



For Real Estate Professionals

# LOOKING AT REAL ESTATE CRM SOFTWARE?

Here are 21 questions to help you  
find the best Real Estate CRM  
software company.

### For Real Estate Professionals

## 21 questions to ask when evaluating Real Estate CRM software companies.

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1. Who at your company has a background in the real estate/new home sales?
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2. How is your software unique to real estate/new home sales?
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3. Do you use your own software?
- 
4. Do you offer features to manage, qualify, and book appointments for online leads?
- 
5. What is your setup or on-boarding process?
- 
6. Do you interface with top real estate/new home sale lead generation websites?
- 
7. Does your software offer the ability to send targeted emails?
- 
8. Is the software and data available from anywhere on any device?
- 
9. How is my data protected?
- 
10. Do you share or sell my data with anyone or any company outside of your organization?
- 
11. If I choose to cancel, what is your cancellation policy?
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12. Does the software capture and organize leads from my website and chat?

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13. What is your training policy?

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14. What are your support policies?

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15. Does your software come with sample content and workflows?

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16. During the on-boarding process, do you clean, dedupe, and scrub my data?

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17. How often do you release major or minor enhancements?

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18. How do you handle customizations?

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19. How many years have you been in business?

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20. How many customers do you have that are similar to us?

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21. How do you charge for your services?

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## Q1. Who at your company has a background in the real estate/new home sales?

- Did they provide **names, credentials, and experiences** in real estate?

### Why does this question matter?

Do they really understand your challenges? At a minimum, this helps you create a connection to the company. A way to discuss issues that may or may not be software related.

More importantly, this is an indicator that they understand you. They understand your typical day and the challenges you face. With this understanding, they'll work harder on creating functional software. Software that's geared to be effective and solve the problems they experienced themselves.

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## Q2. How is your software unique to real estate/new home sales?

- Did they provide a **list of features and capabilities for real estate**?

### Why does this question matter?

In other words, is the software truly built for real estate or new home sales?

A true Real Estate CRM system will be built from the ground up to help you. You'll be able to identify this by the features they offer for your industry. Additionally, you should recognize the platform already using real estate terminology without needing added customizations. This is important because it'll be easier to learn and it'll be easier for your team to adopt the new software.

### Q3. Do you use your own software.

Did they answer with a commanding **yes**?

#### Why does this question matter?

For a company to really understand the user experience, they need to be a user. By their team using it daily, they'll be more proactive on addressing bug fixes and user experience issues.

Additionally, this shows the software they're recommending is powerful enough for their own use. If your software provider is an expert and they don't use their own software, what does that tell you about their own product offering?

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### Q4. Do you offer features to collect, manage, qualify, and book appointments for online leads?

Did they answer with a commanding **yes**?

#### Why does this question matter?

Over 90% of all real estate transactions start with an online search.

To manage the large volume of online leads, it's recommended that every successful real estate agent employ a solution to manage and nurture the plethora of leads that may be coming your way through your website, and other online lead sources, such as Zillow, Realtor.com, NewHomeSource.com, online chat, social media, and more.

## Q5. What is your set-up or on-boarding process?

- Did they provide a **structured, outlined, and documented** approach?

### Why does this question matter?

The sooner you're on-boarded, the sooner you can experience a positive return-on-investment.

The team should be proactive on helping you get on-boarded and setup. If they're expecting you to do most of the work, this is an indicator that it'll be a slow set-up. Additionally, it's an indicator their training and support is not a top priority.

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## Q6. Do you interface with top real estate/new home sale lead generation websites?

- Did they answer with a commanding **yes**?

### Why does this question matter?

As mentioned before, collecting information from your online traffic is important, but that can be difficult with all of the real estate lead generation websites in existence.

Make sure the Real Estate CRM integrates with popular lead generation websites, such as Zillow, BDX, Realtor.com, New Home Source, and MLS. These integrations will ensure all of your contact information is being uploaded into one location. Additionally, it'll make it easier to immediately respond to those leads with automated email responses. These automated email responses will help you demonstrate professionalism and responsiveness to each lead you receive.

## **Q7. Does your software offer the ability to send targeted emails?**

Did they answer with a commanding **yes**?

### **Why does this question matter?**

This question is important because each real estate agents are constantly communicating with prospects, home owners, and other Realtors. If your software can send targeted emails, you'll be able to quickly communicate new available homes, buyer incentives, and promotions, such as grand openings, open houses, and Realtor events to large groups, all at the same time. This feature alone will save you hours each week and help you sell more homes.

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## **Q8. Is the software and data available from anywhere on any cellular-enabled device?**

Did they answer with a commanding **yes**?

### **Why does this question matter?**

Real estate professionals are rarely in their office. Most commonly, they're out driving to different appointments.

If the software is available anywhere, you'll be able to access and update your information and data between appointments. Not only will this increase your own detailed notes and data, but it will increase communication and collaboration between your team/co-workers, if you have them.

## Q9. How is my data protected?

- Did they provide a **detailed and documented** approach to data protection?

### Why does this question matter?

Many software providers will collect sensitive information from you. Additionally, many will store your client's information too.

Be prepared to ask your software provider how they protect your data against hackers. What would happen in the event of a system failure. How often your data is backed-up and where it's placed.

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## Q10. Do you share or sell our data with anyone or any company outside of your organization?

- Did they answer with a commanding **no**?

### Why does this question matter?

Unfortunately, sharing and selling data is more common than you think. However, each organization must explain how they'll use your data in their privacy policy and their terms of service.

With that being said, verify they have some sort of privacy policy and terms of services. This is something that is commonly offered on their website. If you feel uncertain about the answer you receive, you have every right to review these terms personally or have them walk you through it.



## Q11. If I choose to cancel, what is the cancellation policy?

- Did they provide you with a **detailed and documented** cancellation policy?

### Why does this question matter?

With any product and service, sometimes it just doesn't work for you. This can be caused by a variety of reasons - some avoidable - some not.

It's important that you receive a detailed explanation in the event of a cancellation. Do you get a full refund within 30-days? Do you get a full refund within 60-days? How do we go about the cancellation process? Will they make you jump through multiple hoops to cancel? Make sure the software provider gives you a detailed and documented response.

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## Q12. Does the software capture and organize leads from my website and chat?

- Did they answer with a commanding **yes**?

### Why does this question matter?

Whenever a buyer reaches out to your website directly, there is a high chance they're ready to buy. It's important to respond to these potential home buyers quickly before they start looking elsewhere.

When your CRM is connected to your website, you'll receive automated alerts directly to your cellular device that a new lead has arrived. This gives you the opportunity to respond to each lead as soon as they arrive. By responding this quickly, you now have the advantage to quickly qualify or disqualify each lead that comes in, helping you focus your time and energy on your best leads.

### Q13. What is your training policy?

- Did they provide you with **detailed and document** training options?

#### Why does this question matter?

You and your team will need training to learn the new software system and its features. This will take multiple training sessions to cover all of the topics. Additionally, training sessions can quickly grow if you add new members to your team.

The training you receive can be conducted live online, through recordings, and/or onsite. With these multiple options, be sure to ask the software provider which trainings come at a cost and which ones come at no cost. However, you should expect to get some form of training without paying for it. Lastly, don't forget to ask how often training is offered. You should expect training offered a couple days each week.

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### Q14. What are your support policies?

- Did they provide a **detailed and documented** approach to support?

#### Why does this question matter?

Any form of software or technology will experience some issues. However, it's important for your software provider to offer detailed options in the event of a failure.

At a minimum, you should expect email support and phone support offered during business hours. Be sure to ask them for turnaround time based on priority. For example, a response to a critical issue should be within two hours, important issues within one day, and moderate issues should be within 48 hours. Don't forget to ask how you can escalate if you're not happy with the support.

## Q15. Does your software come with sample content and workflows?

Did they answer with a commanding **yes**?

### Why does this question matter?

Getting started with a new CRM can be a challenge. Additionally, it can be even more of a challenge if you have to start from scratch with new content, templates, and workflows.

By starting with sample content, templates, and workflows, you can start using the sales and marketing tools after a few training sessions. This gives you the advantage of learning and using the software quickly, which leads to improved technology adoption and a much quicker return on investment from your new software purchase.

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## Q16. During the on-boarding process, do you clean, remove duplicate contacts, and scrub my data?

Did they answer with a commanding **yes**?

### Why does this question matter?

Any major transfer of data and information is the perfect time to clean and consolidate your data.

To increase your chances of success with the software, the software provider should offer data scrubbing as part of the on-boarding process. This will help guarantee the information in the system is accurate and any future additions of data will be built on a solid foundation.

## Q17. How often do you release major and minor enhancements?

- Did they provide a **detailed and documented** approach to enhancements?

### Why does this question matter?

A company should release major enhancements once a quarter and minor enhancements every six weeks, at a minimum. If they're not, it's a sign they're not proactive on improving the software and more importantly, not listening to their customers. A subscription-based software should provide minor enhancements at no charge. Major enhancements should only be charged to you if they add new functionality that adds tangible value specific to your business.

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## Q18. How do you handle customizations?

- Did they provide a **detailed and documented** approach to customizations?

### Why does this question matter?

You shouldn't expect every piece of software to fit your needs perfectly out of the box. It's extremely common for software to require customizations to fit your specific needs.

For any real estate software, you should expect some degree of customization. For many of you, this can come in the form of custom reports and dashboards. Be sure to discuss the process of adding customizations to your account. How long do these customizations usually take and how much do they typically cost? This will help you plan accordingly.

## Q19. How many years have you been in business?

- Did they tell you their **company story**?

### Why does this question matter?

Multiple years of experience in the industry can show how much they've grown. It's an indication that they've learned to adapt and the software has continued to be helpful for many years in a competitive industry.

Be sure to listen to their story and why they became a business. No one wants to work with a software company that's just around to make money.

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## Q20. How many customers do you have that are similar to us?

- Were they able to share **customer examples**?

### Why does this question matter?

Every real estate professional experiences unique daily challenges. Reviewing a client list can help prove the software is designed to help you and your business.

Don't be afraid to ask how the software has been developed to help you specifically. It may not have every feature you need, but it will show they are making an active effort to continually improve the software to address your specific needs and wants.

## Q21. How do you charge for your service?

Did they provide a **documented** approach to pricing?

### Why does this question matter?

Congratulations! You've asked some critical questions to help learn more about this specific software provider. Now we come down to how this software provider will charge for their products and services.

The first question to ask is if they charge annually or monthly for their software. For many subscription-based businesses, you can expect a per user per month charge. Additionally, this is the time for them to explain their policy in the event of a price increase.

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## Conclusion

It's our hope that the questions above will help you find the best real estate CRM software company. Each software company is structured differently and offers slightly different products and services, but they should be able to answer these questions quickly and easily.

If you have any additional questions or need any additional explanations, please contact our team for assistance, we're here to help!

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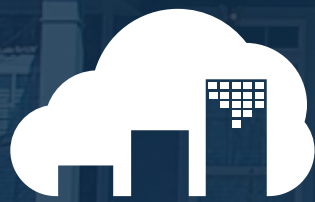
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