

# CRM: Worksheet

Remember, the businesses that will succeed are the business that do the basics well. This means:

- ▶ Following up in a timely manner - answer your customers (and prospective customers) questions every step of the way.
- ▶ Engaging and educating your prospects both before and during a transaction. Remember, relationship before the sale.
- ▶ Consistently asking yourself "how can I deliver more value to my customers?"
- ▶ Become a connector in your community. Introduce people to one another. Continue to provide value. Sooner or letter you'll be known as that great real estate agent who knows everything and everybody.

## To Do:

[ ] Make a list of all of the places that your customers and prospects hang out online. Make it a goal to visit those communities and engage (answer questions, post helpful advice). This might mean engaging with them on social media or it might mean engaging with them on the Q&A section of Trulia Voices for example. Show up daily/weekly.

[ ] Set up your new CRM system (if you don't have one already). You can try Nimble free for 14 days by visiting: <http://www.nimble.com>. Make it a goal to engage with and add at least 5 - 10 new contacts per week.

[ ] Follow up with your previous customers just to say hi and see how they're doing. Ask if there's anything that you can help them with.

[ ] Check in with your current customers. Maybe you have a buyer that's still 6 - 12 months out from making a purchase - ask how you can make them feel more informed (and empowered). What questions can you answer? What resources can you point them to?



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