



## Become a Mobile Road Warrior Note Packet

### Understanding Today's Consumer

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Impact of Mobile [www.google.com/webmasters/tools/mobile-friendly/](http://www.google.com/webmasters/tools/mobile-friendly/)

### Hardware Buying for Real Estate Computer Buying Advice

#### Kinds of Portable Computers

Laptops & Ultrabooks - Everything works every time b/c you get the full computer experience, full OS, web browser, etc.

Tablets & 2-in1's - Mobile OS & browsers, so limitations, not everything works on them yet.

Super Tablets - Surface, iPad Pro, Galaxy Tab Pro

#### Computer Buying Checklist

- Make Your Own Personal Needs List
- Consider Compatibility
- Use [Belarc.com](http://Belarc.com) - Belarc Advisor Report
- Consider Company/Support not just Price

#### What it Does

Processor:

RAM:

#### Basics

< 2 GHz

< 8 Gig

#### Advanced

> 2 GHz

> 8Gig

### Smart Phones

#### Apple

+’s

- Only makes a few devices a year, always good
- Best real estate app & accessory selection
- Best security
- Ease of Use

-’s

- High cost of devices
- Lack of innovation
- Lack of customization

#### Android

+’s

- Huge selection, most innovative
- Huge app selection
- Amazing Google Integration
- More customizable & user-friendly

-’s

- Are some bad devices
- Higher security risk
- Less real estate apps & less accessory selection

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### Apps Tricks

Puffin - Alternative browser that supports Flash, Internet Explorer, & desktop rendering

TeamViewer - Remote Login to a desktop &/or laptop computer

#### Personal Organization Apps

Remember the Milk

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Google Calendar

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Calendly

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24Me

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Flipboard

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QuickBooks Self Employed

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Mint

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TPGtoGo

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QLess

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#### Travel Related Apps

Google Maps or Waze

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Gas Buddy

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Yelp, Yellow Pages, Around Me, Where, etc.

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Triplt

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Uber or Lyft

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TV Food Maps

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Tunity

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## Become a Mobile Road Warrior Note Packet

### Office & Communication Apps

Microsoft Office 365 (\$5/mo+) for both

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Apple = Pages (Word), Numbers (Excel), Keynote (Powerpoint) free but only for iOS

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Google Docs (both and free)

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Dropbox, OneDrive, SugarSync, Box & Google Drive

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Google Chrome

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Genius Scan

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CamCard

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Slydial

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Google Voice

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Skype, Google Meet/Duo, WhatsApp, Viber, Tango, etc.

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Voxer

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### Photo or Video

Camera Plus (\$.99)

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MyRadar

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SunSeeker (\$.7.49)

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BeFunky

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Canva

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BombBomb (if you are a BombBomb customer)

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Videolicious, Magisto, Animoto or WeVideo

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### Real Estate Apps

REALTOR.com, Zillow, Trulia, Homes.com, Loopnet, Rent.com

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Action Center (RPAC)

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NAR RPR Mobile App

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HomeSnap

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Supra E-Key or Sentri-Lock

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Open Home Pro

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MagicPlan

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Home Depot or Sherwin-Williams Color Snap Visualizer

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Homestyler Interior Design, Curate by Sotheby's or IKEA Place

### Real Estate Customer Service Apps

Home Diary

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Centriq

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Handyman Toolbox

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LandGlide or OnXHunt

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Felt

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KeyMe

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Google Translate

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Money Corp

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PalmAgent

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Karls Mortgage



## Become a Mobile Road Warrior Note Packet

### Software

#### What is Cloud?

Anything you do on a **computer device**, but it doesn't happen on that device (not installed) but through the **Internet** (website, app, software, etc.). It's using the power of the Internet to compute.

#### Advantages of Cloud

- Able to access and work on files, calendars, etc. from any location, device, anytime both online and off
- Share & collaborate with others. Syncing of files & devices
- Reduce Costs, Increase Efficiency.

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**Google Workspace (formerly GSuite)** ([google.com/workspace/](http://google.com/workspace/)) \$12/mo per seat

- Gmail including calendars, tasks, notes, etc. - (eliminate paying for Outlook with unlimited inbox size)
- Google Drive - 2T File Storage (could eliminate paying for Dropbox)
- Google Docs - Free Office Integration (could eliminate paying for Microsoft Office 365)
- Google Forms - create questionnaires, polls, surveys, sign-in/landing pages, etc.
- Google Meet & Voice - phone, text video (eliminate phone & video conferencing)
- Google Keep - can be used for note-taking, organization, etc. (eliminate paying for Evernote)
- Google Drive Sync - backup entire computers into Google Drive (eliminate paying for Carbonite)
- 24/7 Support with Google, Free On-Boarding, Great Security

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#### 3 Steps to Digitizing Your Office

1. VOIP Internet Based Phones (Ooma, Nextiva or RingCentral)
2. E-Faxing (efax.com, jfax.com, etc.)
3. Google Voice

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#### Syncing

Always utilize cloud backup/sync options iOS = iCloud Android = Google Drive + Play Store

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Make sure your email account is IMAP or cloud-based so it will sync your email, contacts, calendars, tasks, & notes associated with that email account.

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## Become a Mobile Road Warrior Note Packet

### What is Customer Relationship Management (CRM) & Why is it so Important

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### How to Pick the Best CRM for Your Business?

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#### 1. General (Salesforce, InfusionSoft, Hubspot, etc.) or Real Estate CRM

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#### 2. Stand-Alone, Website Provider or Gmail Add-On Real Estate CRM

<b>Stand-Alone</b> Provides just CRM, no Website	<b>Website Provider</b> Provides CRM + Website	<b>Gmail Add-On</b> Provides just CRM, no website
<ul style="list-style-type: none"> <li>• Wise Agent</li> <li>• Lion Desk</li> <li>• RealtyJuggler</li> <li>• Realvolve</li> <li>• FollowUpBoss</li> <li>• PropertyBase</li> <li>• TotalBrokerage</li> <li>• Streak for Real Estate</li> </ul>	<ul style="list-style-type: none"> <li>• BoomTown</li> <li>• Brivity</li> <li>• Cinc</li> <li>• Ixact Contact</li> <li>• BostonLogic</li> <li>• Chime CRM</li> <li>• BackAtYou</li> <li>• MoxiWorks</li> <li>• KVCore</li> <li>• Firepoint</li> </ul>	<ul style="list-style-type: none"> <li>• Streak for Real Estate</li> <li>• Yesware</li> <li>• Insightly</li> <li>• Zoho</li> <li>• Copper</li> <li>• ClickUp</li> </ul>

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#### 3. What 3rd-Party Tools Do You Want/Need to Integrate With?

<input type="checkbox"/> Contract, Forms & Transaction Management	<input type="checkbox"/> Task Management
<input type="checkbox"/> Communications	<input type="checkbox"/> Marketing Solutions
<input type="checkbox"/> Real Estate Portals & Other Lead Sources	<input type="checkbox"/> IDX Feed
<input type="checkbox"/> Other (Quickbooks, Office 365, LoneWolf, HomeSnap, CloudCMA, Google Workspace, IFTTT, Zapier, etc.)	

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### 4. What are Your Must-Have CRM Features?

<input type="checkbox"/> Contract, Forms & Transaction Management	<input type="checkbox"/> Task Management
<input type="checkbox"/> Communications	<input type="checkbox"/> Marketing Solutions
<input type="checkbox"/> Follow Up Automations	<input type="checkbox"/> Document Storage
<input type="checkbox"/> Financial Tracking & Tax Preparation	<input type="checkbox"/> CMA's & Listing Presentations
<input type="checkbox"/> CMA's & Listing Presentations	<input type="checkbox"/> Marketing Design Center
<input type="checkbox"/> IDX Feed Integration	<input type="checkbox"/> Compliance Reporting
<input type="checkbox"/> Team Lead Routing & Management	<input type="checkbox"/> More/Other?

### 5. Are You Buying a CRM for Yourself, Team, or Company?

If for a Team or Company, you need to consider:

- Lead Routing
- Number of Users it Supports
- Level of Admin Control
- Reporting & Financials (Activity & Compliance)

### 6. What is the On-Boarding Process Like? How Long will it take to get fully up & running?

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### 7. Does the Program have a Good UI or Usability/Seem Easy to Use?

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### 8. What's their Customer Service/Support Like?

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### 9. Price & Value = Sum of All the Parts (1-8)

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To research, learn about, & compare the industry's best CRM Vendors check out the CRM Generator at <https://reti.us/crm>

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## Become a Mobile Road Warrior Note Packet

### Tools to Help You Go Virtual

**Floorplans** (FloorplanOnline, Ricoh Z1, Asteroom dock, MagicPlan app, Matterport/IGuide)

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**Virtual Showings** (video calls on Skype, FaceTime, Facebook Messenger, WhatsApp, etc.)

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**Virtual Open Showings** (live stream to Facebook, YouTube, Twitter, Instagram, LinkedIn, etc.)

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*Remember to pre-schedule live showings as events & draw in more on FB & IG with Watch Party*

**Virtual Showing Tools** (staging - HomeStyler Indesign, Curate or Ikea Place apps or VisualStager.com or BoxBrownie to do it for you)

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**Listing Presentation Tools** (NARRPR.com, CloudCMA or StudeoHQ)

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**Transaction/Task Management** (many CRMs & Form Management tools include or Aintree/Folio, Broker Sumo, Clozio, BackAgent)

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**Contract & Forms Management** (AppFiles, DocuSign Transaction Room, DotLoop, FormsSimplicity, TransactionDesk, Skyslope, ZipLogix)

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**E-Notary & Closing Services** (Notarize, Qualia, EndPoint or eClosePlus)

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**Digital Diary Tools** (HomeDiary.com or CentiqHome.com)

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**Digital Marketing Tools** (pixlr.com /e, /x, /remove-background, Canva, YouTube Studio, WeVideo)

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## Become a Mobile Road Warrior Note Packet

### Risk Management & Safety for Real Estate

Backup Your Entire Devices - Carbonite.com, Mozy, or Google Drive Sync

Battery Doctor

Message (iOS) or SMS Backup & Restore (Android)

LastPass

#### Base Psychology Password

<b>Base</b> Same on Every Site (but needs to be weird and random)	<b>+ Psychology</b> 1 Word that makes You Think of Each Site	<b>+ Quarter/Year</b> Allows you to easily update throughout the year
2Sr1pMx	Facebook = zuck gmail = gmail aol = aol mls = mls	Q2 Q3 Q421
for example Facebook would be 2Sr1pMxzuckQ421, mls would be 2Sr1pMxmlsQ421 ...then in January, they would be 2Sr1pMxzuckQ122, mls would be 2Sr1pMxmlsQ122		

Protect All Devices with the Best Anti-Virus - Avg, Avast, or MalwareBytes

#### Protect Yourself Out in the Field

Take advantage of the Emergency SOS Feature in Your Phone (volume & power button for 5 seconds)

**Accessories** (flare.com, sirenring.com, invisawear.com, React Mobile, runt & mace 80816 flash stun gun)

#### REALTOR Safety Apps

NoonLight, Kinetic Global Lifeline, OneScream, or BSafe

Agent Safe Walk

Real Safe Agent

Forewarn