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Growth-oriented Keap hits most of the CRM high notes

Have suggestions for products that you'd like to see reviewed by our real estate technology expert? [Email Craig Rowe](#).

Keap Pro, formerly Infusionsoft, is customer relationship management (CRM) software.

Platforms: Browser, mobile-responsive

Ideal for: Agents, teams and brokerages looking for a non-industry advantage

Top selling points:

- Outstanding user experience
- Texting interface
- Pipeline feature
- Email marketing focused
- Built-in invoicing

Top concerns:

The automations within “Campaign Builder” require manual design in a drag-and-drop, diagramming format. Other CRMs on the market have more straightforward ways to execute such capabilities.

What you should know

There are some very sharp features within Keap, a CRM solution not centered on real estate but undoubtedly worthy of supporting it.

The “Pipeline” feature stands out and would be a great way to manage listings, from agreement to finalizing escrow.

The tiled user experience is reminiscent of Trello (note: Inman’s editorial staff uses Trello), as each step along the way, called “Stages,” has its own card.

Each stage has:

- High-level details

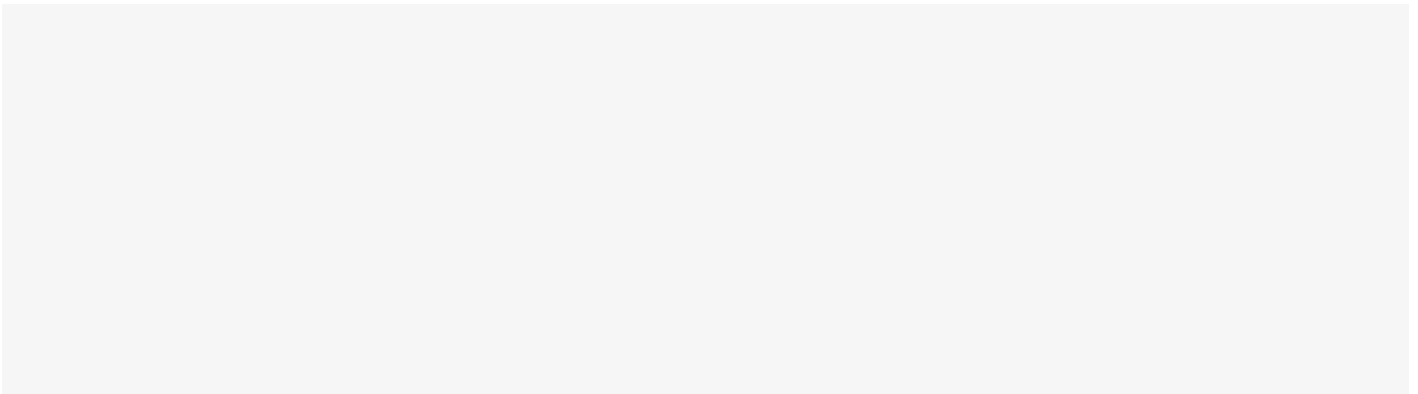
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- Ways to click into messaging and contacts
- Places to upload documents
- Access to everything needed to advance the transaction

Stages are an insightful way to see every step as it stands by itself and within the context of the greater business operation.



Users will enjoy Keap's easy, open interface. There's a lot of space between features and crisp ergonomics.

I dig the action title lexicon, too. Instead of blandly labeling the tasks and contacts module, it's called "Get Organized." Quotes sent and accepted (in the case of real estate, executed agreements and related documents) are under "Get the Job." It calls email tracking "Stay Connected."

It's crucial for software to incite action, which is the job of UX design. Keap does it well.

The rest of the main screen has the usual suspects intact, such as an activity timeline, task summary, and calendar.

However, since it's not developed strictly for real estate, some adjustments would have to be made.

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For example, under “Get the Job,” it uses the word “quotes” —not a real common term in the real estate space unless it’s about repair estimates. And the “Invoicing” module could have *some* use for agents in daily business chores, but it’s structured for things like vendors and products.

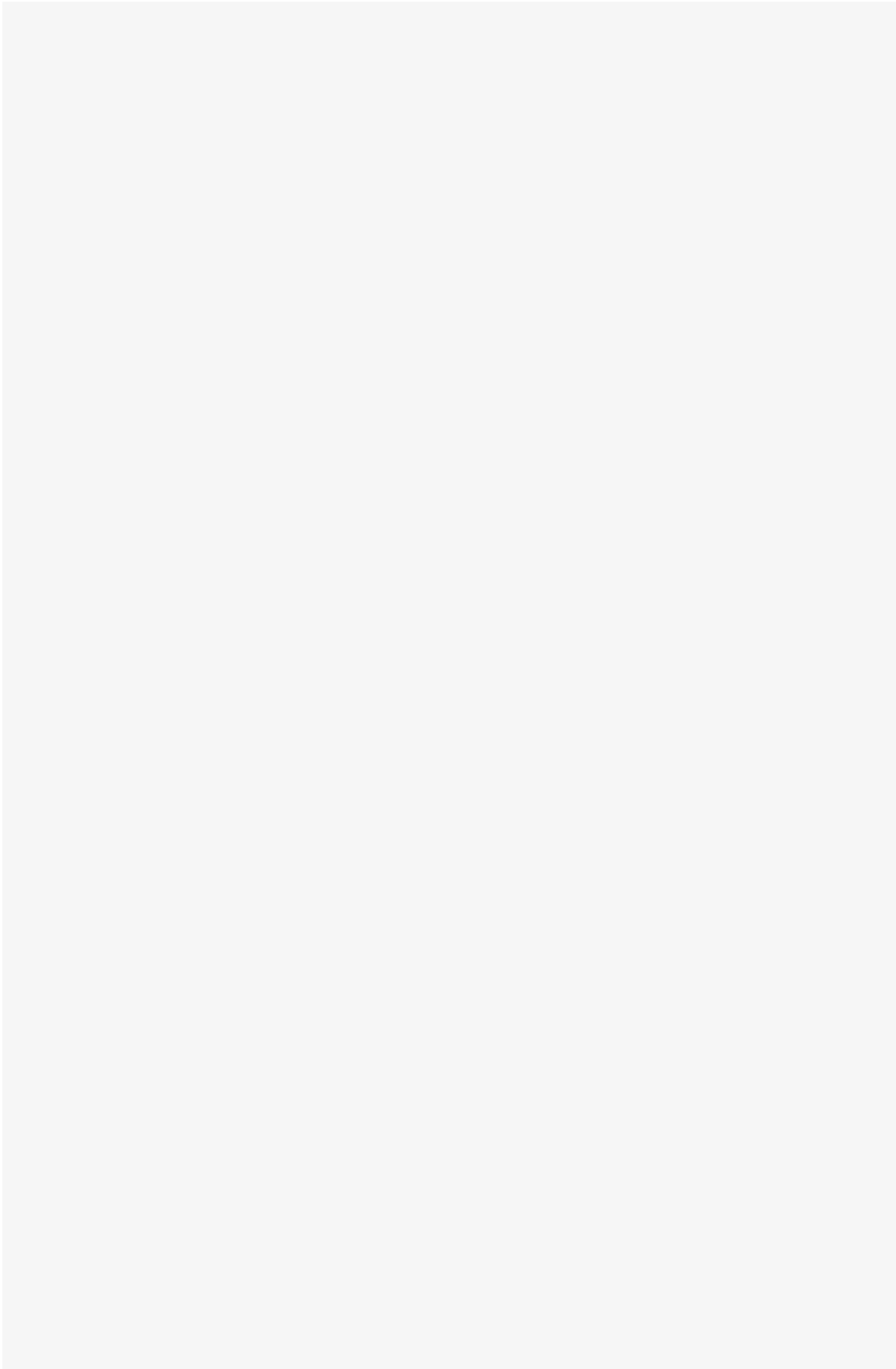
Thus, it would take some thought and work with the company to adjust it for real estate accounting, especially when compared to other such systems that quickly calculate splits and desk fees, etc.

The texting interface Keap uses is another highlight, functioning very similarly to a native phone app. You can open it directly from a contact’s profile card, and it can add images and emojis and maintains the conversation within the record.

Contacts are easily imported from Gmail or Outlook as well as from Mailchimp, Hubspot and even Quickbooks. Each record has an easy way to scroll through your history with it, from initial contact to the latest related tasks or automation it’s a part of.

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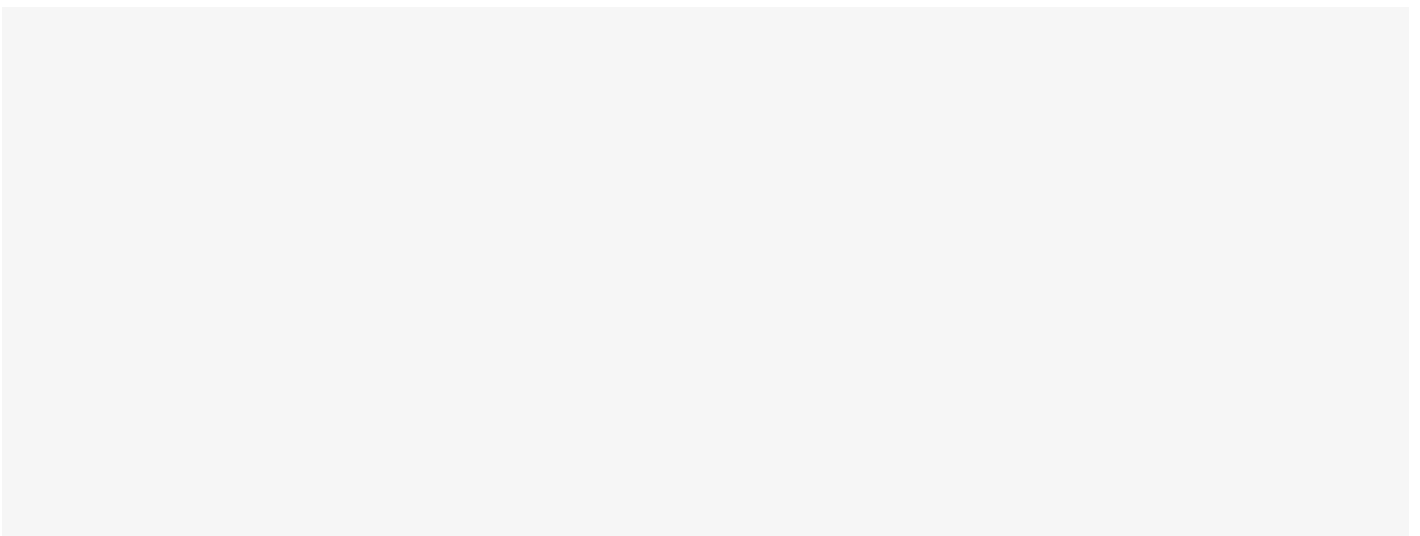
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The calendar tool offers two-way sync from either of the above, too. It also provides auto-scheduling, much like Calendly, and allows agents to build in “Buffer Times” between appointments so you can have a minute to breathe between calls. Nice.

Email features (called “Broadcasts”) come with rich templates and an easy, icon-driven design front. You can build contact lists and save them and tag clients based on the links they open.

For example, if you can include a local article about where to hike, and it’s received well, you’ll know to send more information like it. I continue to be surprised at how well CRMs have integrated what used to be found only in stand-alone email marketing platforms, such as Mailchimp or Constant Contact.

I admit to being a little disappointed in “Campaign Builder,” the sales automations feature specifically. It’s not because it lacks power; it’s the setup process.



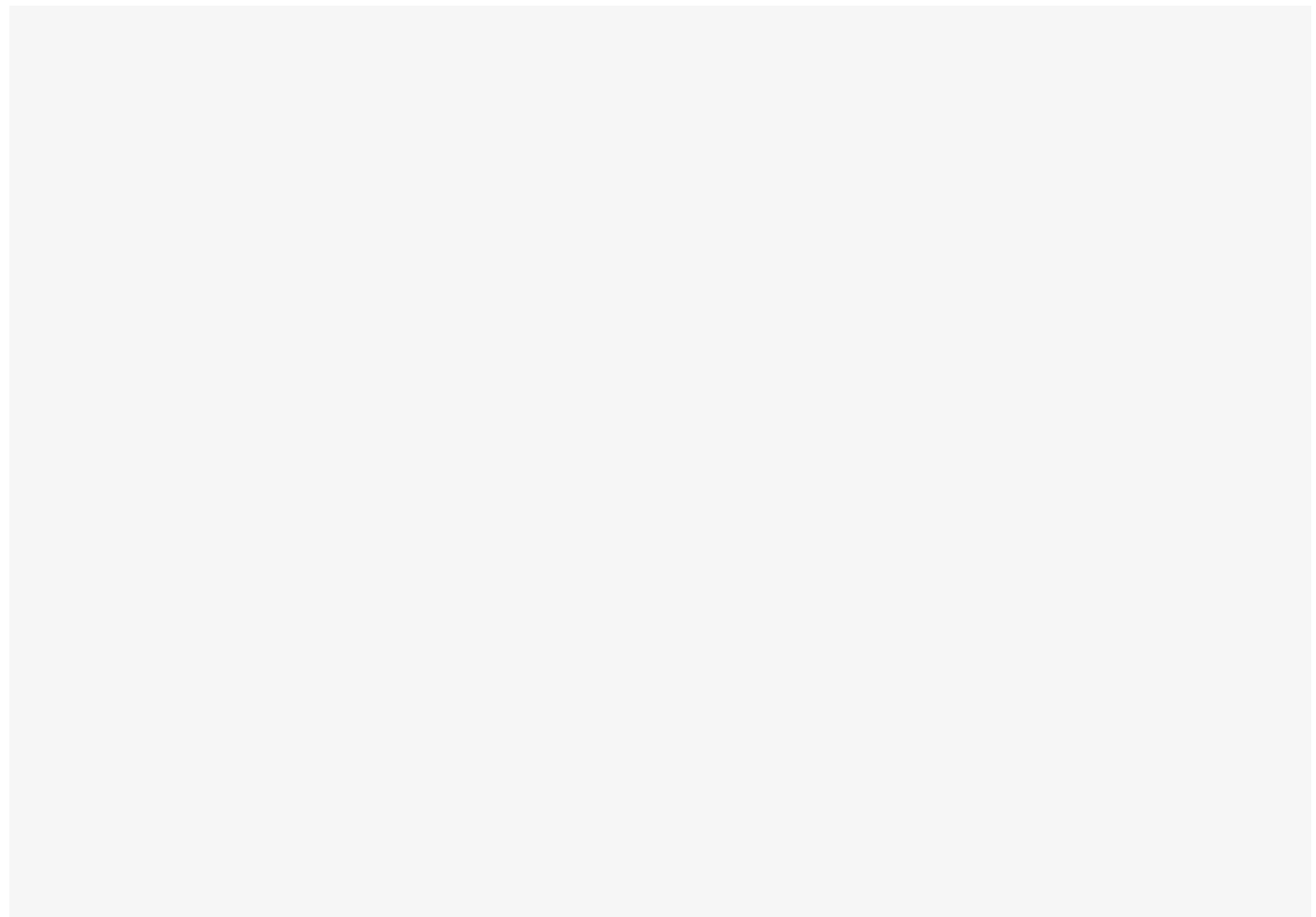
Connecting actions, or sequences, occurs on a “canvas,” where users physically pull and link one “goal” to the next. Some prefer this method, as it allows for a lot of transparency. Know that it takes a bit more logical thought to design exceptions and contingencies.

If the included automation can work for you, then the setup concern won’t matter to you.

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That said, Keap offers two onboarding training videos per day, and it provides a U.S.-based support team that runs from 9 a.m. to 10 p.m. EST every day.

You can also review [this video page](#) to get a quick run-through of its significant features.

A lot of what you should expect is here, including simple list import and management, website lead capture forms, and a very modern, engaging user experience. There's a lot to like here.

Now, is there anything bleeding edge here? No. But it looks good and has all the right tools. It should be easy to learn, too.

Small brokerages and teams that want a way to get organized, do some marketing, and leverage the software your competitors are likely not aware of, add Keap to your list.

Have a technology product you would like to discuss? [Email Craig Rowe](#)

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Craig C. Rowe started in commercial real estate at the dawn of the dot-com boom, helping an array of commercial real estate companies fortify their online presence and analyze internal software decisions. He now helps agents with technology decisions and marketing through reviewing software and tech for Inman.

Source: [click here](#)