

WHAT NEW BROKERS NEED TO KNOW...

Brought to you by the Indiana REALTORS® Leadership Academy Class of 2018



Getting Organized

Organization can be the steppingstone that makes an average REALTOR® able to be great. One of a broker's major responsibilities is meeting the needs of their client(s); and, being organized allows you to do that at a very high level. Today's technology is constantly evolving to maximize efficiency and nimble task management. Whether you are team Apple or Android, there are many apps available to operate at the top of the game. Whatever tools you choose, be it apps, paper planner, or calendar, be diligent and remember that this is your lifeline. Keeping inventory of client information, meetings, showing times, closings, and so on will make it easier to prioritize your to-do list and complete the important things first.

Always be able to stay on top of your to-do list by utilizing these pointers:

Transaction Management Software

This software is a must-have for every broker, and you need to fully understand it to be successful. Pay close attention to the Tasks tool. It allows you to assign specific tasks to a certain transaction or client on a specific day. Products like Dotloop, zipForms®, or Top Producer will make your transactions look more professional and make them go smoother. These are just a few examples of transaction management software platforms. Remember, this tool can also be essential while working in a team environment.

Brokerage Checklists

Most brokerages will provide their brokers with standard checklists for certain real estate functions. For example, a broker may have a checklist for new listings to ensure they do not miss anything. This sets the office standard. Everyone is on the same page and knows that each file has the must-needed documents. As you go through the transaction, these checklists help make sure no steps were missed and keeps everyone accountable. If your brokerage has not provided this information to you, ask for it.

Customer Relationship Management (CRM) Software

CRM programs are another useful way to stay organized. The last thing you want is to forget about your client base. Make sure they do not forget about you. Lots of great CRM options are available. Find one that feels right for you. Each offers a variety of features. You are sure to find software that checks off everything you need.

Not only is organization an important life skill and discipline, but it is crucial to the financial survival and success of a REALTOR®. You are not alone, though. Feel free to ask your managing broker or a top agent in your office how they handle this part of their business.