

The



Universe

Web Series

Google Contacts and CRM

**Google's Web Based Tools for improved
Productivity and Communication**

**Handheld Computer Solutions
G. William James**

How To Keep In Touch

www.gwilliamjames.com

william@gwilliamjames.com

@MyGWilliamJames



Handheld Computer
Solutions



G. William James



GWJ2000



@RealGWilliamJames



G. William James



- Black Enterprise Magazine's "Master Of The PDA"
- Google Apps For Business Affiliate
- Member, National Speakers' Association

Career Highlights

- ❑ 1980s Executive Forums, Inc. Presented time management workshops
- ❑ 1999 Corporate speaker for Palm, Inc. on the power of the PDA
- ❑ 2004 National Presenter for the launch of the original Supra eKey & iBox
- ❑ 2008 Introduced 1st Gen iPhone as a Realtor tool
- ❑ 3-Time Presenter to The National Association of REALTORS® Conference
- ❑ 2005-Today Distinguished presenter of Google Apps for mobile business

william@gwilliamjames.com

Subject Line Only!!!

Google CRM 2021

What Is A CRM and Why Do I Need One?

Customer Relationship Management

- **CRM is a technology for managing all your business relationships and interactions with customers and potential customers.**
- **As the foundation of your business operation. the primary goal is to improve business relationships and grow your opportunities.**
- **A CRM system helps you stay connected to customers, keep up with significant dates, customize and develop to meet your needs, and ultimately improve profitability**
- **It is a vital part of driving revenue into the business through reliability, the value of your brand and your marketing strategy.**
- **Your clients are the generator of leads and referrals for new opportunities, and their endorsement is your business' life blood.**

What Is A CRM and Why Do I Need One?

Building Up and Staying Connected To Your Customers

- **Using specific fields in your CRM, directly market to segments of your contacts database.**
- **Organize your contacts into Google CRM from Outlook, Apple, Top Producer, Salesforce, even spreadsheets, and sync to your devices.**
- **How to create a list of valuable contacts and make yourself the same in the contact lists of your customers.**
- **Share contacts with individuals or create a master list for the organization**
- **How to Create email lists in Google Workspace (Advanced)**

What Is A CRM and Why Do I Need One?

Make Significant Dates Easy To Remember

- **Use Google CRM to keep up with and acknowledge customers' important life events. Make each contact unique and valued to you and they will respond with business opportunities.**

You already have in your contacts list:

- **Doctor**
- **Dentist**
- **Hair Stylist**
- **Accountant**
- **Mechanic**
- **Gardner**
- **Dry Cleaner**
- **Other Favorites**

This is your regular go-to list of people you rely on to meet your needs.

Whose list are you on, and do they think of you first for any real estate needs?



CRM

**Client Relationship
Management
System**

**Communication
Productivity
Marketing
Sales Management**

The Three Steps To Building Your CRM

Step One: Start with what you already have

- Look for contacts in all your current sources (Outlook, Top Producer, etc.)
- Go through each of your contacts, updating the empty fields
- Fill those gaps as much as possible, with a focus on future marketing

• Step Two: Customize, organize and downsize

- *Create custom category labels, and identify who goes where*
- *Place contacts in multiple categories if possible*
- *Delete or archive contact information you no longer need or use*

Step Three: Protect your data by sharing it on the cloud

- *Export your entire database, save it in a Cloud app (Dropbox, iCloud, etc.)*
- *Save a copy as a CSV spreadsheet, and keep safe in your Google Drive or Excel*
- *Update your backups monthly, especially if your primary lists changes frequently*





**Mobile
Technology
For
Real Estate**

**Thursday
October 28, 2021
10:00 am
Eastern**

The



Universe
Web Series

The Hidden Secrets of Gmail

The Ultimate Gmail Masterclass

- **Gmail is the** world's most powerful email app
- **Learn how** to master Gmail's many features
- **Bring all email** accounts into one convenient place
- **Customize** Gmail for convenient email management
- **Learn to** automate Gmail for 24-hour customer care
- **Learn to** better secure your Gmail and Google Accounts
- **Much, Much More!**

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THANK YOU!



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