone is the most effective sales  
tool at their disposal.**

Sources: Drift & Mark Wayshak

Now, imagine if 100% of your agents had access to a CRM mobile app designed specifically for real estate office needs that enabled them to quickly respond to leads!

## Traditional lead processes are built for **later.**



Traditionally, we've all known the lead handling process to be prolonged and arduous with forms, links, maybe even manual lead assignment, multiple steps for both the admins and agents, and even WORSE, hours to days of delay for the consumer.

## Results

### LOW CONVERSION



US Marketers spent  
**\$5.12B**  
 in digital advertising last year even though the average landing page only converts  
**2.3%**  
 of visitors.

### NO FOLLOW-UP



**58%**  
 of leads are not effectively responded to.

### MISSED OPPORTUNITIES



**10x**  
 conversion rate if responding to lead within 5 minutes

The result of this dated lead process is money spent, no follow-up, and missed opportunity – time and money lost from your business and your agents' bottom line.

Source: Drift

In today's climate, consumers expect a response right now. In most cases, they're already on their tablet or mobile phone when they complete their search so once they hit 'submit', they expect a near-instant reply.

# So, how do you connect leads to agents as quickly as possible?

## Remove the friction between initial interest from the buyer/seller and agent follow-up.

### How do you remove the friction?

With a seamless CRM mobile app that connects the lead to the agent immediately, without all the automated steps in between.

The right CRM will allow your agents to accept a lead, learn about their real estate preferences, and follow up with the lead all within 5 minutes from their mobile device.

As the broker admin, you can set the parameters that you expect your agents to follow. From lead acceptance timing to lead routing rules – the power is in your hands.

And it gets better... the complex lead routing rules or ROI reporting you may need out of your CRM can happen too. The CRM mobile app is simply a connector – the vehicle that gets the lead to the agent FAST, with a gamified experience to ensure the agent knows what to do, remains engaged, and completes the required actions in minutes, not hours. No training needed!

With the right CRM mobile app, your leads will get connected to agents immediately, so your agents can start the conversation right away! When a lead comes in from a form submission, a listing call to action, or even a chatbot on one of your websites, the game is to get the lead to a live agent as quickly as possible and then reward the fast-acting agent with the business! It's all about a positive experience with your brand – for the consumer and the agent.

## Remove Friction By Having A Conversation



Frictionless: designed for RIGHT NOW responses.

Source: Drift

**The Constellation1 CRM Mobile App notifies your agents when a new lead comes in. The steps are simple and efficient, helping your agents be more productive and responsive:**

Once notified, the agent simply accepts or declines the lead within the predetermined lead acceptance time.

Once the lead is accepted, the lead profile is visible, and the agent can then personalize their follow up and begin the conversation.

Within the app, the agent has direct access to add and update lead information and interaction notes.

The agent is then scored on their lead follow up, empowering managers and brokers with key performance metrics for their business.



Leading marketing and tech companies analyze and study the impact of response rates and experience on leads. These are lessons to be learned for all of us in the real estate space. Serving the consumer is the end game, regardless of your market or offering. Drift, a leader in website chat, calls this Frictionless Sales, and they are right!

*Yes, it is important to have the operational back-end of a robust CRM but don't let the CRM get in the way of the customer's expectations for a response RIGHT NOW: remove the friction.*

“ **The strength of the new Constellation1 Lead Routing and Management app landed them as top contenders in the Tech 500, published at Real Estate Almanac.** ”

Jack Miller, President, T3 Sixty

# Checklist

## 13 Important Questions to Ask Yourself About Your Current CRM and Lead Routing Needs

Take time this week to mark down your answers. Then, use the outcomes to challenge your current CRM setup. Remember, nothing changes, if nothing changes. Pivot, adapt, thrive.

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1. Do you want leads from agent listings to go to the listing agent?

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2. Do you have services to manage leads for more than just real estate listings? I.e. Mortgage, Title, Home Services?

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2a. If yes, list them.

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3. Do you have a luxury team?

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4. Are there specific agents who work as property managers in the rental market?

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5. Do you have an “e-team”?

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6. Are you using custom forms?

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6a. If so, what information are you trying to collect from leads?

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7. Do your agents work in specific geographic regions?

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8. Do you need to handle relocation leads?

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9. Is your current CRM well-adopted by your agents?

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9a. If no, why do you think that is?

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10. Does your CRM offer an intuitive CRM app designed for agent responsiveness?

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11. Do you have insights into the lead handling statistics or key performance indicators (KPIs) for your office(s)?

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11a. If yes, is it enough data for you to see how you can take action to improve processes or coach agents?

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12. How many leads does your office generate?

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12a. Of those leads, do you know how many are followed-up on?

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12b. Of those leads, do you know how many are missed?

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12c. Of those leads, do you know how long it takes an agent to respond to the lead inquiry?

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13. Has an agent ever suggested “the office doesn’t help me with leads” or “the office doesn’t give me good leads”?

Turn your **“no” or “unknown” responses**  
into **“YES”!**

**We offer free advice at any time!**

The Constellation1 Implementation and Account Management teams know CRM configuration best practices, lead routing, and agent behavior.

**Interested in a call with an expert?**

**Book a Call with an Expert Today**