Introduction to Prospects CRM

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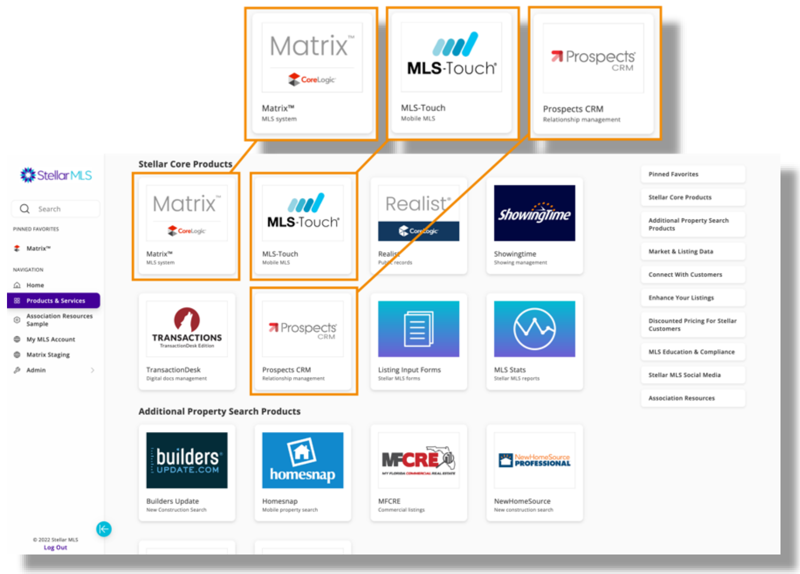
What is a CRM?

CRM stands for **C**ustomer **R**elationship **M**anager and, in general, a CRM brings together different aspects of your business such as contact information, to-do lists, calendar appointments, and reminders, to help you be more organized, build relationships, and stay top-of-mind with everyone in your business.

Where does Prospects CRM fit in with other MLS tools/resources?



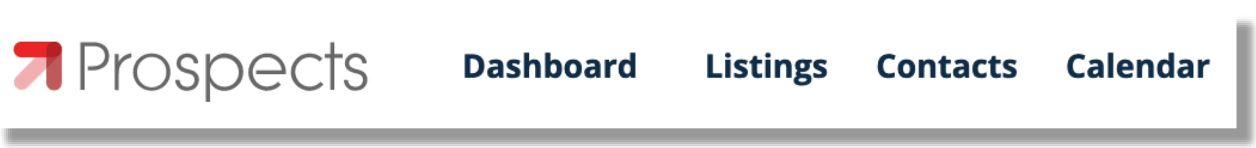
It is the combination of Matrix^{TM}, MLS-Touch®, and Prospects CRM® that create the perfect ecosystem. As a reminder, Matrix is the primary system where you will search for and access the listing data entered into Stellar MLS, MLS-Touch is an application for your smartphone, and Prospects CRM can help manage your contacts and business activities.

And they all work together…

It is important to note that Prospects CRM is unique from other CRM software because it is directly integrated with the MLS system, Matrix, meaning that data can flow between the two systems. This allows access to some incredible functionality such as being able to link contact records to MLS listings, generate market reports, enable drip campaigns, and reference some of the favorites and discards your customers have made within the customer portal OneHome^{TM}.

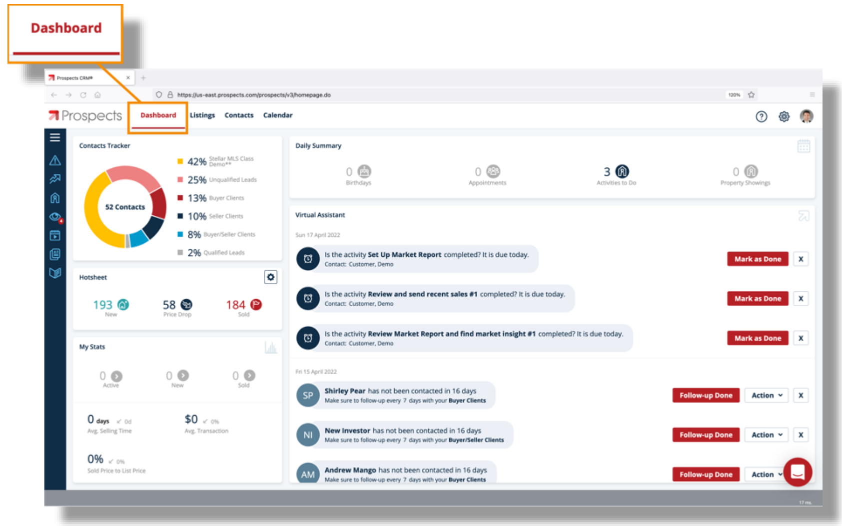
Core Features Overview

Found along the top of the Prospects CRM interface, you will access its four core functions: Dashboard, Listings, Contacts, and Calendar.



DASHBOARD

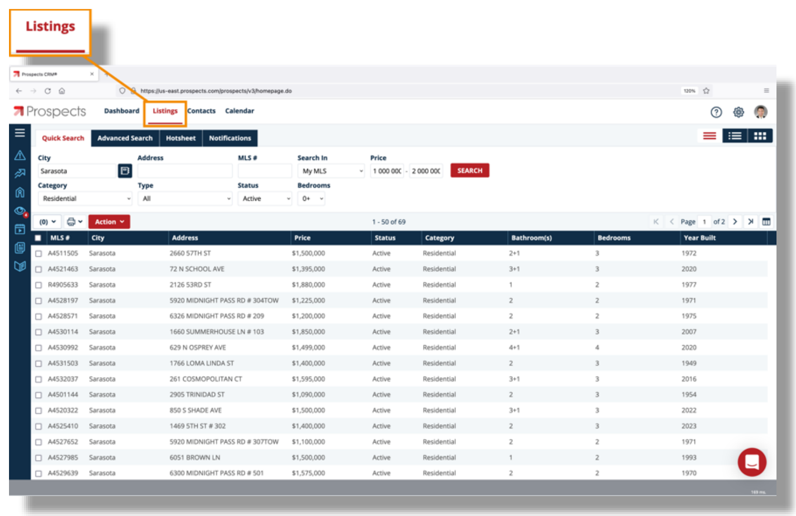
The Dashboard helps you focus on what matters. It acts as your virtual assistant that reminds you of important dates, who you need to follow up with, upcoming appointments, and much more, all at a glance.



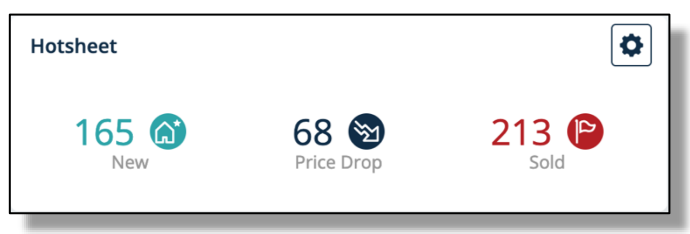
As you use Prospects CRM more and more, the Dashboard will quickly begin to populate with helpful information.

LISTINGS

Because Prospects CRM is integrated with Matrix, you can run basic searches and view listing details directly in the system from a variety of locations including the Listings menu. Being able to access MLS data directly also brings some powerful features.



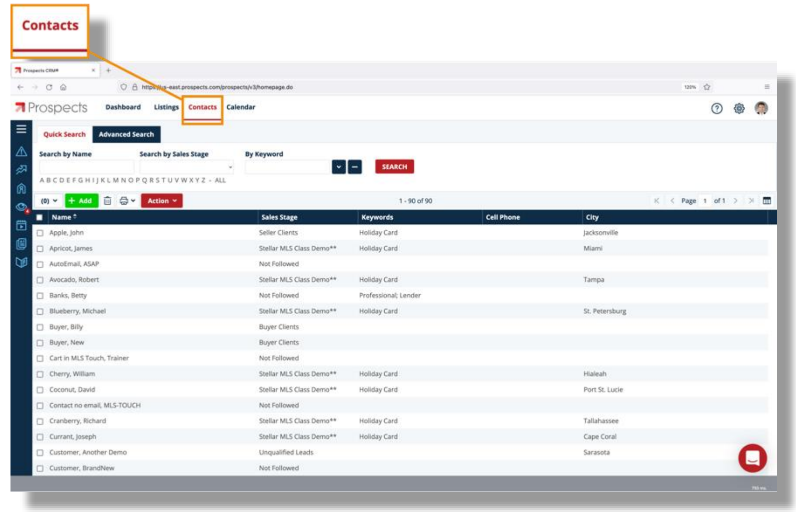
Now if you are asking *Why would I want to access listings here in addition to Matrix?* Consider this: Being able to pull up property listings from the MLS and then associate those listings with one or even multiple contacts will allow Prospects CRM to help become the glue for your transactions!



Also, the integration with Matrix makes it possible to create a Hotsheet and then view listing changes within certain cities over a period of time, right from within Prospects CRM.

CONTACTS

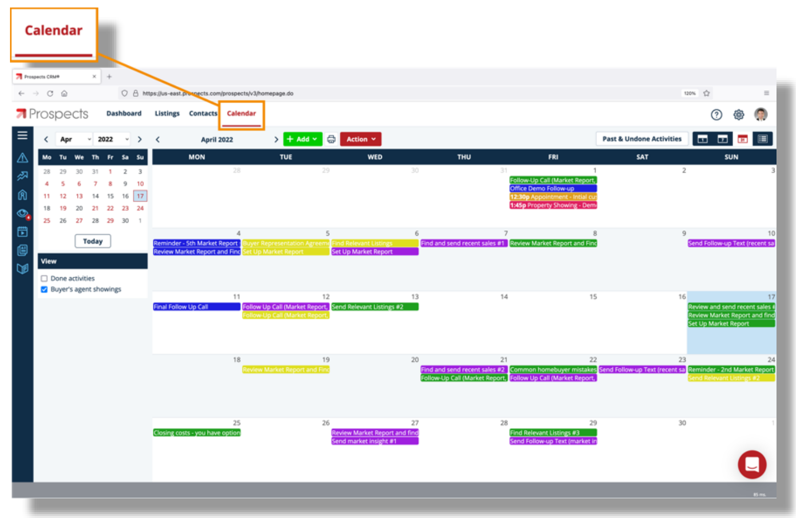
The Contacts section is where you will probably spend most of your time in Prospects CRM. You can easily store and manage contact information for everyone you know – customers, prospects, past acquaintances, lenders, contractors, and other agents. Once a contact is entered, you can then take actions such as scheduling follow-ups, appointments, and to-dos.



CALENDAR

The calendar within Prospects CRM is a fantastic resource and designed for agents.

When you schedule activities such as appointments or to-dos, they too can be linked to MLS listings (and contacts) so that all the information is readily available in one place.

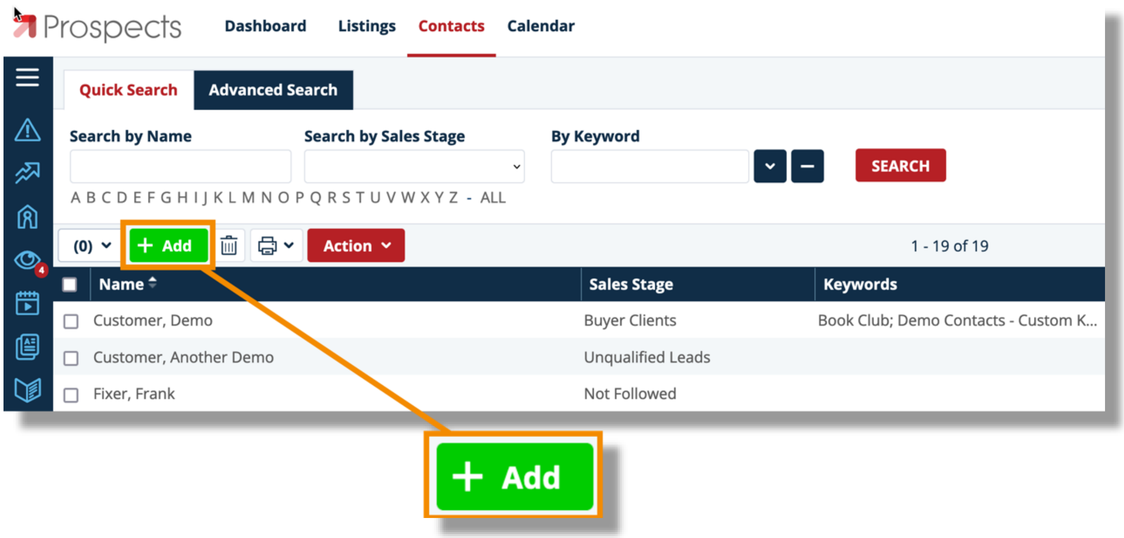


Adding and Editing Contacts

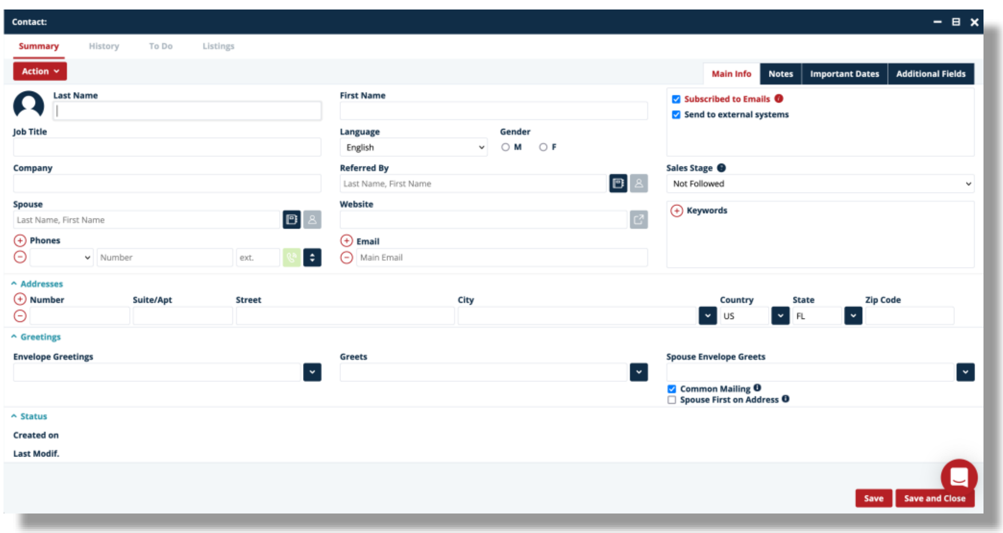
Due to its integration with Matrix, Prospects CRM automatically syncs any contact entered in Matrix automatically. You can also enter contacts into Prospects CRM directly, either one at a time or you can import contacts from a variety of different file formats such as CSV (comma separated values).

To view a list of your contacts, click the Contacts menu button near the top of the screen at any time. The list shown first displays your most recent 20 contacts and then you can search individually by name, click the first letter of the contact last name from alphabet displayed to bring up matching records, or click on ‘All’ to display all contacts.

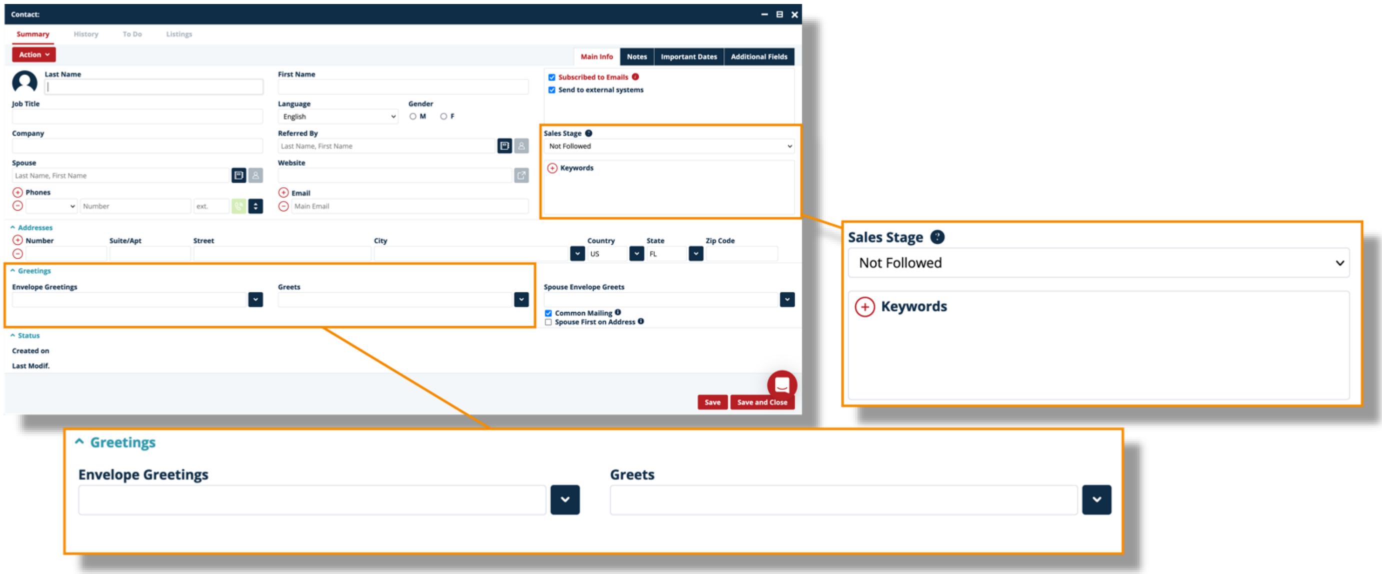
Add a Contact



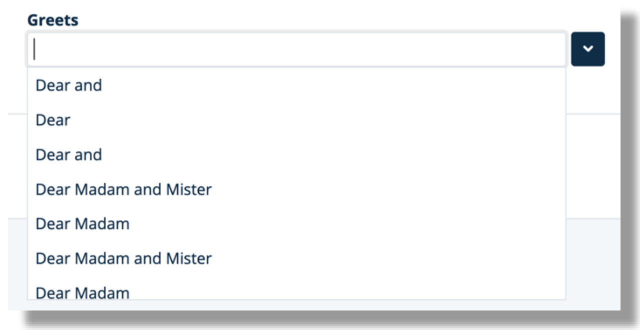
To add an individual contact, click the green "Add" button above the contact list.



Most of the available contact fields will look familiar such as first name, last name, phones, and addresses. To really harness the power of Prospects CRM however, there are a few extra sections that should be noted. These include Greetings, Keywords, and Sales Stage.

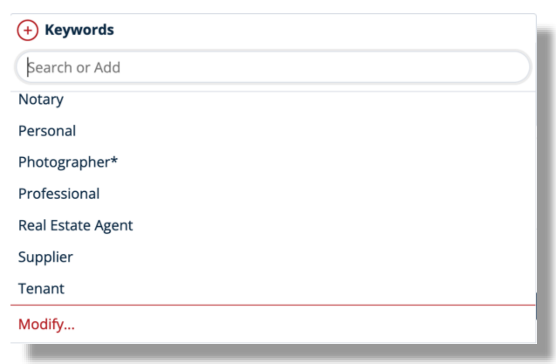


Greetings



This area of the contact entry window contains three options: Envelope Greetings, Greets, and Spouse Envelope Greets. When sending out communications, such as an email, from Prospects CRM using an existing or custom text template (discussed later), you can automatically populate the greeting line of that message with both the greeting as well as the contact's name. There are many pre-defined options to choose from and you can enter your own as well!

Keywords



Being able to to assign keywords to contact records is a great way to group contacts together and then return to them quickly. As with Greetings, Prospects CRM has a large list of pre-defined keywords to choose from and you may add your own by clicking the word 'Modify' at the bottom of the list.

Sales Stage

Catagorizing groups of contacts in Prospects CRM is critical to getting the most out of the system! A Sales Stage is a main category for contacts, such as buyers or sellers, and once assigned, a virtual assistant (shown on the Dashboard) can then prompt you to follow up with each group of contacts on a particular schedule.

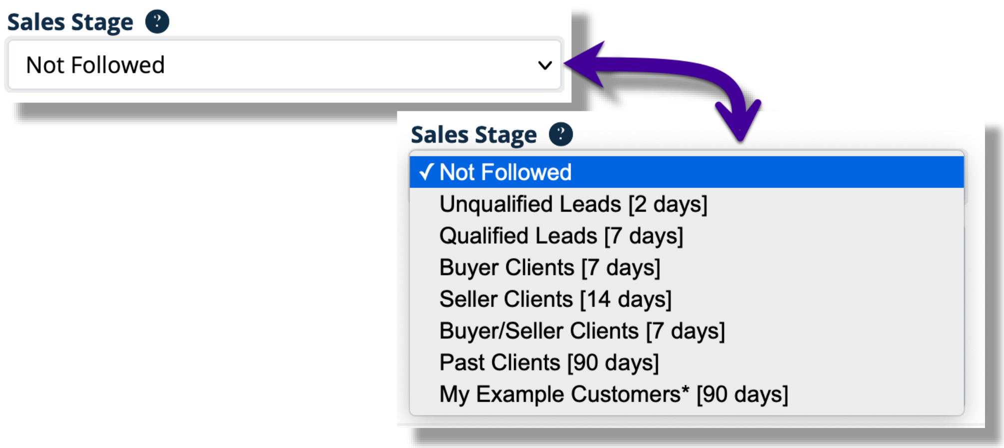
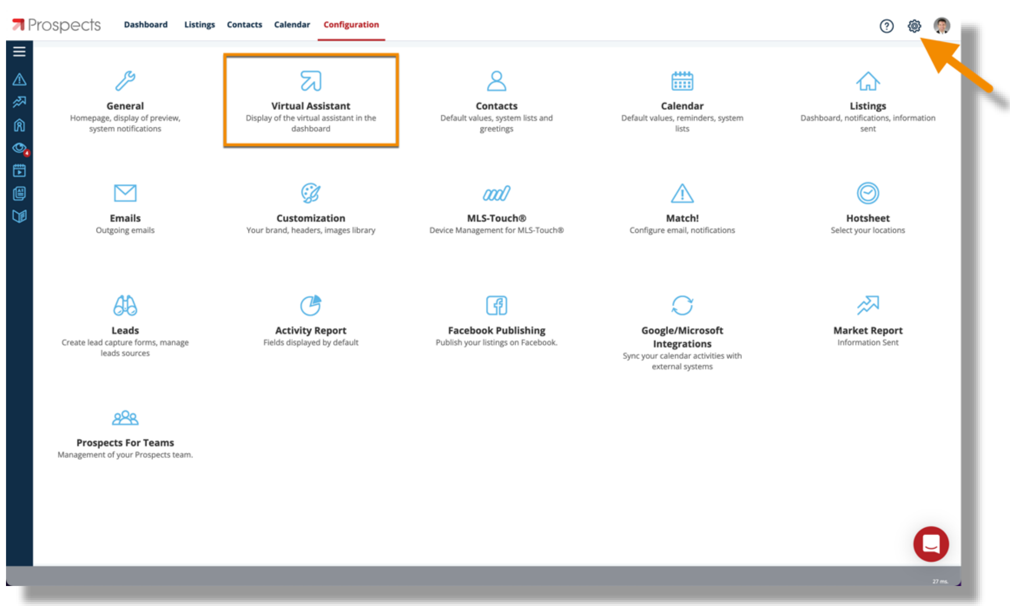


Figure 1

There are eight (8) Sales Stages in Prospects CRM and each can be modified if you wish. Look for the options in the drop down menu within an individual contact record (Figure 1 above) and, if desired, customize them by clicking the gear icon in the upper-right corner of the main display and then Virtual Assistant from the Configuration screen.

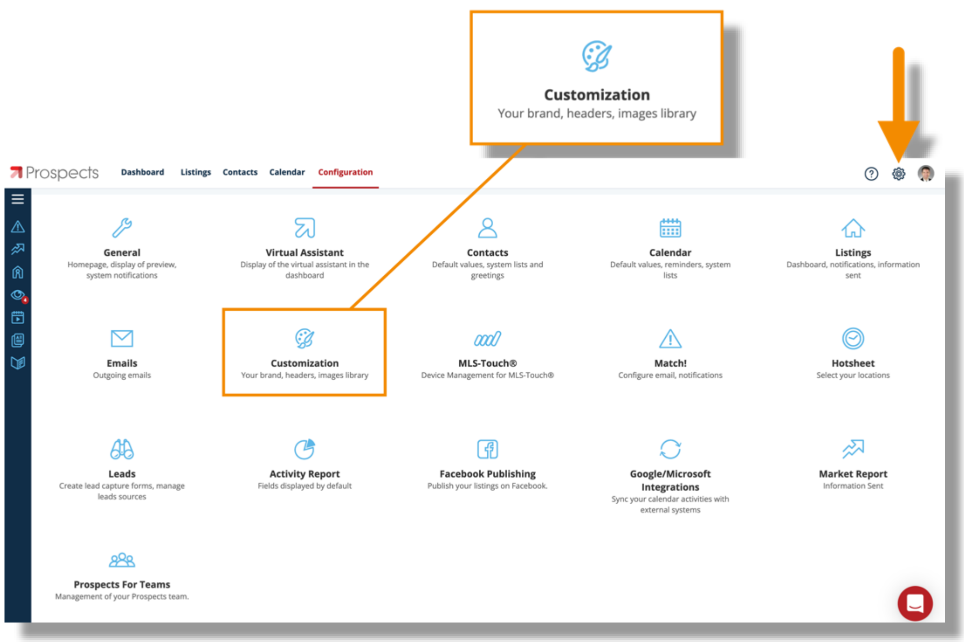


Branding

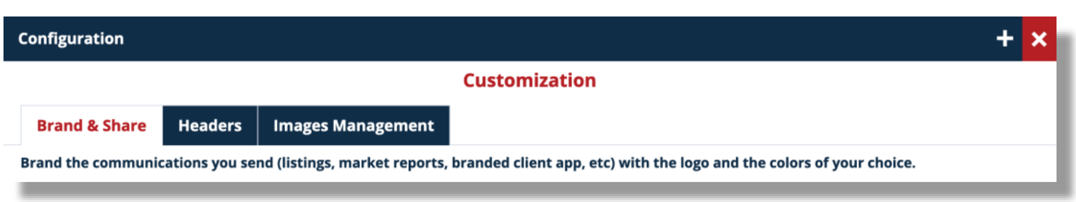
Before sending out communications, reports, and information to your contacts from Prospects CRM, you will want to upload your agent photo and company logo, select your brand colors, and customize your email signature so that everything will be branded to you.

Agent Branding

To begin branding the system, click the the gear icon in the upper-right corner of the main display and then select the Customization section from the Configuration screen.



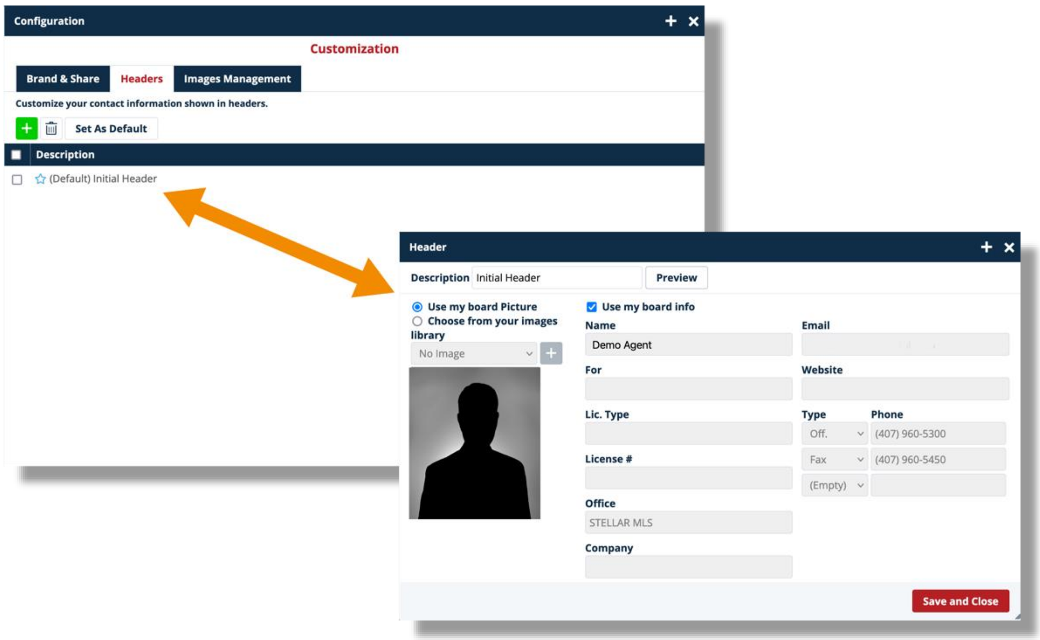
A new pop-up window will appear containing three tabs: Brand & Share, Headers, and Images Management.



Begin with the Images Management tab and upload your agent photo and company logo from your computer by clicking the Choose button and navigating to the location on your computer where the images are stored. Images added to the Prospects CRM

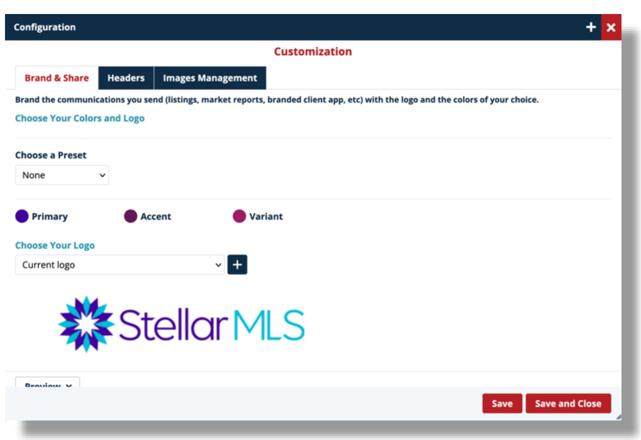
Images Library will then be available throughout the system. Be sure to also choose your main agent photo in the My Agent Picture section by clicking the Modify button!

Next, click the Headers tab and double-click the default entry in the list to verify your contact information.



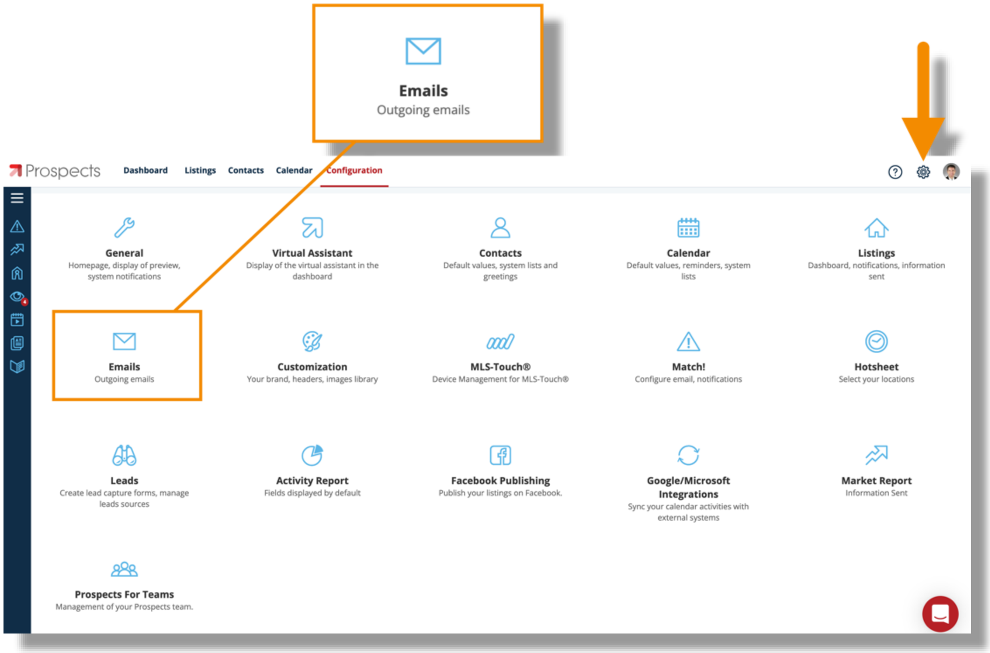
Simply, uncheck the “Use my board info” box should you need to make adjustments to the contact information displayed. Please note that changing the information in Prospects CRM **does not** update your membership record with your local board/association – you would need to contact them directly.

Lastly, click the Brand & Share tab, select your brand colors, and choose your company logo from the drop down menu of those images uploaded earlier on the Images Management tab. Once finished, click the Save and Close button to lock in your changes.

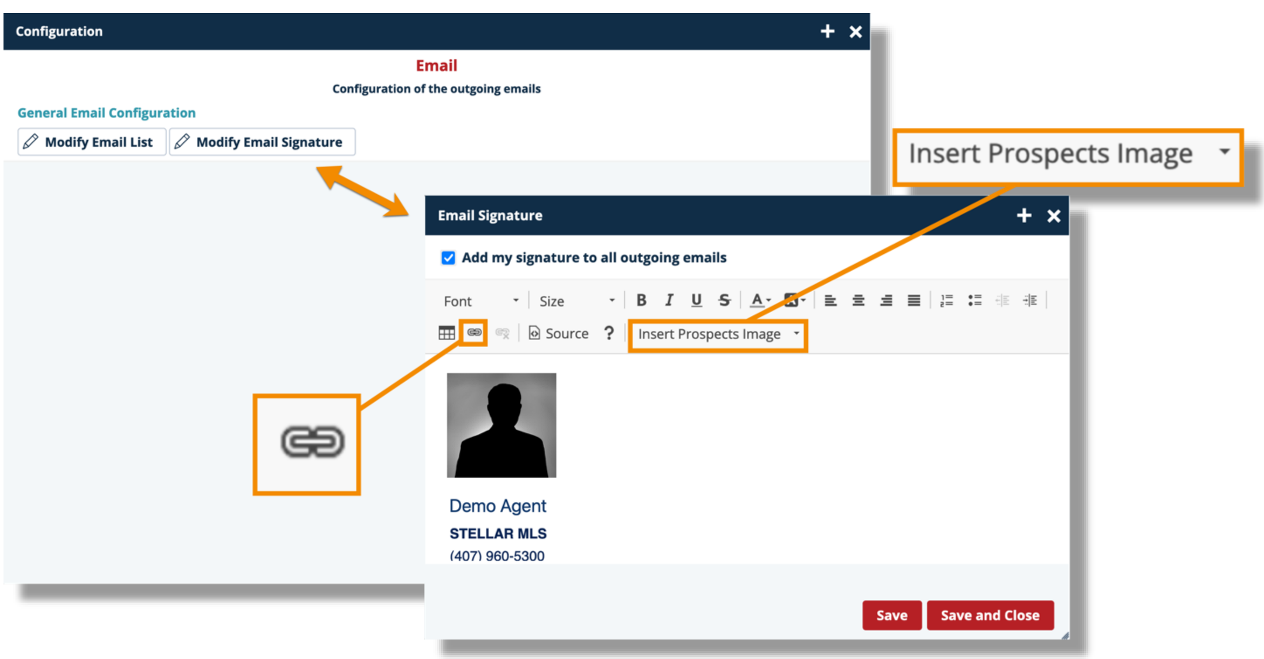


Email Signature

With your branding complete, return to the Configuration screen and select the Emails section to set up your outgoing email signature. Reminder, to access the Configuration options, click the gear icon in the upper-right corner of the main display window.



Once the pop-up window opens, click Modify Email Signature to begin the process.

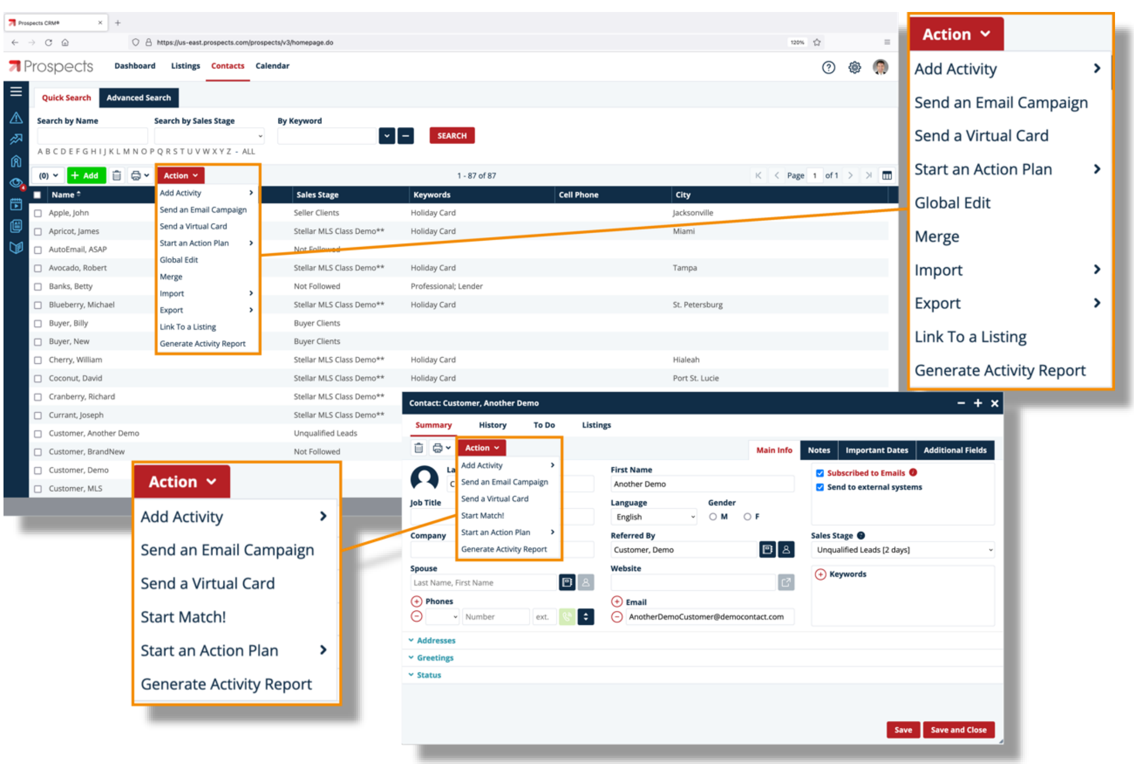


Use the formatting tools located in the first row of the tool bar to change the text entered for your signature. To include an image in your signature, simply choose the Insert Prospects Image option and a drop-down menu will display all images that were uploaded into the Images Library earlier in the Branding section. To add a hyperlink, click the link icon in the second row of the tool bar and fill in the desired fields. When ready, complete the process by clicking the red Save and Close button in the lower-right corner.

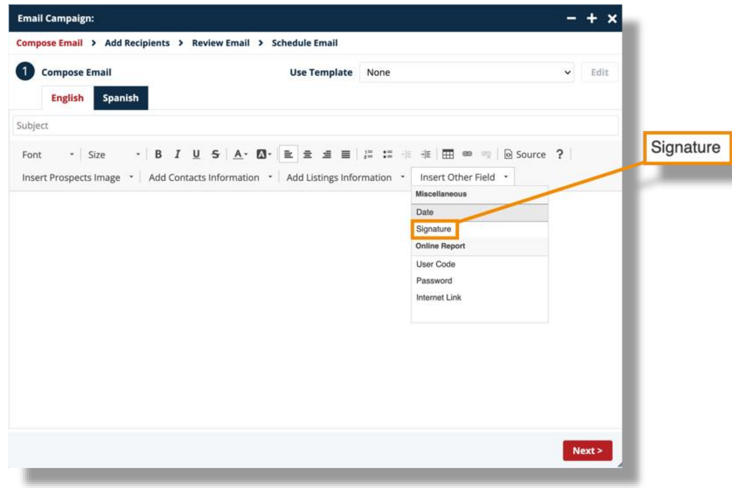
Email Campaigns

Whenever you wish to schedule an activity such as a to-do, follow up call, or appointment, look for the red Action button in Prospects CRM. This holds true for sending emails as well.

Whether sending a single email to a particular contact or out to an entire group of contacts, Prospects CRM makes it easy! The option to Send an Email Campaign is located by clicking the red Action button. In the image below, note that the Action button appears above the main contacts list display as well as in an individual contact record.



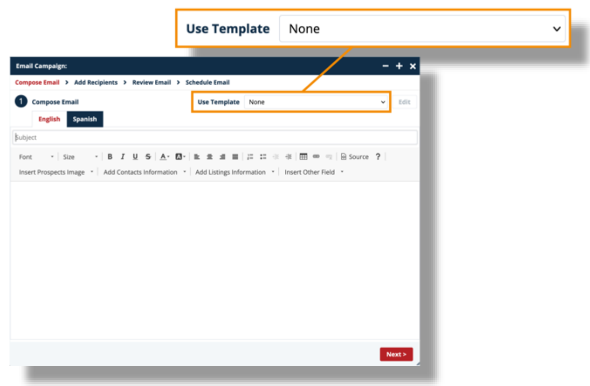
After selecting *Send an Email Campaign* from the Action button menu, just compose your email, verify the recipient(s), review the message, and choose when to send it – It's that easy! You also have access to the images you uploaded earlier to further customize your message so be sure to check out the options in the toolbar above the message body. You can insert any of the images uploaded into Prospects CRM as well as blocks of text such as your email signature.



To add your email signature, simply position your cursor in the body of the message where you would like the signature to appear and select Signature from the *Insert Other Field* menu in the toolbar.

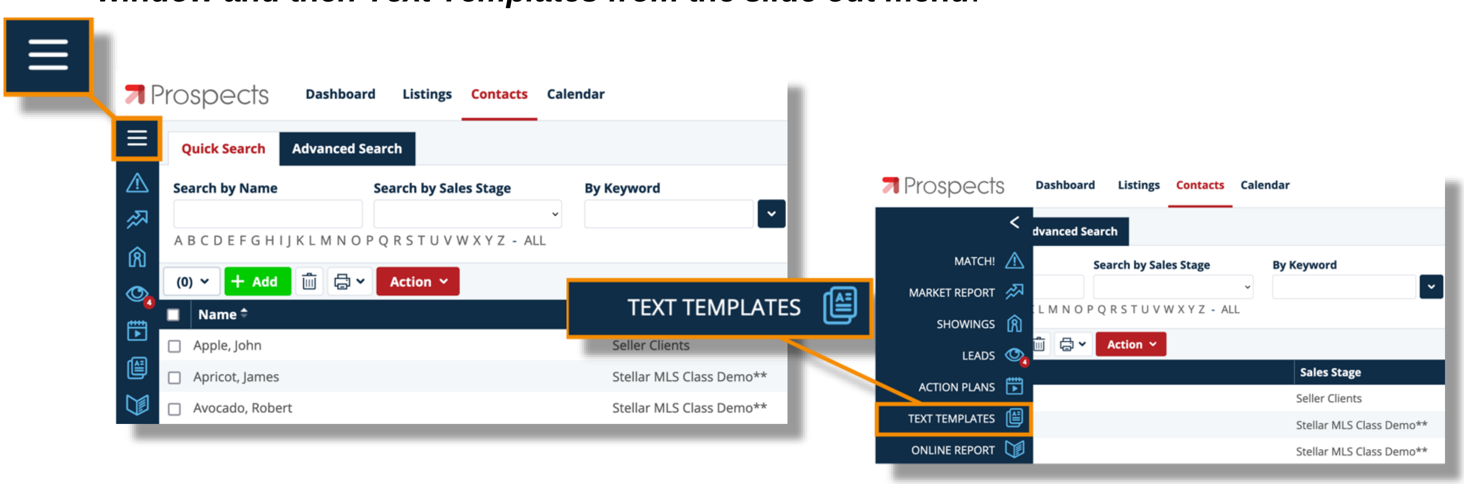
Text Templates

Not sure what to write? Prospects CRM has a variety of incredible Text Templates available for use right here in the Compose Email section. Look for the menu in the upper-right corner!

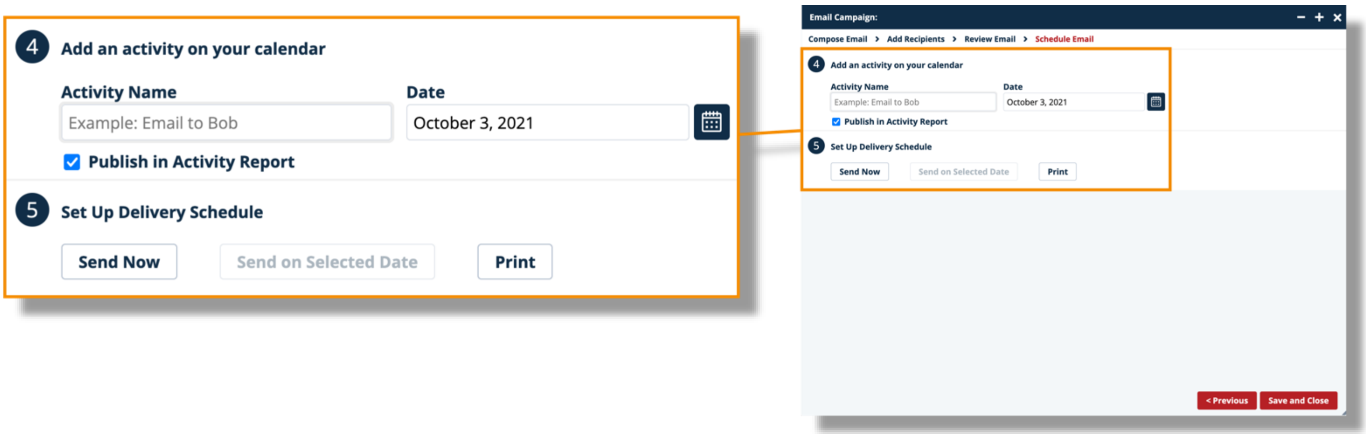


You will be amazed at the number of pre-defined templates available across a wide variety of catagories.

BONUS TIP: You can edit the template for a single message by clicking the Edit button in the Email Campaign window or you can customize any of the text templates permanently. To access the templates (as well as create your own), click the three-line menu near the upper-left corner of the main Prospects CRM window and then Text Templates from the slide out menu.



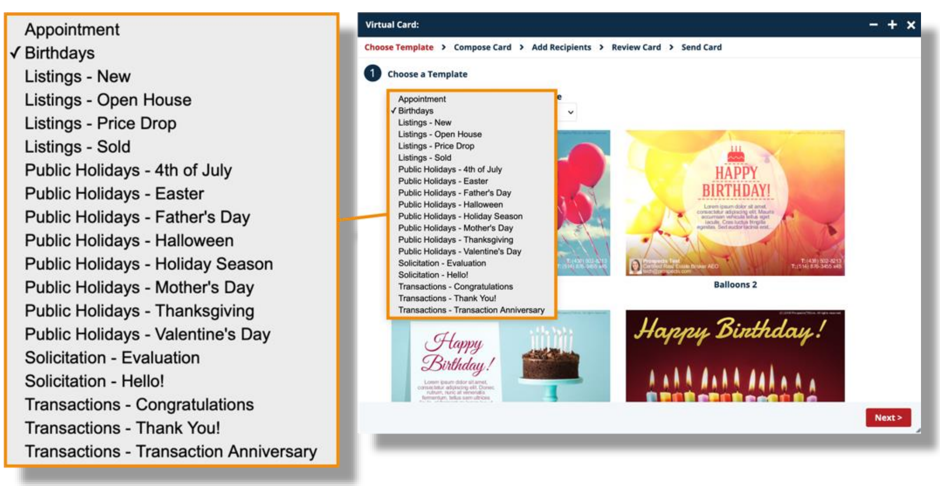
When satisfied with your message, click **Next >** to verify the contacts to whom the message will be sent and then again to preview your message. The last page allows you to specify a description for the activity and schedule the email to either be sent immediately or on a future date.



Virtual Cards

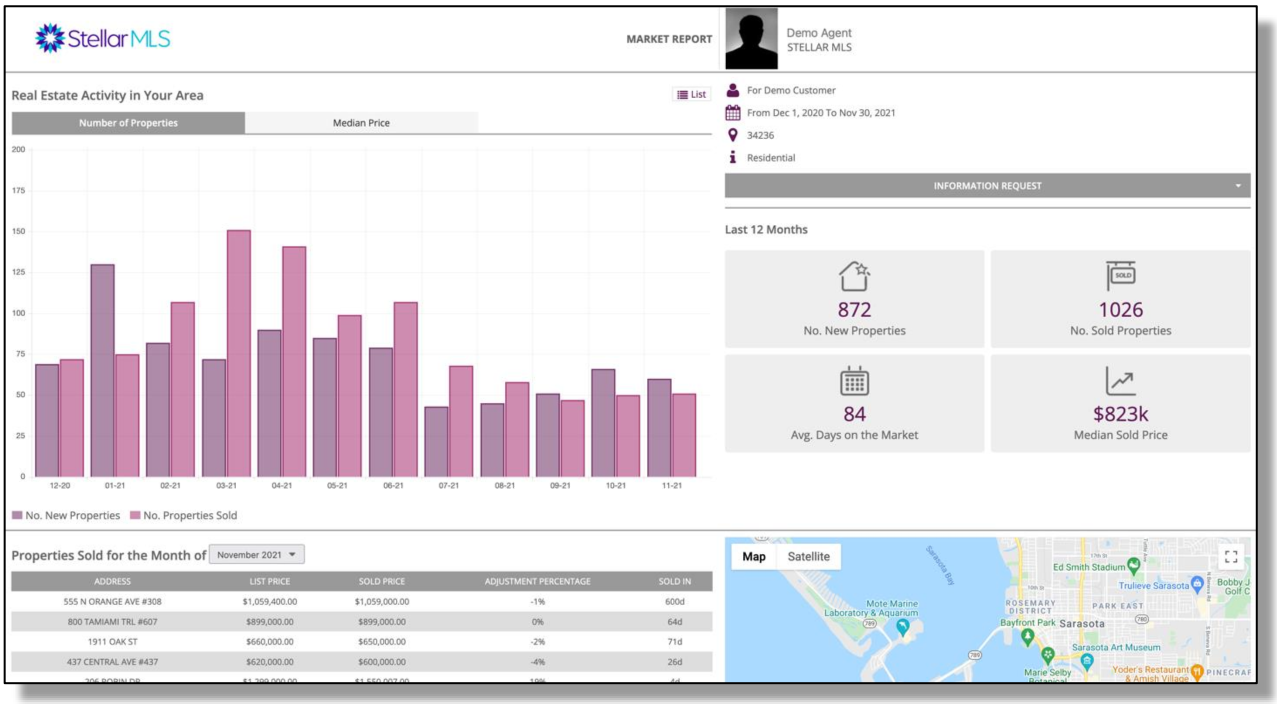
In addition to the incredible text templates mentioned above, Prospects CRM also has a variety of pre-built, colorful e-cards that you can use in your communications. To begin, select a contact or group of contacts you wish to send a card, then click the **Action** button and choose *Send a Virtual Card* from the menu.

A new window opens where you may choose a particular template from the dropdown menu and begin the customization process. You will find a variety of categories with fantastic designs that have space to add a brief custom message to further personalize the message. As before, step through the options to verify the recipients, check out a preview, and schedule when to send the card.

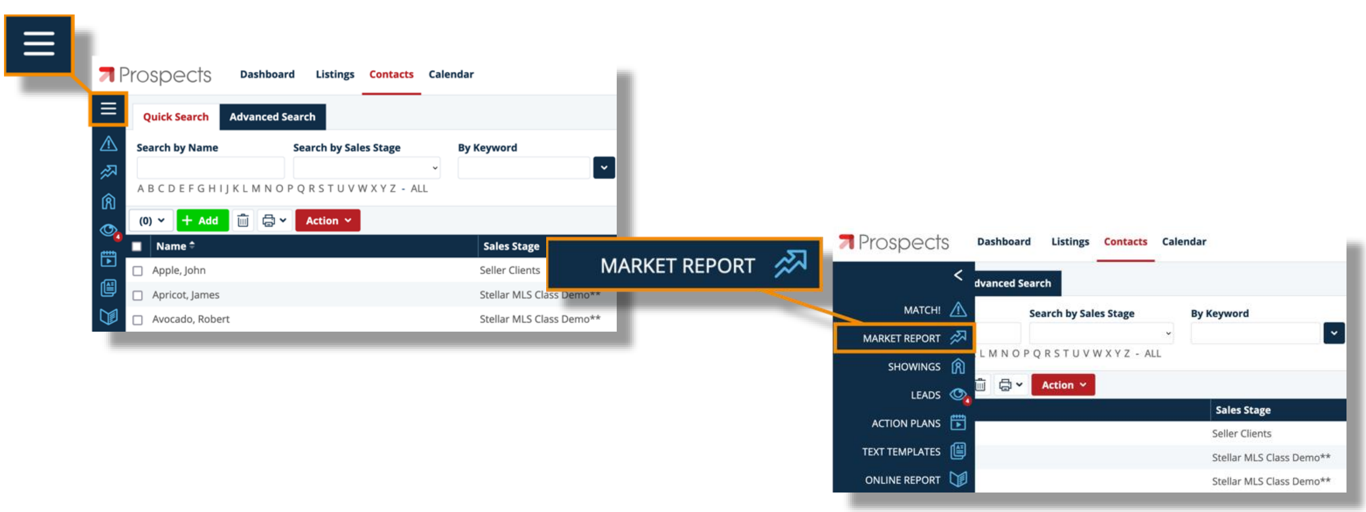


Market Reports

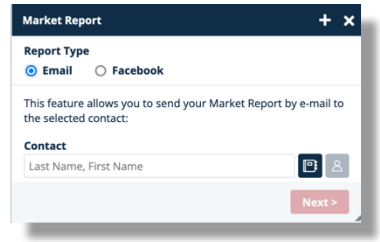
Due to its integration with Matrix, Prospects CRM makes it possible to send your contacts branded Market Reports for a particular area (zip code or city name), category of real estate (residential, vacant land, etc.), and property type. Market Reports are a great way to stay top-of-mind with your customers and prospects!

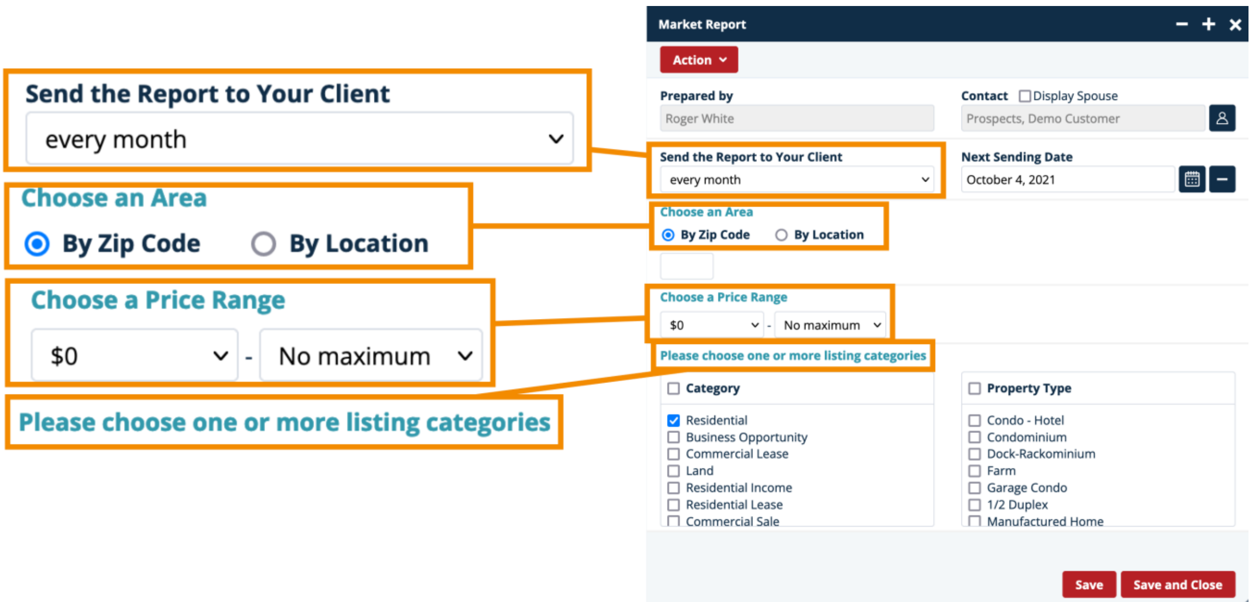


To begin, click the three-line menu in the upper-left corner of the main Prospects CRM window and then Market Report from the slide out menu.



To send by email, click the **+ Add** button and then the address book icon to choose a particular contact. Once complete, a window opens with a variety of options. Choose the frequency (every month or every 3 months), then the area, price range, and category of real estate (and property type when applicable).



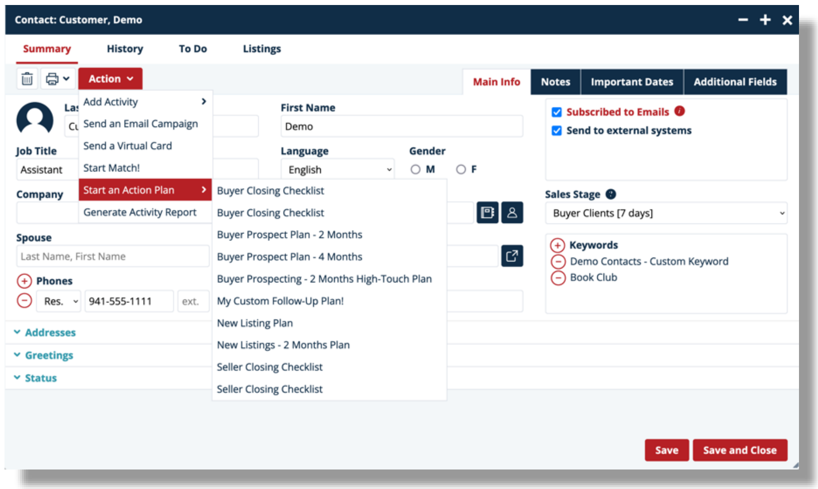


The Action button in the upper-left corner of this window allows you to send a link to the report via email immediately or preview the report in advance.

Action Plans

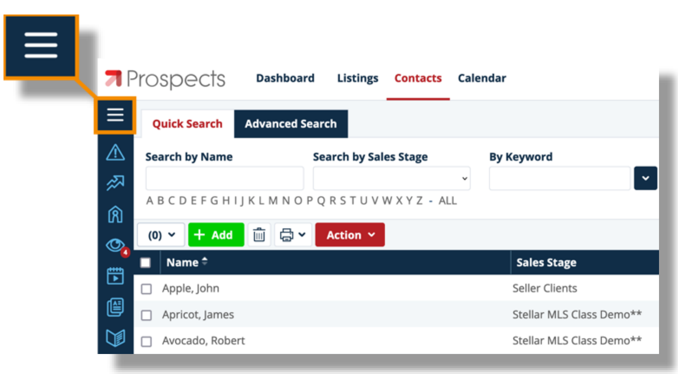
So far, we have described taking a single action on a contact or group of contacts. For instance, clicking the Action button shows a list of available options and you can add an activity such as a To Do, Follow-up Call, Appointment, etc.

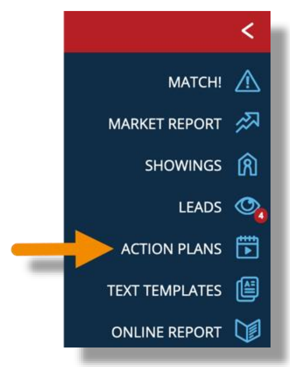
Once created, these activities can then appear in the calendar as well as on the Prospects CRM Dashboard.



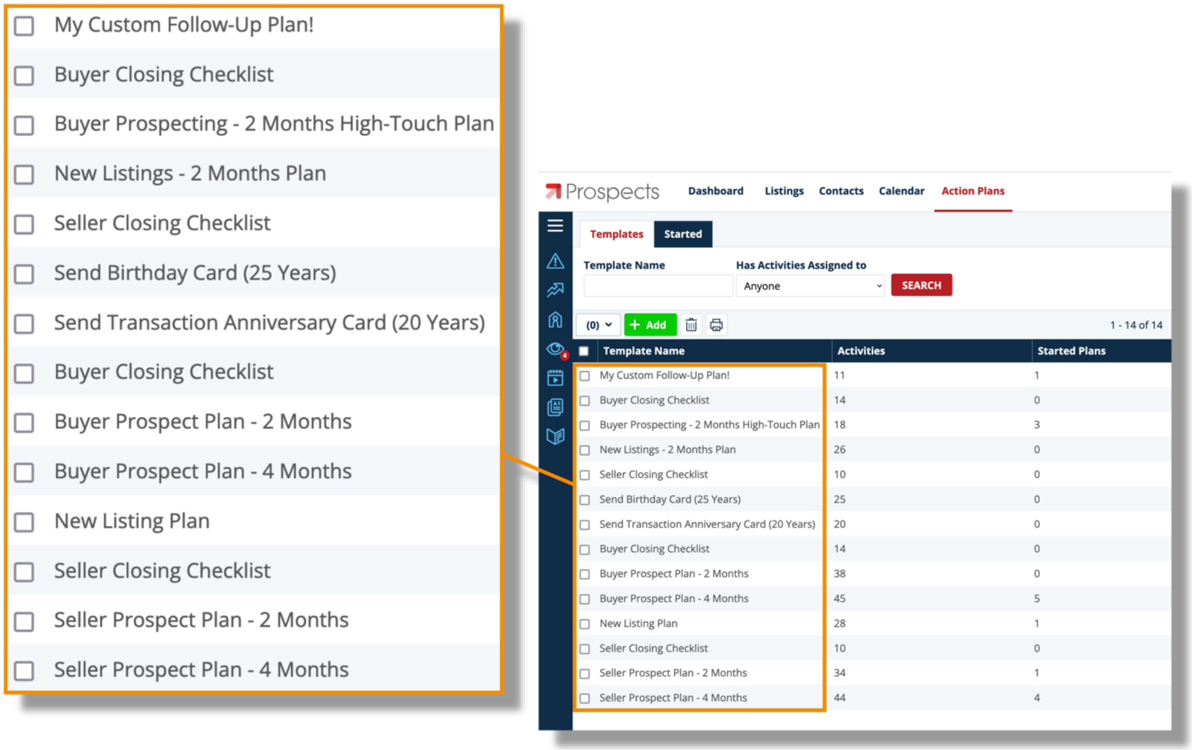
An Action Plan however combines multiple activities together allowing you to setup a series of events, to-dos, reminders, emails, and follow-ups and then assign them all with just one step. Action Plans are a great way to make sure that you are following up with your contacts and staying on top of your business. Simply select *Start an Action Plan* after clicking the Actions button and you can choose from a variety of predefined plans in Prospects CRM. Of course, as we learned earlier about Text Templates, existing Action Plans can also be modified, or you can easily create your own.

To review all the Action Plans available (or create your own), click the three-line menu near the upper-left corner of the main Prospects CRM window and then *Action Plans* from the slide out menu.





A new page opens displaying all the Action Plan templates contained within Prospects CRM, the number of associated activities, and information about those plans which have already been started. Double-click any action plan in the list to review its steps and make changes or click the **+ Add** button to create your own!



Additional Resources

Stellar MLS Classes

Be sure to join the Stellar MLS Training Team for more classes!

Signing up is easy – From the **Products & Services** page of Stellar Central, scroll down to the *MLS Education & Compliance* section and click “Stellar Class Sign Up”!