6 steps to begin taking advantage of automation now

Automation is supposed to be a great new tool to help agents, but, let's admit it, getting started is tough. The dream shines on the horizon, just within grasp, where agents' most repetitive tasks disappear from to-do lists. However, day after day, automation remains on their to-do list.

While every day for real estate agents is different, which is exciting, they still face plenty of repetitive actions that don't require fresh thought. Performing tasks from scratch is a struggle, which doesn't just drain agents' patience, but also drains their most valuable resource: time they can spend with clients. The mission of every technology product agents use should be to free them up to do what they do best.

Marketing automation isn't just about making things easier, it's about ensuring the delivery of service that has a consistent and recognizable look. The more agents automate, the more consistent their tasks become. In this way, their clients and potential clients get familiar with them, their process and materials. Automation centers on building an easily adaptable system tailored to each agent's specific workflow.

The biggest barrier to entry for agents around automation is knowing what to set up. To kick-start automation in their workflow, agents should identify the tasks they do repeatedly that follow a specific workflow. They should ask themselves if they can simplify these in any way. Another tactic is to look at their "should do" list — the techniques they heard about at conferences or learned about online. Are there any ways to automate those processes?

How to get started with automation

There are several easy steps agents can take to begin introducing automation into their workflow.

Break contacts down into groups for easier automation. As anyone who has set up a CRM knows, the more time you put into setting it up, the better the results and the more the system's ready for automation later. Agents should decide what groups they want to put contacts in and as they add them to their database, place them into the appropriate bucket. They can then assign a separate automation plan for each category. Grouping contacts in this way allows agents to reach a broad group in a way that feels personalized.

Take it out of email. Email is a brilliant communication tool, but one of its secret powers is that it can be used to automate other actions. By using CRM-building tools such as the Quick Adder from Adwerx along with the blind carbon copy (bcc) feature on an email provider — which sends a copy of an email to another address that remains unknown to recipients — agents can ensure emails go directly into their CRM and other systems where they can become part of upcoming automated mailings and ads. This type of automation is an easy way to facilitate agents' reach with leads and clients.

Have a timeline for listings. The first 30 days are critical in the life of any new listing, which means having a defined launch timeline is important. Once all the materials are gathered, an agent's system should be organized so that the listing, ads, postcards and campaigns deploy effortlessly. That way they don't have to remember to set up ads for their listings — they simply happen on their own.

Agents should make sure that their listing plans include both pre-marketing and follow-up campaigns that feature online and print content. Successful automation is all about triggers — actions that occur when another action occurs or specific date is reached. Listings proceed along a plan based on specific actions, making them great candidates for automation.

Use products that talk to each other. There's nothing more frustrating than having to repeatedly re-upload the same pictures and descriptions. Products that share APIs can help simplify and streamline. For technologies that don't automatically sync, tools such as IFTTT (If This Then That) and Zapier can help different systems talk to each other.

Listings provide an opportunity to take advantage of these types of integrations as listing details can live in many places.

Think beyond the online world. Emails and texts aren't the only actions agents can automate. They can also automate listing and follow-up print campaigns, postcards and notes at regular intervals. Another great action they can automate is gifting, ensuring that past clients receive a gift on their birthday or purchase anniversary. Their clients get a surprise and they don't even have to think about it: the magic of being thoughtful without the thought.

Build your editorial calendar. The same events happen every year: holidays, birthdays, local events. The start of each year — when agents build their marketing and advertising budgets and set their goals — is a great time for agents to plot out automating everything they can schedule in advance. Agents can use date triggers to plan a year of mailers and emails so key dates don't catch them by surprise.

Automation doesn't have to be overwhelmingly technical or impersonal. When it works right, automation disappears into the background — an agent's invisible support system that delivers effortless results.

At Adwerx, marketing automation is baked into each of our real estate products. Our new listings system automatically creates digital ads from agents' listings pipeline, and our new Quick Adder tool allows agents to add contacts to their digital advertising program simply by adding a bcc to an email they're already sending. Visit Adwerx to see how we can help automate your marketing.

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