## The



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**

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Handheld Computer Solutions



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# 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 1<sup>st</sup> 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

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# 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

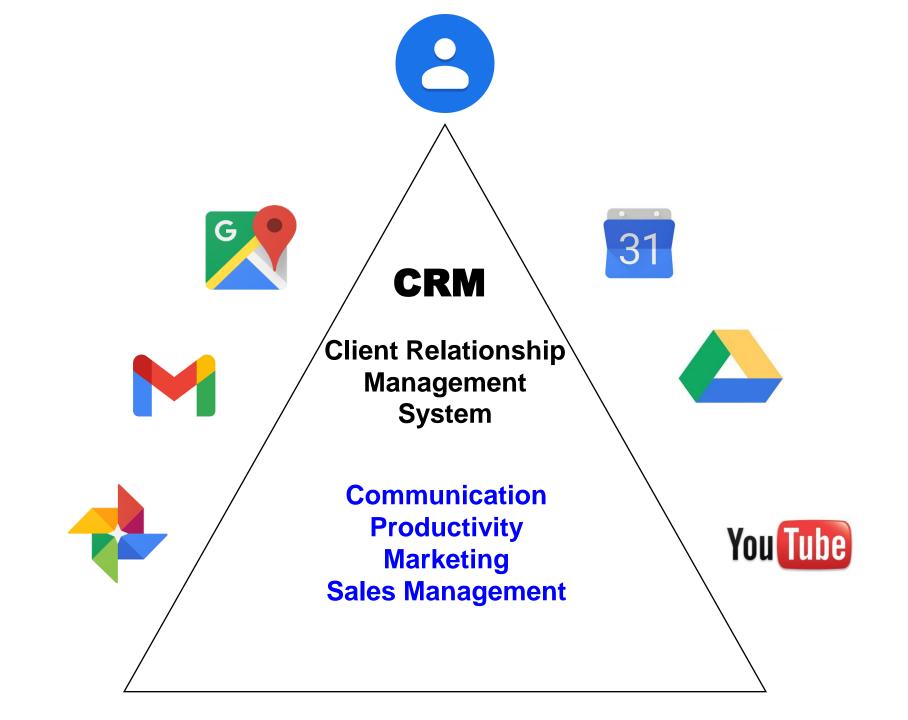
 Use Google CRM to keep up with and acknowledge customers' important life events. Make each contact unique and valued to you and they will respond with business opportunities.

#### 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?



#### 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



# 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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