Real Estate Best Friends

The Real Estate Best Friends process in SalesPartner helps you keep in close contact with your hot buyers and prospect vendors. There are two different approaches to this process in SalesPartner. In the first approach, we set up recurring activity tasks for our Real Estate Best Friends and then use the To Do List to print out phone lists, and update our activity with these clients. This approach allows a lot of flexibility and lets you use different repeat cycles for different clients. An alternate, somewhat simpler approach is to use the Real Estate Best Friends Group. We can then maintain our Real Estate Best Friends from the Contact Database.

Approach 1: Repeating Phone Calls - Using the To Do List

Adding a repeating activity to phone a contact

This process will show you how to add a phone call activity with a repeat cycle. This activity will appear in your **To Do List** and prompt you to contact your client.

First, go to the **Activity** Tab.

Then click the **Add** button to add a new activity record.

Set the activity type as a **Note / Phone call**.

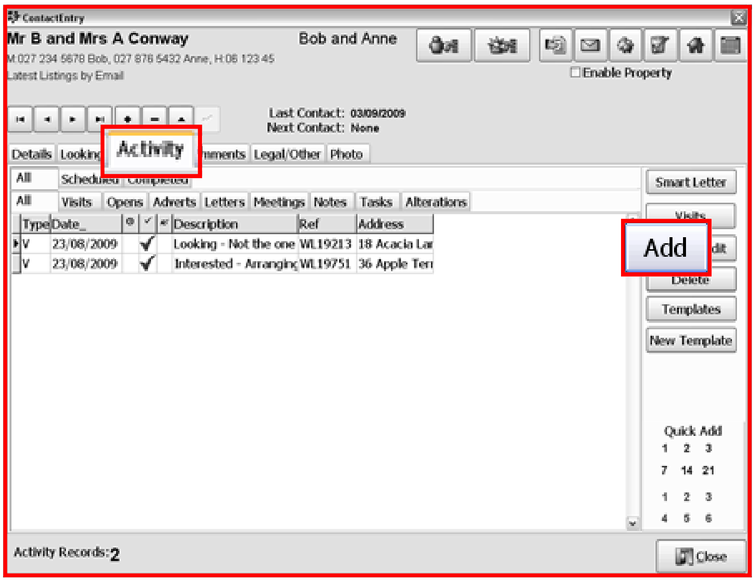
Then set the date of the activity to the next time you intend to contact this client.

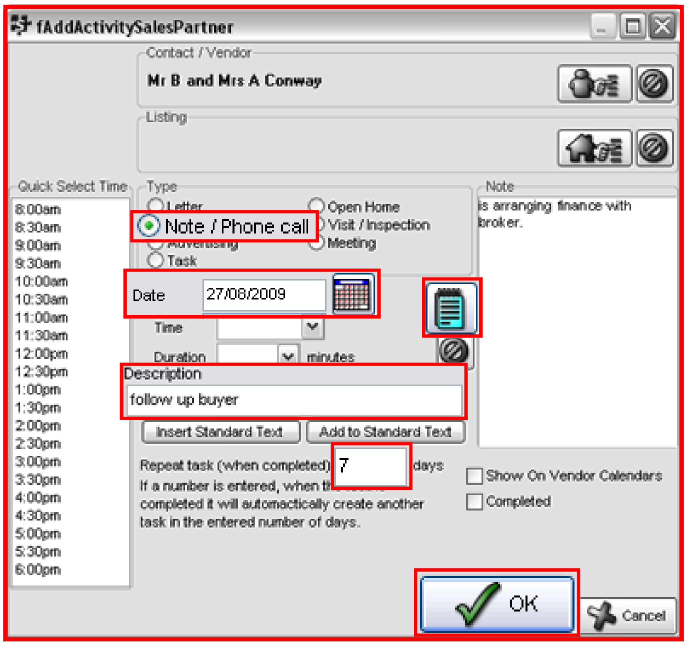
In the **Description** field, you can put in the message, “Follow up buyer”. (Note that you can also use this process for prospect vendors, in which case use the description “follow up listing presentation”)

Use the **Add a Note** button to open up the note field where you can enter in some more information.

Set the **Repeat Task** field to 7 days.

When finished, click **OK**.





Printing a phone list

Now that you have some clients in your Real Estate Best Friends, with **Phone Call Activities** setup for you to call them, you can now go to the **To Do List** and print off a phone list. This list will include all the contacts' details, and will also have details about your recent activity with these clients.

In the **To Do List**, click on **Notes / Phone** to bring up all your scheduled future phone call activities.

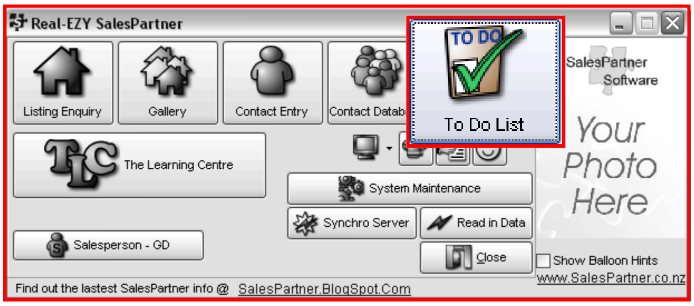
Use the **ALL** button to select all the activity records.

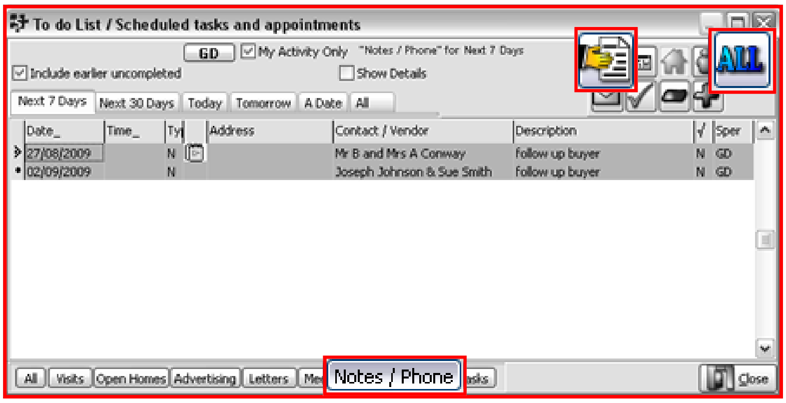
Go to **Reports**, and double-click on the **Contact follow up with activity** report.

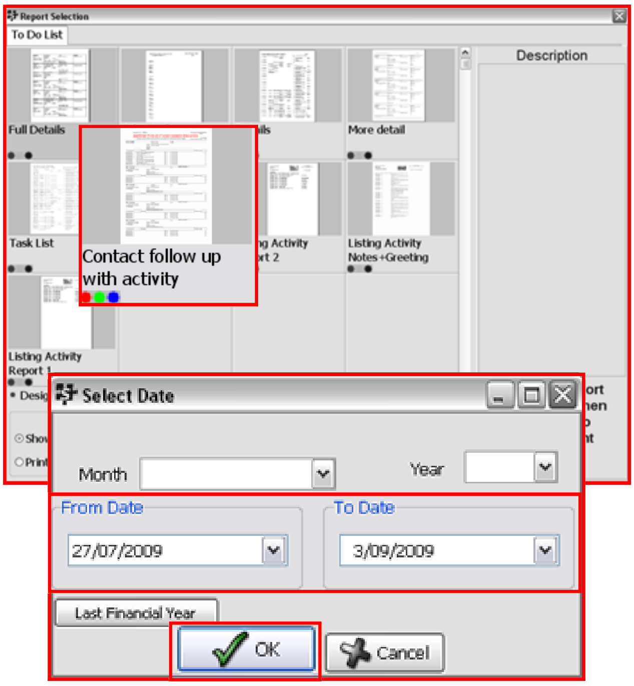
In the **Select Date** window, set the date range from 4 weeks back and 1 week forwards. Then click **OK** to bring up the report.

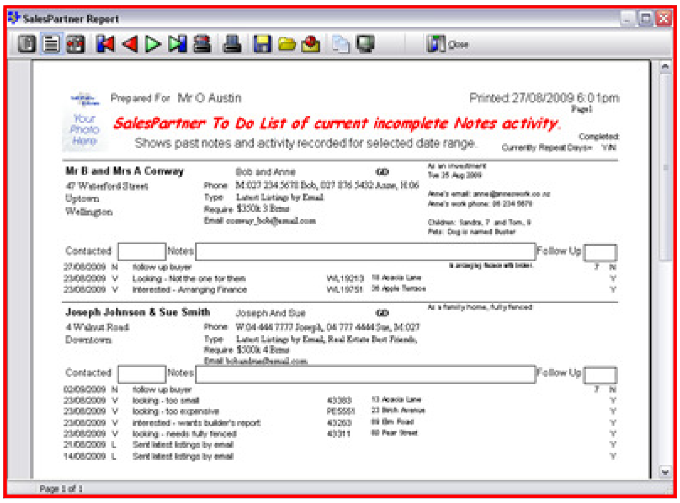
This report contains contact information, including **Looking For** information.

The report will also include all the past activity recorded for each client for the last month, and also all scheduled activity for the following week.









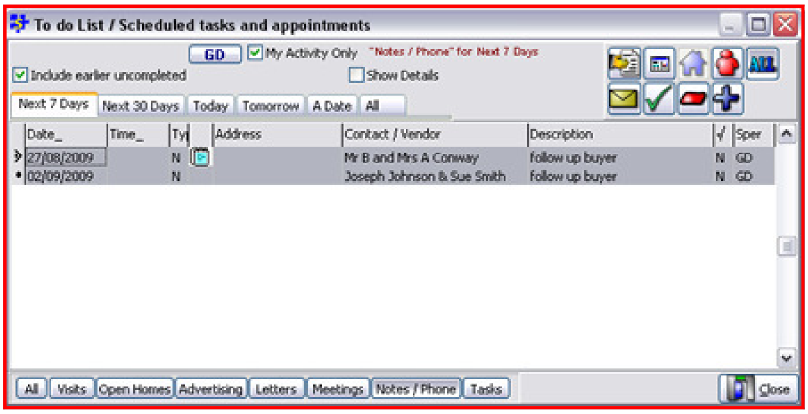
What's next?

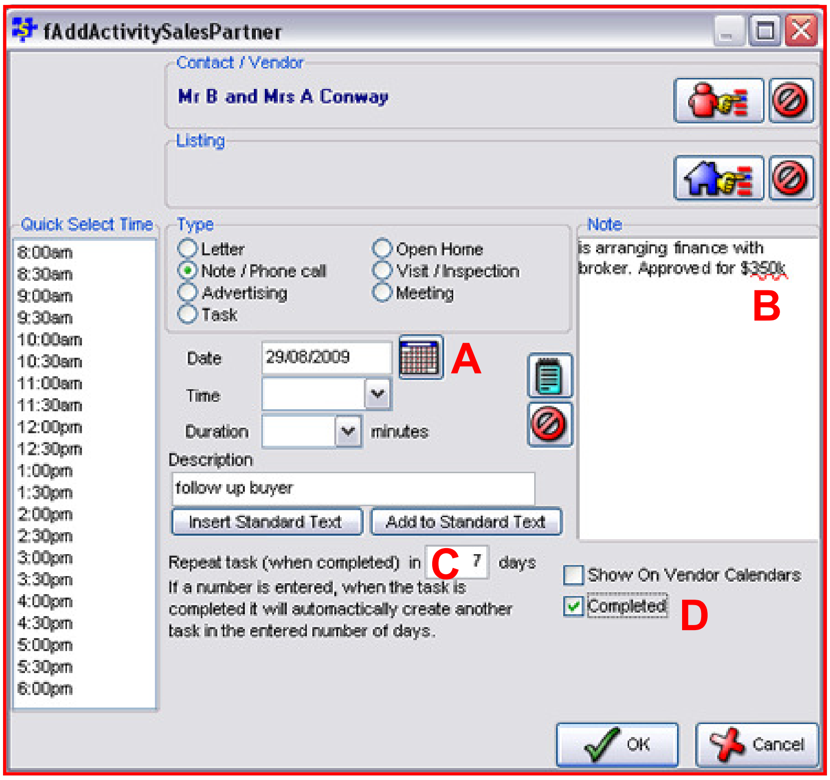
Keep your Phone List with you throughout the week, and as you contact all your clients, take notes on the phone list sheet for you to enter into SalesPartner later (Or alternatively you can make your phone calls while at your computer and enter the details at the same time).

After your phone calls

Back in the **To Do List**. Bring up all your **Notes / Phone Calls** again.

Double click on an activity record to bring up the details of that activity.





[A] First, alter the date of the activity to the actual date that you called your client.

[B] Then, add to your original **Note** to record the new information from your phone call.

[C] You can then either keep the **Repeat Cycle** at 7 days, or you can change it if that is no longer suitable. (i.e. if they've bought a property you would take them off the 7 day cycle)

[D] Tick the **Completed** checkbox. This will set the activity to completed. When there is a repeat cycle, a new activity will be created for the next phone call.

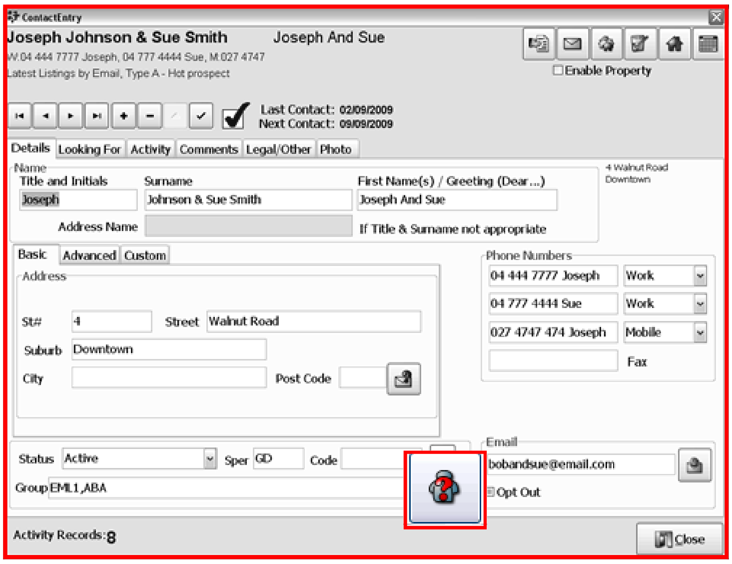
*In this example, we've set the date of the phone call to 29/08/2009, then we've added to our **Note** that our client has been approved for finance up to $350k. We've then kept the **Repeat Cycle** at 7 days, so that we will be prompted to call them again in the next week. After that we've ticked the **Completed** checkbox to indicate that we have completed this phone call.*

Approach 2: The Real Estate Best Friends Group

This approach is somewhat simpler and easier to manage. We'll add our contacts into a Real Estate Best Friends Group, then in the Contact Database, each week we can print out a phone list of our Real Estate Best Friends. As you follow up your contacts, you can then add activity records concerning your discussions.

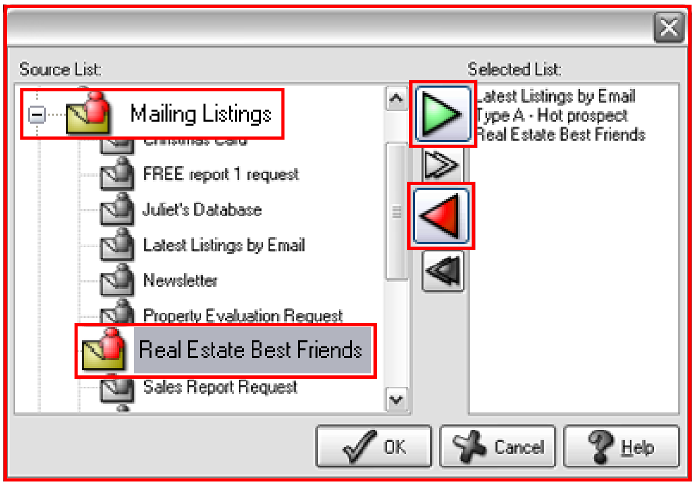
Maintaining your Real Estate Best Friends Group

To manage groups for a contact, click on the **Databasing Groups** button.



In the **Databasing Groups** menu, you can add your client to a Group by finding it in the **Source List** on the left hand side, and then either double-clicking on the Group of highlighting it and clicking on the **Green Arrow**. This will bring the Group onto the right hand side, indicating that the contact is now in this Group.

The **Real Estate Best Friends Group** can be found by clicking on the **Mailing Listings** category.

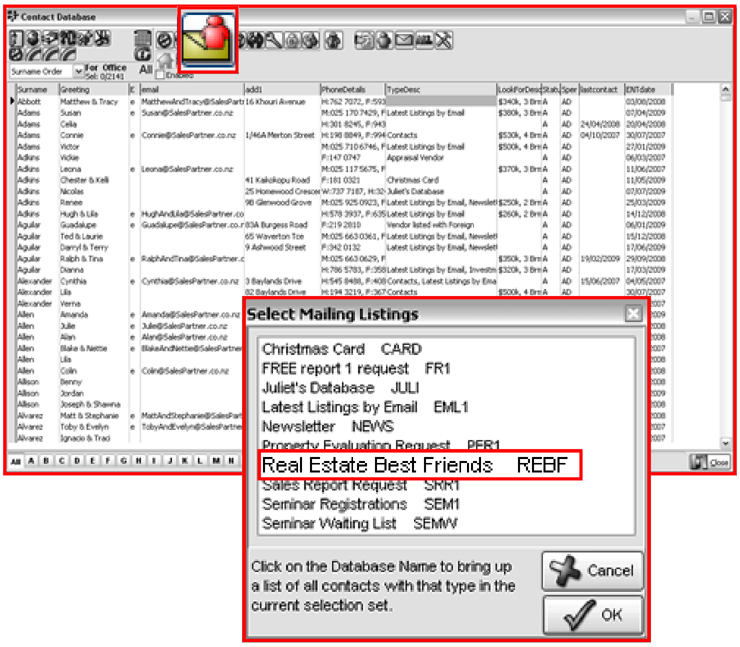


To Remove a contact from a Group, simply highlight the Group on the right hand side, and either double-click or use the **Red Arrow** to remove the contact from that Group.

Selecting your Real Estate Best Friends Group in the Contact Database

In the **Contact Database**, click on the **Mailing Listings** button to bring up the Mailing Listings Groups.

Click on **Real Estate Best Friends** to show only your contacts in your Real Estate Best Friends Group.

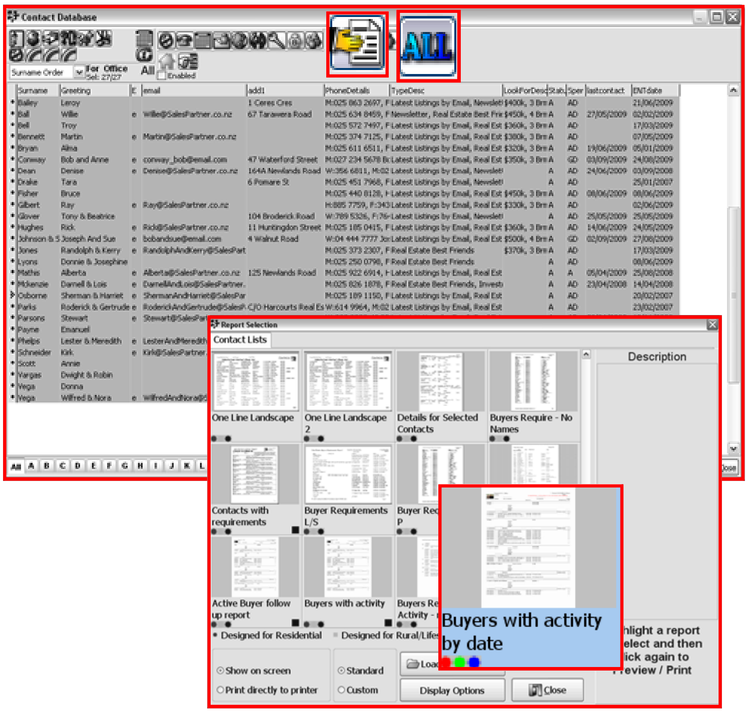


Printing a Phone List from the Contact Database

After you've filtered down your **Contact Database** to show just your Real Estate Best Friends, you can now print a **Phone List** of these clients.

Select all then go to **Print Reports**. In the Reports Menu choose the **Buyers with activity by date** report and set the date range to include the past month and the following week.

This will produce a phone list of all your Real Estate Best Friends including all contact details, looking for details and comments, and all your recent and upcoming activity with these clients.



Adding an Activity Record to a Contact

Keep your phone list with you throughout the week, and after you contact each person, you can add Phone Call Activity records for your contacts in SalesPartner to record details of your conversations.

From the Contact, go to the **Activity** tab and click **Add** to add an activity record.

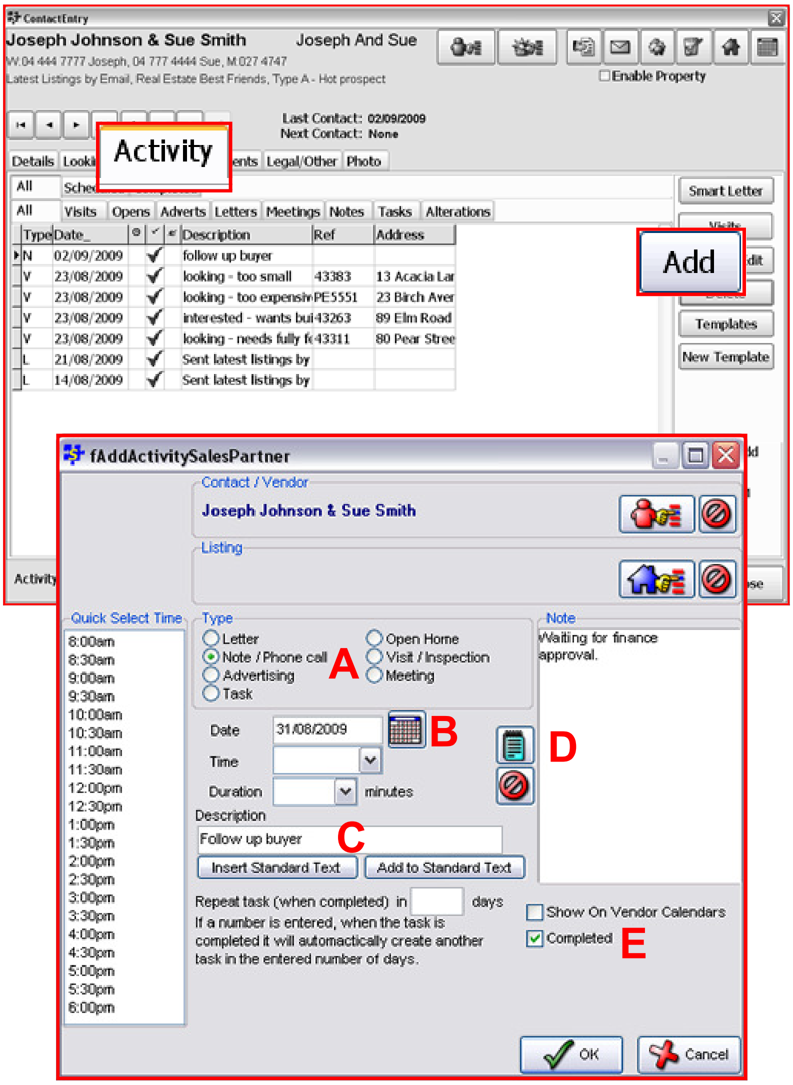
[A] First, set the activity type to **Note / Phone Call**

[B] Then, set the date of the activity to the date that you called the client.

[C] In the description field, write in a short description of the purpose of the phone call.

[D] Add a note to record more information and details about the conversation.

[E] Tick **Completed**, then click **OK**.



SalesPartner Tip:

*The Real Estate Best Friends Process will not only help you to sell more properties, it will also gain you more listings. Your Real Estate Best Friends will appreciate this service and will want the same thing to happen **when they list their house**. You can also print reports of Buyers with Activity to take to listing presentations to demonstrate to prospect vendors that you are actively working with motivated buyers. For more information and ideas contact SalesPartner on 04 4711 849.*