

Your guide to creating an estate agency tech stack that works

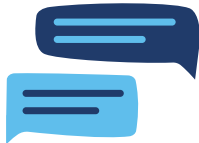
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Suffering from growing pains?
Productivity slowing down?
Competitors building momentum?
Data security not up to scratch?
Software keeps dropping off?
Or breaking?

Sound familiar?

If you answered yes to one or more of these, now is a great time to read this ebook.



Need help or have a question?

You can reach us at

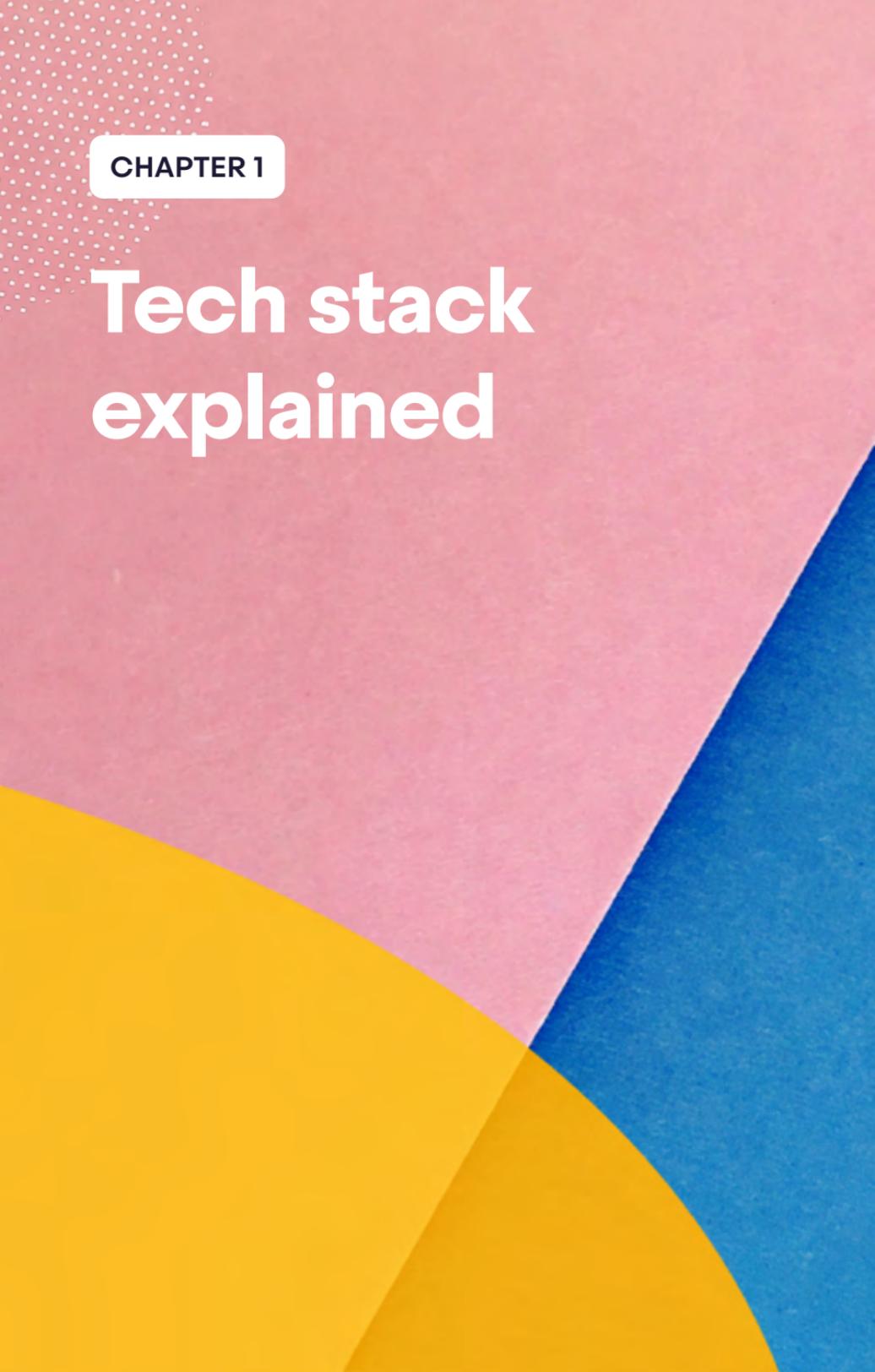
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Powerful property CRM and marketing platform
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CHAPTER 1

Tech stack explained

No matter what that changing social and economic environment brings, running an efficient real estate business is still the key to remaining competitive.

If you can complete tasks with minimal error in a short period, you will end up with more time on your hands. And having more time allows you to allocate hours to tasks that drive business growth and are of higher importance.

This is ultimately achievable by putting procedures, processes and the right technology infrastructure in place.

Your technology stacks (or tech stacks for short) plays a vital role in boosting your efficiency, as well as reducing your risk profile and margin for error.

Tech stack (NOUN)

A technology stack (or tech stack, for short) refers to a set of technologies, software, and tools that a company uses to manage its core functions.

You all have a tech stack, but for many it is an unplanned and unmanaged basket of tools that have been thrown into the blender. What makes a successful estate agency tech stack? It is focused on delivering agreed outcomes, that seamlessly connects the applications and ensures they work together (nicely).

While each tool on their own needs to be a winner in its class, it is the ability to link them all together into a single platform that will allow you to create a seamless experience for your prospects, your clients and your staff.







CHAPTER 2

The types of tools in an estate agency tech stack

Technology can help automate practically anything. The key is to work out where your team's efforts are being wasted, and where time can be freed up to spend on more cost-productive activities such as face-to-face relationship nurturing.



Tech tools for estate agencies fall into one of 8 categories:

-  **Relationship Management:** With the right tech tools, you can put things like birthday and anniversary messages on autopilot. Save your energy for phone calls and meetings when prospects are closer to needing an agent to sell their home.
-  **Social Media Content Creation and Management:** Managing social media accounts is a time-consuming activity that can stack up to hours a week. A number of tools have been developed to help you create social content and stick to a posting schedule with as little effort as possible.
-  **Lead Generation:** Digital advertising tools make capturing online leads possible. No need to engage an external marketing agency, or fiddle with any 'pixel'.
-  **Property Sales Logistics:** There are a lot of moving parts involved with buying and selling property. As the real estate agent, you're expected to be across all of them. Luckily, there are some tech tools to help you make sure nothing slips through the cracks.



Website Development and Management: Every agent needs a website, but not every agent needs to be fluent in web dev languages. It's definitely worth enlisting the help of tech tools to help you put your best foot forward online.



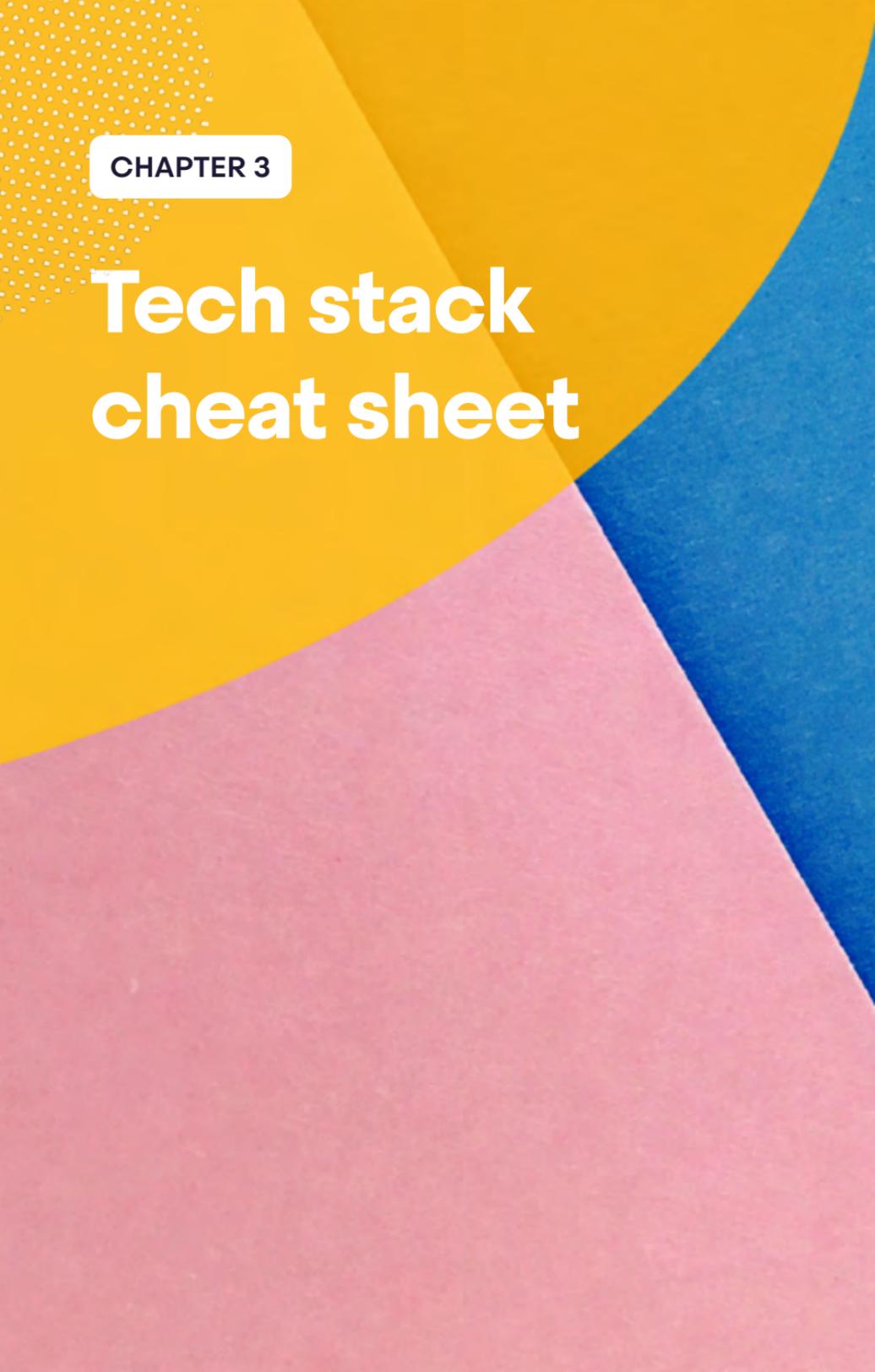
Data Analytics: Numbers help you understand if your marketing is working, where your efforts are paying off, and where they're being wasted. You can save a lot of time and energy by analysing your data. Some tools make it easier than others.



Automation: Doing more with less time is a goal for everyone - those in the property industry are no different. With an abundance of relatively new online tools available, you can automate most of those mundane tasks that drain your limited time resources everyday.



Office management: These tools keep the wheels turning.




CHAPTER 3

Tech stack cheat sheet

When it comes to curating the optimal tech stack for your agency, it's not a case of "the more, the merrier." The costs of getting your tech stack wrong can be high. It's not just the price of the technology you need to think about, but the weeks and months it takes to onboard your staff to a new product.

So, we've done the hard work for you. Here are our tried and tested tech tools for estate agencies. You can mix and match – each will work just fine on its own, but the real value comes from building a tech stack that supports every part of your business.

A decorative graphic at the bottom of the page. It features a thick, light blue curved line that starts from the bottom left and arcs towards the right. Below and to the left of this curve is a dense field of small yellow dots, which fades out towards the right.

For relationship management:



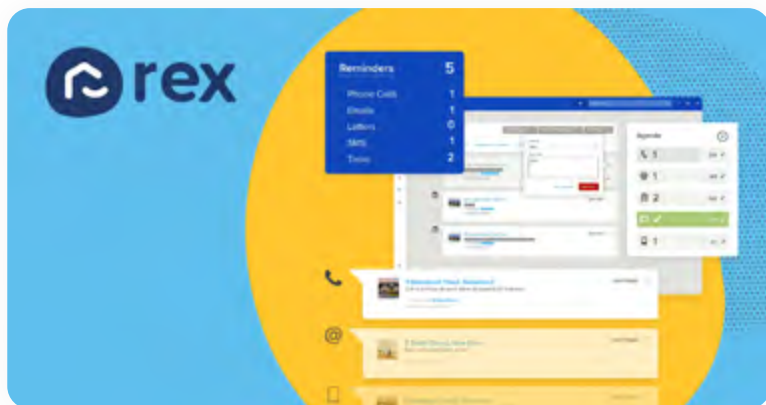
Mailchimp – <https://mailchimp.com/>

Mailchimp

MailChimp is an easy-to-use email marketing platform, perfect for estate agents just starting out. There's even a free version that allows you to manage up to 2,000 contacts and send up to 10,000 emails per month.

However, you can't separate your contacts into lists – so it's difficult to segment your contacts by area or property type, for example.

If you're just dipping your toes into the industry and haven't yet invested in a CRM, this option might be sufficient. Once you start considering an upgrade, we suggest finding a CRM that can do it all for you.



Rex – <https://www.rexsoftware.co.uk>

Rex

Rex is a Customer Relationship Management system – CRM, for short. A CRM system is a whole-of-office tool that gives estate agencies a complete understanding of all customer interactions. The goal is to create customers for life; homeowners who come back to your agency again and again, and refer business your way. A CRM can help achieve this by giving you a nudge when it's time to send a buyer their one year anniversary note, or surfacing a

seller's kids' names at just the right moment.

Rex takes this quite a few steps further and packages everything you need to nurture your relationships into automated workflows, then throws in powerful functionality like buyer match in for good measure.



BombBomb – <https://bombbomb.com/>

BombBomb

What's more personal, engaging and effective than a text? A video message!

This nifty tool helps you communicate in a much more powerful way than with words alone. With BombBomb, you can record and send videos directly to anyone from your computer or smartphone (iOS and Android) – no fancy software or cameras required. You can record yourself, your screen or both. Shoot your video off via text or email, then see who played your video and when.

For social media content creation and management:



Hootsuite – <https://hootsuite.com/>

Hootsuite

You'll want to have a presence on at least two or three platforms: Facebook, Instagram and LinkedIn, say. Remembering to post regularly is challenging, but it's an important part of being seen as an active member of your local community. The key to branding is to be consistent.

Social media management tools like Hootsuite help you to post content on a schedule. Hootsuite's free plan allows you to connect to three social media accounts and

schedule up to 30 posts per day. It will even shrink your links for you.



Canva – <https://www.canva.com/>

Canva

Canva is an easy to use graphic design platform. It comes with beautiful, customisable templates for brochures, Instagram Stories, graphics, Facebook posts... you name it. Using the simple drag-and-drop functionality, your staff can produce branded content for social media in minutes.



Animoto – <https://animoto.com/>

Animoto

Think video is just for the professionals? Think again. Animoto is a drag and drop video maker to help you stand out on social media and drive more clicks to your agency's website.

You can use it to create a property marketing video, 'behind the scenes at the agency' recruitment video, testimonial video... the choice is yours.

Animoto has been built specifically for those who don't have a lot of experience creating video. It comes out of the box with a bunch of features to help make your life easier, including ready-made templates and an extensive media library.

For lead generation:



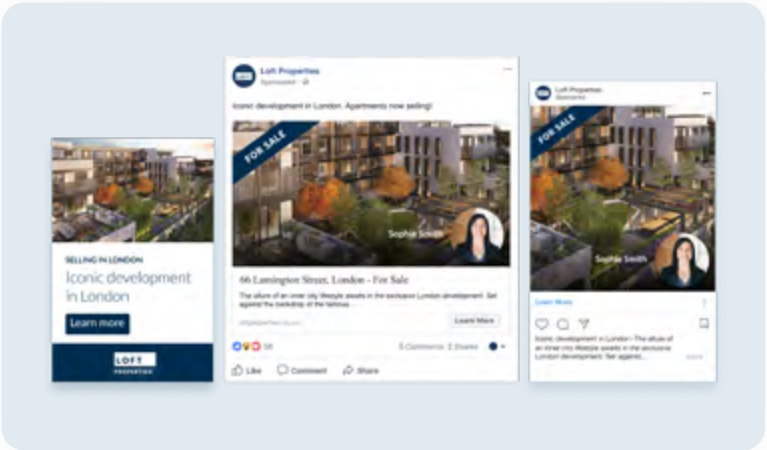
Spoke – <https://www.spokeapp.io/>

Spoke

Creating and placing ads across Facebook, Instagram and the Google Display Network takes time. A lot of it. And then you've got to optimise your ads while they're live, to make sure you're getting bang for your buck, and pull all the important data for an end of campaign report.

Spoke is a digital advertising tool specifically designed for estate agencies. Create dozens of beautiful ads for your listings, your agency and individual agents, and publish those ads to multiple networks - Facebook, Instagram and the Google Display Network - with a single click. Easily

target specific locations and pinpoint the people most likely to be interested in what you're offering. Once ads are up, Spoke's ad performance formula will continuously tweak your ads based on their performance, to ensure you're getting the most out of your marketing spend.



For website development and management:



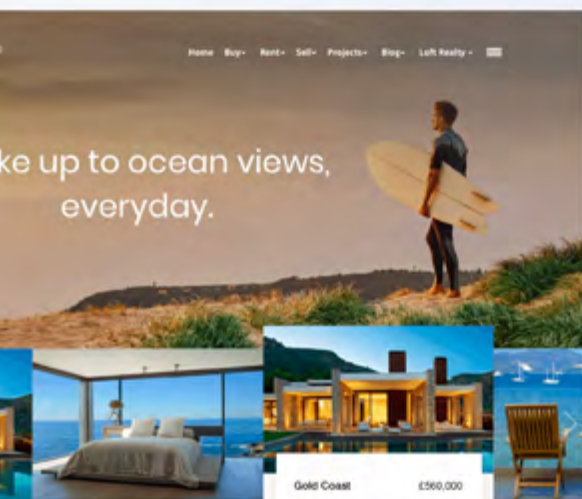
Siteloft – <https://siteloft.com/>

Siteloft

When your competition is just one click away, it's imperative you nail your online presence. Siteloft builds beautiful, responsive websites that help generate leads round the clock. Siteloft websites look and work great on every device – mobiles, tablets, desktops and more. Plus,

every design has been created to highlight your brand
boost engagement.

Siteloft seamlessly links to the Rex CRM, so you wake up to a list of fresh leads in Rex, ready to be actioned. Together, Siteloft and Rex help you capture and nurture potential clients from day dot.



For property sales logistics:

DocuSign

DocuSign – <https://www.docusign.co.uk/>

DocuSign

Gone are the days when you'd need to get a physical signature on a contract, then rush it over to the other party for signing, and then back to the office to scan it into your system. Thanks to the creation of e-signatures, you (and your clients) can do it all from a mobile phone, tablet or laptop – saving the trees and your time.

Every day, your office is dealing with offers, listing agreements, and other documents that require signatures. Include a tool like DocuSign or HelloSign into your tech stack to make everyone's lives easier. Bonus points if it integrates with your CRM system, so you can send and receive contracts all from the one spot!



SmartSearch – <https://www.smartsearch.com/>

SmartSearch

SmartSearch simplifies the entire verification process. It's fully compliant with all the regulating bodies in the UK and delivers checks in minutes – including all Sanction & PEP checks. Include it in your tech stack so you can be confident that your agency is up-to-date with the latest AML regulations.

This is another tool that easily integrates with CRM systems to help you identify high-risk applicants quickly.



HM Land Registry – <https://www.gov.uk/government/organisations/land-registry>

HM Land Registry

To properly advise a homeowner on the expected value of their property, you need to be able to see details of all property transactions associated with their address. The HM Land Registry UK House Price Index is the recognised National Statistic on house prices. You're likely using this tool already, but if you choose a CRM that integrates with it, your life will be much easier.

For automation:

Speaking about gains you obtain by automating your daily routine and business flows, we can't help but recite [KPMG](#).

Application of estate agency automation software “results in higher quality, cost savings and improved customer satisfaction” and “offers great possibilities for actors involved”.



Zapier – <https://zapier.com/>

Zapier

Ah, Zapier. This handy tech tool will help you become an ace at automating property systems, even if you don't know the first thing about coding. In fact, if you want to remove

your time-draining routine workflows completely, Zapier is your one-stop destination.

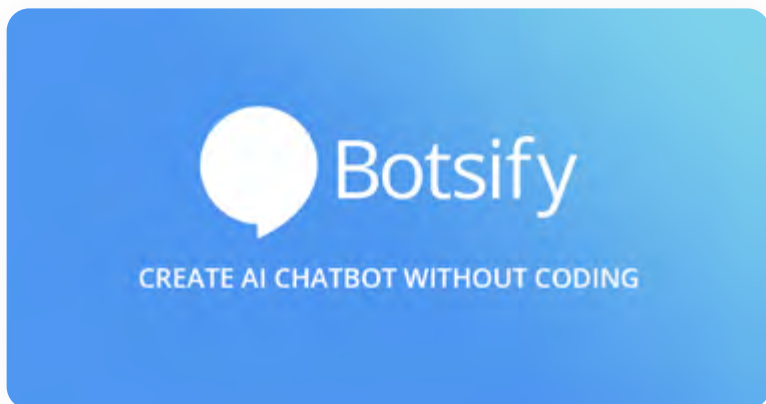
With Zapier in your tech stack you can automatically connect various software tools and apps to share new Instagram photos to Twitter, upload signed DocuSign documents to Google Drive, automatically send new leads to Google Contacts, and so much more.

The Rex / Zapier integration also lets you automate your workflows inside Rex - giving you total flexible to have your Rex CRM and marketing process set up just the way you want.

Zapier integrates with over 3,000 applications, so your automation workflows are limited only by your imagination.

Zapier alternatives: Integromat and Tray.io

Like Zapier, Integromat and Tray.io let you connect apps and automate workflows in a few clicks. Move data between apps without effort so you can focus on growing your business.



Botsify – <https://botsify.com/>

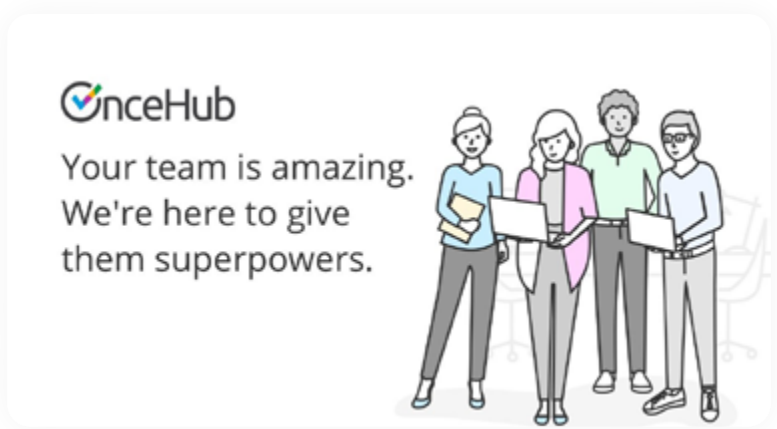
Botsify

Chatbots are rapidly changing and developing many industries including the property industry. With Botsify you can automate your website chat and generate buyer and seller leads.

The 24/7 availability of chatbots can be such a relief. Imagine, while you are on vacation, your bot is handling appointments and other tasks on your behalf without losses in quality.

Whether you want to collect leads or add a customized chat layout, these chatbot features will take your basic looking chat window to a whole lot experience that enables you to deliver awesome customer support.

You can set up Botsify to provide all the listings with quick replies. They appear as buttons.



Oncehub – <https://www.oncehub.com/>

Oncehub

Oncehub has a suite of products designed to automate the mundane. Our favourite is the ScheduleOnce app - add this widget to your website that connects with your calendar and automates the process of scheduling appointments. Save time digging through your calendar and responding to people by putting your calendar on auto-pilot.

And with COVID changing the way we work ScheduleOnce can create automatic calendar invitations and secure video links for Zoom, Microsoft Teams, Webex, Google Meet, and more.



Apple iOS Shortcuts – <https://support.apple.com/en-gb/guide/shortcuts/welcome/ios>

Apple iOS Shortcuts

The Apple's Shortcuts app can quickly and easily run a host of tasks on your Apple Watch or iOS or iPadOS device.

You probably spend a lot of time on your iPhone or iPad running one task after another across a variety of apps. Think how much time you'd save if you could automate

those tasks, or even combine them into a single action. You can do all that and more with Apple's Shortcuts app.

Offering a host of predefined actions, the Shortcuts app lets you create customized sequences or access a large gallery of existing shortcuts. After you set up a shortcut, tap it, and it will perform all the assigned tasks.



Text Expander – <https://textexpander.com/>

Text Expander

If you are looking to minimize your effort, and maximize your productivity, start thinking about all those things you are typing in regularly: your email address, your email sign-

off, or simply your website.

TextExpander boosts your productivity so you can communicate smarter, faster, and more consistently anywhere and everywhere you type.

By creating a ‘snippet’ you can quickly insert text anywhere you type. Whether it’s a short sentence or a longer, more complicated form, expand your “snippet” with a few keystrokes. With Text Expander you can reach more prospects every day by pulling from your library of proven messages with just a few keystrokes to persuade more prospects in less time.

The winning benefit here : you can use TextExpander everywhere (CRMs, email, LinkedIn, even text messages) you type.

For office management:



Notion – <https://www.notion.so/>

Notion

Many of the tech tools we've listed are focussed on improving your customer's experience – but another critical part of your business is internal communications. Knowledge management platforms such as Notion allow

your staff to share notes from team meetings, keep track of new staff FAQs, file your company playbook – the options are endless.

Who's got dibs on the office car parking spot today?

Check Notion.

What's the process for lodging sick leave? Check Notion



Slack – <https://slack.com/intl/en-gb/>

Slack

Slack is like the grown-up version of MSN. We know plenty of agencies that use WhatsApp - but a long WhatsApp thread is damn near impossible to search. Slack lets you send one-on-one messages to another user, or create group chats where teams can all discuss specific projects. You can use it to send files and documents quickly and

easily, and it keep all your messages organised and accessible, and even allows for integrations with other cloud software.

There's a desktop version, and the mobile version is a dream so you're always connected – even on the road.



Dropbox – <https://www.dropbox.com/>

Dropbox

Dropbox is a cloud storage service. That's just a fancy way of saying a place where you can upload your files and access them later, from wherever you are, on whatever device you're using. Dropbox files can be accessed with or without an Internet connection.

There are a myriad of ways you could use Dropbox in your agency. You could set it up so that, when a new person

is hired, the “Human Resources” folder containing all the onboarding and training documents automatically appears in their Dropbox. You could also use Dropbox to make sure everyone in your office is working off the latest version of marketing collateral.



Evernote – <https://evernote.com/>

Evernote

Evernote is a note-taking app that stores everything you could possibly imagine losing track of; a boarding pass, receipt, article, to-do list, or even just a note to yourself. As you move around the web, you can clip images, pieces of text, or even entire pages to a note that's your inspiration board. Or, use it as your daily journal.

The free version comes with 60MB of space, so it should do you just fine if you're only using it for notes. You could upgrade to a paid plan and use Evernote as your digital filing cabinet, but we believe your important documents should be stored in your CRM system.

Get the most out of your estate agency tech tools

Whether you're a solo agent or a team of property superstars, every tool on this list has the potential to dramatically improve your productivity.

But ultimately, it's not about choosing the best tool, the newest tool, or the coolest tool your competitors don't know about yet. Your success with any technology depends on how you use it to grow your property business.

Make sure the tools you choose organically fit into your estate agency workflows and existing systems. And if you want to take your property business to the next level, try using a sales platform with an open API to ensure that you're always able to use the right tools for your business,

no matter how it changes and evolves over time.

CHAPTER 4

The benefits of a well- integrated agency tech stack

At first glance, it might be tempting to search for or create a single solution that meets all of your agency's technology requirements. However, it is likely this will result in an in-house solution that is resource-heavy, highly costly to develop, and almost inevitably takes longer to deploy than anticipated. Integrating cross-functional platforms is difficult and time-consuming and will result in escalating costs.

A tech stack, on the other hand, is a culmination of all of the best solutions available to a business. Each piece of software will have been tested and modified to function perfectly. The lynchpin to success is making sure that each of the systems integrates perfectly.

In the past, it might have taken months and a whole dev team to integrate two systems properly. However, it has become easier and easier to integrate multiple systems using APIs and tools such as Zapier. If this is achieved then powerful performance can be reached across all of the tools within the tech stack.

If your agency can successfully implement the right tech stack the benefits will flow:



Enhanced commercial focus – focusing your tech stack around prospecting and selling activities allows you to maximize the commercial potential of your data and assets.



Increased efficiency – having the right mixture of technology removes repetitive and manual processes that take up a lot of time. A tech stack is capable of streamlining data retrieval and automating everyday tasks. The result is that the team has more time to focus on strategy and business development



Less missed opportunities – whether you are missing potential buyers and sellers because of human error, or simply slipping through the cracks, you would probably be a bit horrified to know that every day there is a pretty good chance that a couple of hot prospects have found another agent, or made an offer on a a different house. Your tech stack will help automate workflows to raise all opportunities, making sure they get the attention they deserve.



Improved relevance – the right tools will help you and your team understand how your content is being consumed. By analyzing performance and behavioral data, you can personalize communications and increase relevance. In turn, optimizing content allows you to nurture leads more effectively and, ultimately, to win more opportunities.



Happier staff, working harder, for longer – the hidden benefit of a great tech stack is that its users - your staff will be using tools that make them feel good and help them to be successful. And imagine never having to hear another complaint about

updating spreadsheets, or about the wrong reports.



Maximized asset value – digital assets are one of the most powerful tools a property firm has at its disposal. The right tech stack dramatically improves the retrieval and use of these assets by organizing and tagging them in a user-friendly way. Assets connect to other sales and marketing tools, while controls are in place to ensure correct access and usage.



CHAPTER 5

#1 top tip for a successful tech stack

While we have a bunch of great tips when it comes to thinking about updating your tech stack, it's important to remember:

- ✓ Observe what others are doing
- ✓ Walk before you run
- ✓ Define a 5 year direction
- ✓ Budget and plan for growth
- ✓ Strengthen your core (database)
- ✓ Assess all outside costs, but move forward

Our number one top tip is:

Whichever tech tools you go with, the number one thing you need to ask is:

do they play nice with others?



Your CRM should be your base; your single point of truth.

We call it your SPOT.

But for your CRM to be your SPOT, it needs to have a comprehensive and open API so that it can interact with internal and external systems your agency uses. API is short for Application Programming Interface – but it's one of those acronyms that doesn't really explain what it is. Essentially, it allows for two way data flow between systems.

Your system should let you build integrations with the tools in your tech stack, as well as chatbots, automatic responders and other tools unique to your business, too. Your CRM should be your one platform for digital marketing, document management and more.

When you choose a CRM with an Open API, you'll streamline your processes, save hours of double data handling and build better relationships

Looking to transform your tech stack? We can help.

Reach out to our team at uksales@rexsoftware.co.uk to learn how we can help your agency build a tech stack that amplifies your agents, supports your admin, and helps provide customers with an exceptional experience.

A successful estate agency tech stack always includes a foundational cloud-based CRM that is complemented by a mobile app suite. This means that while you're in the office you have the tools you need to get work done, and also when you're on the road you have those same tools, too.

Moving from manual processes to automated platforms means that you immediately take your business into the future – this has tremendous benefits for your bottom line, staff output and margin for growth.

Rex Software delivers on both these points and has been designed to be the backbone of your technology stack. With its long list of built-in native integrations, and new-released Zapier integration you can build a seamless real estate business approach from prospecting to contract management and the subsequent management of a life-long relationship.

When connected to our other tools, Siteloft (estate agency website-as-a-service) and Spoke (digital advertising) your lead generation activities for both buyers and sellers will be on steroids.

If you want to talk about your estate agency tech stack, and how we help you build a listing and selling machine, reach out to our team at uksales@rexsoftware.co.uk. We can show you how other really successful agencies have upgraded their tech stack to align with their business goals, streamlined their internal processes and got more work done faster.

With the increase in time, how could you drive revenue and grow your business?



**Powerful property CRM and
marketing platform**

rexsoftware.co.uk

rexlabs.
a rexlabs product