



Complete Overview of Wise Agent [Best Real Estate CRM 2018]

Wise Agent CRM helps Realtors make more Money, and save Time by automating their leads, responses, appointments, and transactions.

Wise Agent was founded in 2002 with a mission dedicated to innovating and developing the best CRM in the real estate industry, backed up with amazing customer support to give our members one platform to run and organize every aspect of their business.



We value building deep, long-lasting partner relationships to integrate other technologies into our real estate sales CRM system.

We strive to continually enhance our platform and increase the productivity of our customers.

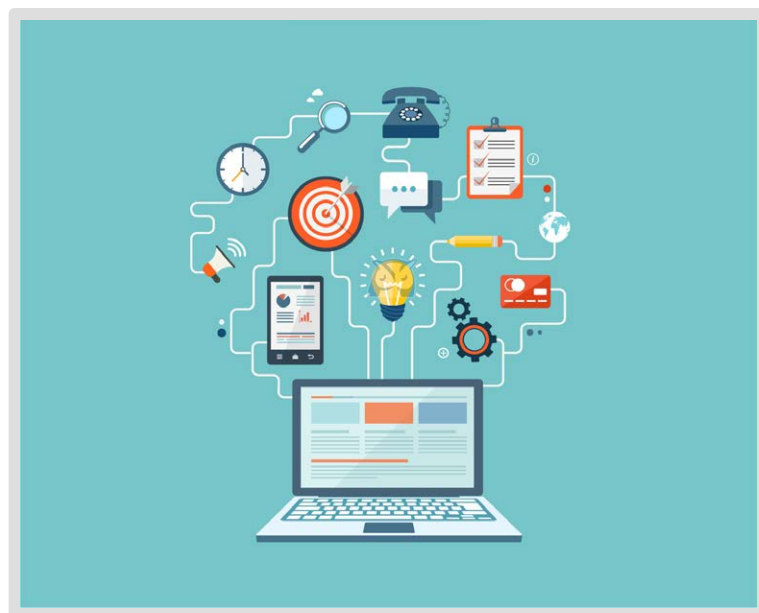
We do it all from an uplifting and productive work environment, that allows our employees to learn and grow daily.

We designed Wise Agent to be very easy for anyone to use, so don't get overwhelmed. It will be easier than you think once you get started.

Before you jump in and start training, it is a good idea to see an overview of the entire program so that you have an idea of what to expect and better decide your personalized training path.

The intent of this article is not to train you on how to use your new real estate client management system, but more of a synopsis so that you will know what features are available.

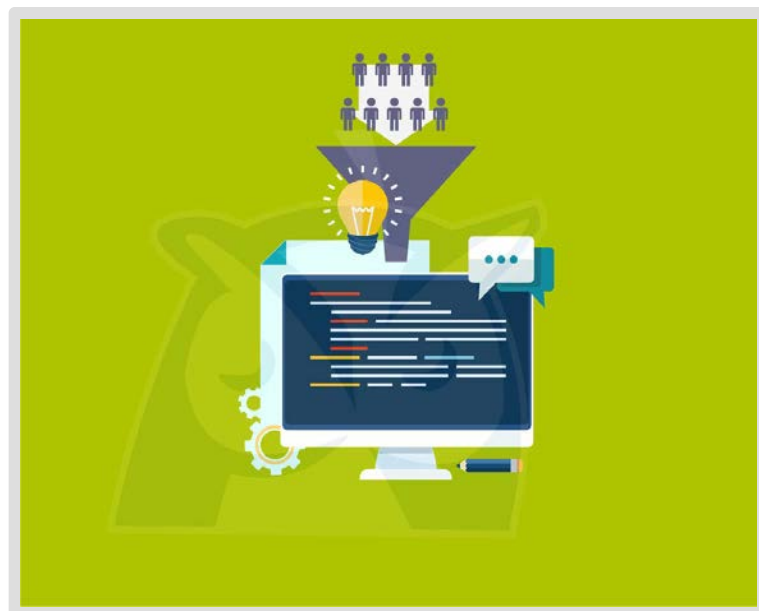
Then, you can implement them into your business, and find what sets our tools apart from the others. Wise Agent is very proud to be chosen as the best CRM software for real estate agents 2017, winning the Battle of the CRM's (hosted by [BombBomb](#)), according to agent votes.



Contact Management

The core function of a CRM is Contact Management and just like your business revolves around your contacts, Wise Agent was built to revolve around our extremely powerful real estate contact management software system.

We give you the ability to segment your database by Source (where you found the client) and as many Categories as you need.



You can track and search all the basic fields that you can on every other CRM, but in Wise Agent you also have the option to use many unique fields such as rank, status, additional addresses, spouse info, childrens' birthdays, and even pets' names.

We understand in real estate if you go to a listing appointment and know your clients' favorite dog's name, it gives you a much higher chance of building a lasting relationship and winning the listing.

Lead Management

Follow up like a boss using our real estate lead management system!

Wise Agent Lead Management System has been turning many heads and getting a lot of attention as more real estate agents and offices realize how powerful of a feature it has become.

At the same time, it remains very simple to set up and easy to use. While many real



estate lead management systems are set up to launch auto-replies and drip campaigns, most are very limited in choices.

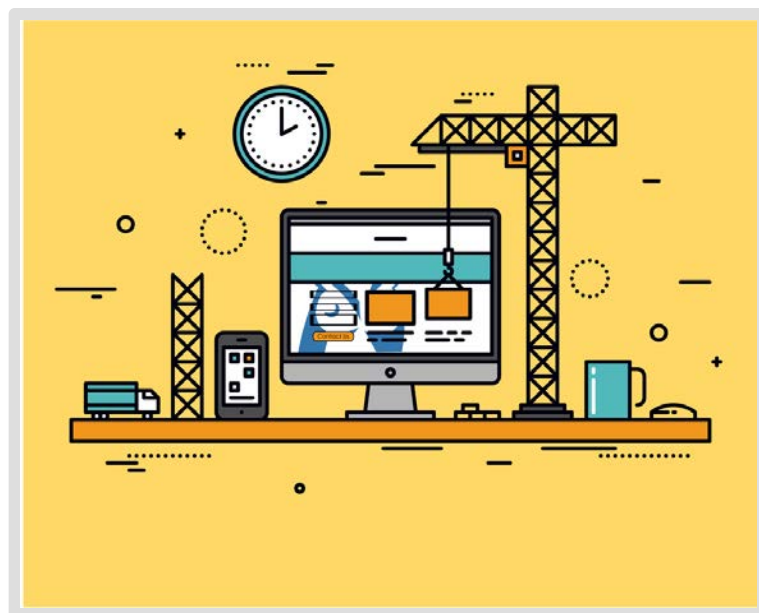
Wise Agent Lead Management System is customizable and makes it possible to split or A/B test. You are also able to set up different rules for different lead sources.

Each lead from a certain lead source can launch a unique real estate drip campaign designed specifically for that source.

The new leads can automatically be added to the daily Call List, which is another hit feature we will discuss here.

You are also able to pre-categorize all of your incoming leads. For instance, if you are targeting buyers in a certain ad, all the leads produced from that ad can automatically be put under the category of “buyers”.

As soon as a new real estate lead comes in, you can have it set to fire off an immediate email that uses the lead's name and source in the email.



You can even include a Youtube video that was made specifically for the lead source! If you like using video, you will be happy to know we have also built in a robust integration with BombBomb, allowing you to send immediate BombBomb videos to your new leads.

Emails and phone calls are still a must in today's lead conversion process, but the number one tactic Wise Agent members have been using to convert more leads is the implementation of our Wise Text feature.

Each new lead can receive a personalized SMS text message that uses the lead name and source name in the text message. Wise Text is an extremely powerful real estate marketing and conversion tool as we are currently seeing a 100% open rate and many replies almost immediately.

The Wise Agent Lead Management System can also easily be set up to notify you and as many of your team members as needed via sms text and/or email once that new lead comes in.

Brokers and team leaders who are generating large amounts of leads love Wise Agent's simple lead distribution system that

allows the lead to be distributed several, or a combination of, ways - day of the week, zip code, price range, round-robin, or even via a "claim a lead" option where the first team member in can claim any unclaimed leads.

Wise Agent Lead Management software also includes several different lead reports that can be generated to show what sources leads are coming from, status and rank of leads, and how many leads were assigned to team members.

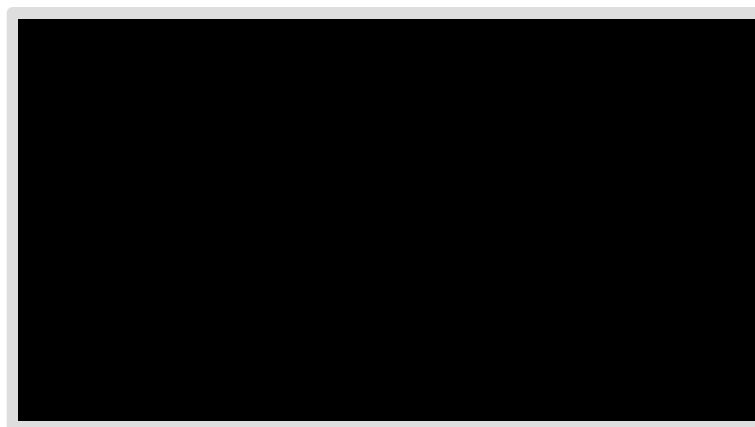
When discussing lead management for Realtors, the next question that usually comes up is: "where are real estate leads for Realtors coming from and how do I get those leads into my CRM?"

Today there are over a hundred different companies in the real estate industry that focus on generating leads and selling those leads to Realtors.

Internet leads are coming from large-brand, well known companies like [Realtor.com](#) and [Zillow](#), as well as companies like [Listings to Leads](#) or [Lending Tree](#), and many, many, others.

Another effective and popular method for agents is to place ads on social media. This generates a large amounts of leads, and Wise Agent captures them seamlessly. More traditional leads coming from walk-in's, open houses, and floor calls can also be organized easily.

The important thing to know is that it really doesn't matter where your leads are coming from, Wise Agent has a way of getting all leads to automatically show up in your CRM. There are a



few different methods used, from following an API to parsing the leads in, and the Wise Agent customer support team will be standing by to help get your leads set up to flow in seamlessly.

Transaction Management System

Wise Agent's real estate transaction management software is another major piece of the puzzle that we have included in this all-in-one CRM system for Realtors.

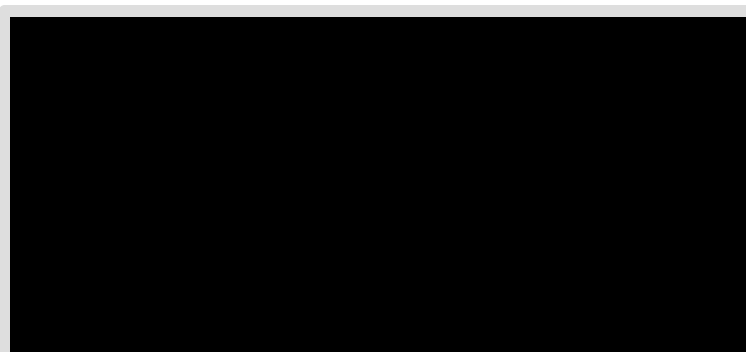
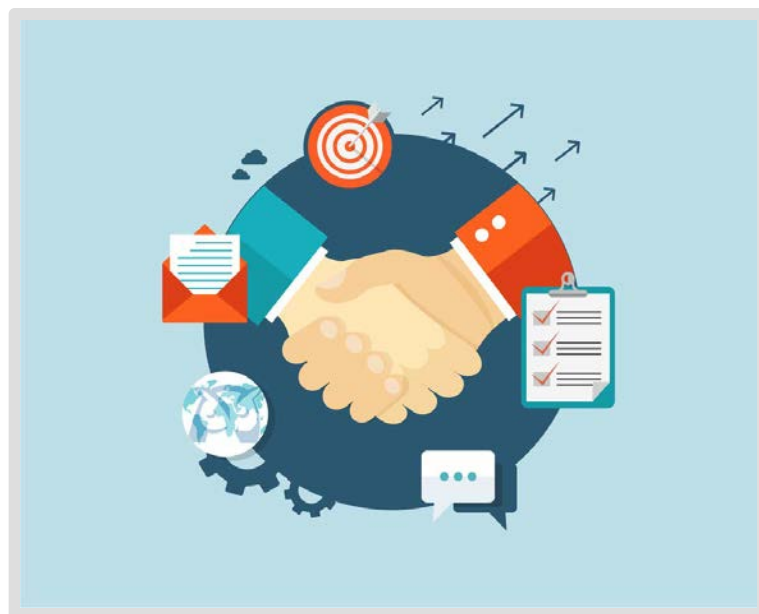
Using the lead management system and our other business tools will lead to growth in your business, therefore increasing the number of transactions that need to be organized and managed.

Wise Agent makes it simple to customize a buyer or listing template, which can be turned into a real estate transaction management checklist for each new buyer or seller.

Every transaction will be associated with a well thought out checklist that guides you through the entire transaction and records every action, from the very beginning to a successful closing.

Realtors love that our real estate transaction management checklists show all the information on one single page.

Simply scroll down to see the critical date list, each task that needs to be completed with due dates, information for every person or company that has a role in the transaction, unlimited document storage, and date and time stamped notes.



Wise Agent is integrated with [DocuSign](#) to easily save digitally signed real estate forms. The Transaction Hot List will appear on the homepage with fast, one-click access to each current transaction.

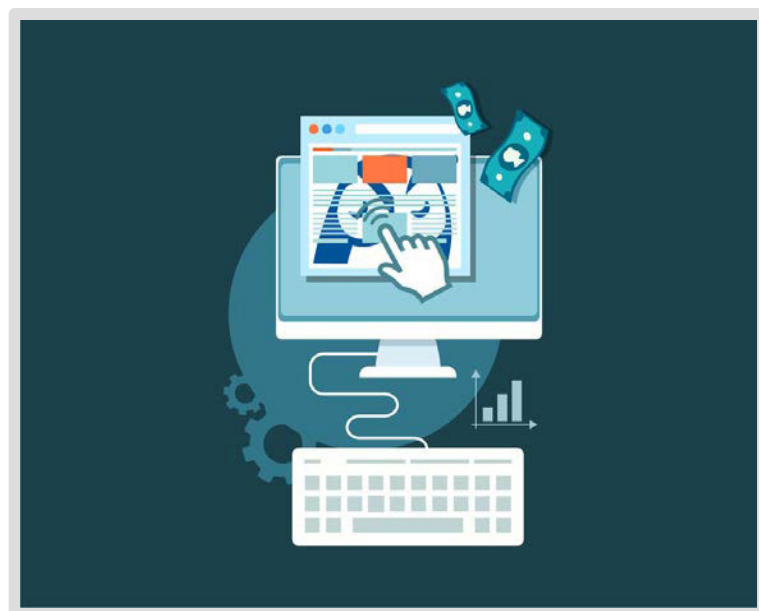
Our real estate transaction management system is also very team friendly, helping brokers and team leaders monitor the progress of each sale.

Landing Pages

When discussing real estate lead generation software, the topic of landing pages always comes up, as landing pages for real estate play a major role in capturing leads.

A landing page can be any webpage that was designed for a single purpose which a visitor may “land” on.

In Wise Agent, some examples of landing pages we see often would be single property websites, pages designed for a marketing call-to-action ad, and Open House sign in sheets.



Wise Agent offers a very powerful landing page platform with many easy to customize real estate landing page templates to get you started.

You may choose your own domains for your landing pages, or use one that is assigned. Pages are ready to be used anywhere on the internet within minutes.

Wise Agent

Automate Your Business
Save Time
Make More Money

Free 30 Day Trial

The diagram illustrates a 7-step CRM process: REPORT (green arrow), MANAGE (light blue arrow), CATEGORIZE (medium blue arrow), NURTURE (purple arrow), AUTO RESPONSE (dark purple arrow), CONVERT (orange arrow), and DISTRIBUTE (yellow arrow). The arrows are arranged in a circular path, with 'CONVERT' and 'DISTRIBUTE' pointing towards the center.



Call List

Directly under the Recent Leads box on top left of homepage you will find the Call List.

We put it right on the top because making your phone calls is such a critical part of growing your real estate business. Wise Agent's Call List is designed to work great for teams or individuals.

Upon logging in, you are immediately able to see everyone you need to call today.



To the right of each contact is a phone icon that will open a modal with the contact's information.

Before making your calls, you can easily view past notes - ensuring you are fresh on your last interaction, and what the goal of this call will be.

It is then very easy to add notes about your call and schedule the next follow up call.

The Call List also features reports that show how many calls were assigned to each team member and how many were actually completed.

For those doing mass calls we have partnered with [Mojo auto dialer](#) system, providing a seamless integration for our members.

Calendar

"If it's not on your schedule it doesn't exist."

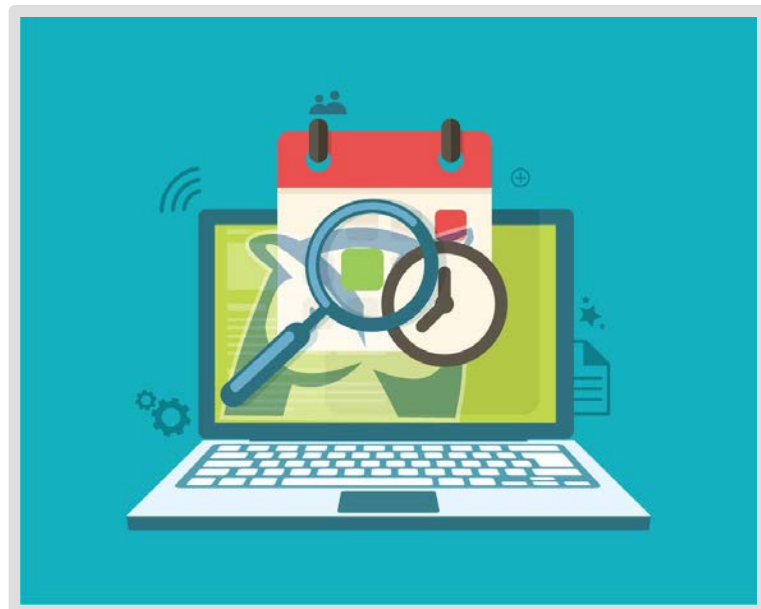
Wise Agent offers a very powerful and easy-to-use real estate team friendly day planner that syncs perfectly with your mobile device via [Google Calendar](#).

While it has all the basic functions of most online calendars, many members love the fact that they can associate appointments with contacts and vendors and the system will automatically add notes to the appropriate contacts.

You can also attach files, like questionnaires or agendas, to calendar events, which is a very unique feature that many members enjoy using.

The Wise Agent day planner sends out thousands of text and email alerts each day to help Realtors stay on time and never miss an appointment.

It is also very easy to see calendar reports that show how many appointments each team member is scheduling and completing.



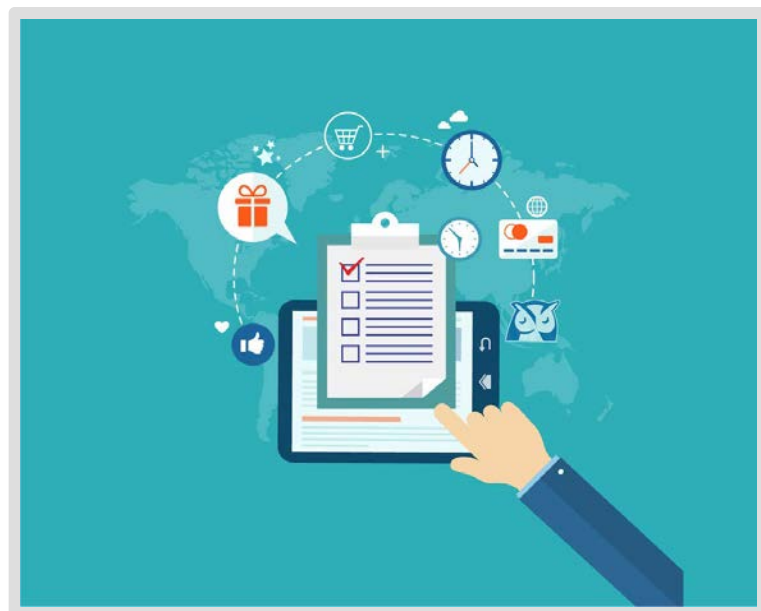
Task List / To Do List

“Wise Agent offers a smart, team-friendly, task list that is simple to use yet packed with features.”

Not only can you label each task with an estimated time needed and set a priority, but you can also send text and email alerts to

multiple team members.

Wise Agent's task list works seamlessly with our real estate transaction management software for those Realtors who prefer to have tasks from transactions show up on the task list at given times.



Every task can be associated with a contact which will automatically add to their contact notes. It is very easy to search and find past due, today's, and future tasks, or filter by team member or by associated transaction checklist.

Many members compliment the fact that Wise Agent's task list also gives you the ability to pull task list reports, making it easy to see how many tasks each team member has assigned compared to the number of completed tasks.

Recent Leads

Regardless of whether your real estate leads are coming from landing pages you created on Wise Agent or any other lead source, the most recent leads will always show on your Wise Agent home page at the top left to alert you as soon as you login.

This is just another way that Wise Agent's real estate lead management program will help to keep your leads from slipping through the cracks.

Drip Campaigns

Wise Agent includes a very intelligent lead-nurturing real estate drip marketing automation system.

Once again, Wise Agent makes it easy to start as we offer many pre-written real estate email marketing stock templates that can be customized within minutes.

If you are in need of real estate drip campaign ideas, just take a look through our stock programs. You may choose the number of events and decide how many days in between each event.

Both short term or long term real estate drip campaigns can be created and ready to go in minutes.

Wise Agent real estate email drip campaigns are also built into the Lead Management system so that new leads can automatically be added to your drip marketing programs based on the source of each lead.

Drip marketing campaign reports are also available.

Letters

Included with each Wise Agent account is a real estate letters library to use in all the different situations you encounter.

There is an extensive list of stock real estate letters that can be edited and saved as your own.

The letter manager also includes an address label tool, or you have the option of printing the address right on the envelope.

All letters are designed for snail mail, email, or can be used to create a drip campaign. If you are using the [Dave Beson Letter Writer](#) series action plans, you will be happy to know that we have integrated Dave's letters to make them easy to send using Wise

Agent CRM tools.

Drip marketing campaign reports are also available.

Real Estate Newsletters

Many Wise Agent members have been quoted saying this one feature is worth the price of the product.

In less than a minute the newsletter can be emailed to your entire client database.

You also have the option of using the real estate newsletter templates to create your own custom newsletters. You can edit any part of the monthly stock newsletters or add pages to them.

Many Wise Agent members add their current listings to the monthly real estate email newsletters, too.

Wise Agent's real estate marketing newsletters are also printable if needed.

For those that would rather have branded newsletters printed and mailed directly to your clients' and prospects' homes each month automatically, Wise Agent has you covered. We partnered with [Market Connections](#) for this purpose; they have beautiful branded newsletters that go out in a see-through envelope showing your branding on both sides for a big impact.

Real Estate Flyers

Real Estate Flyers When you think of real estate agent marketing tools, one of the originals and still most used is real estate flyers.

Choose the style of flyer you want and walk through the step-by-step guide to create your own flyers.

Email

Wise Agent has been referred to as the best real estate marketing CRM often in reviews, and a major part of that is our powerful email system that allows you to send personalized mass email to your database or a scheduled email to an individual contact.

There are many real estate email marketing templates for real estate agents available to help spice up your emails and give you marketing ideas when you know you need to send something but can't think of what to send.

Additionally, we have included an integration with YouTube to make it easy for you to send your videos by email.

Wise Agent also has an API integration with both MailChimp and Constant Contact if you prefer to send mass mail through either of their platforms.

Email Branding

There are many powerful real estate email signature templates available to choose from, or you can copy and paste your personal email signature from another system.

You can also easily make one from scratch. Another bonus is the fact that you can create and save as many real estate email signatures as needed, for yourself or your team members.

Wise SMS Text

Adding the ability to send text messages though the CRM has been a game-changer for many Realtors using Wise Agent.

With Wise Agent you can now set up an auto response text that will send an automated text message response immediately to all new real estate leads as they come in. You can also use Wise Text for mass text messaging if you need to send a bulk text message blast to a group.

Social Media Enhancements

Artificial Intelligence is here and will continue to be integrated more and more into CRM's.

Wise Agent CRM includes a social media enhancement that will search and immediately return any social media profile information including an image that is found using the contacts email address.

This enhancement will happen automatically for all new leads being added to Wise Agent.

Many times, a new lead will come in as a partial lead with no information other than an email address. Within seconds, Wise Agent is able to add a picture, first name, last name, company, job title, city, state, and provide links to the social media networks the lead email is connected with.

Mobile Web App

Wise Agent CRM makes it easy to manage your business from anywhere with our mobile web app.

The user-friendly interface makes it easy to view, add, and update your CRM with just a swipe of your finger.

Wise Agent app will work on any mobile device simply by opening a browser and going to www.wiseagent.com.

There is also a link on the mobile app to the standard site for anything not covered in the app. [Wise Agent](#) has been designed to be responsive so the entire system can be worked on from a mobile device.

Real Estate Reports

Track the number of calls, tasks, or appointments your team is scheduling vs. completing.

See which lead sources are are converting best, and how many leads are coming in from each source.

Email reports will allow you to see delivery reports including the number of opens. There are also SMS text reports available.

Real Estate News

With many Realtors organizing every part of their real estate business in Wise Agent, they end up spending a lot of time in our real estate CRM.

Several agents suggested that it would be nice if they could have access to the latest real estate blogs from within their real estate CRM software.

We listen to our members, and now you can pull in and view any RSS blog feeds you like to read right into your Wise Agent dashboard.

This can be used as an awesome real estate marketing tool too, because you can also pull daily blogs your clients may find valuable. Providing real value in your communications with

contacts will help set you apart as the expert for all their real estate needs.

Team Friendly CRM

Many are saying Wise Agent is the best real estate CRM in 2018, and one reason is because so many are moving away from being a single agent and towards forming a team.

Wise Agent was built for a single agent to use, but has now become one of the top CRM's for real estate teams because it is so team-friendly and works with teams structured many different ways.

There is no limit to the number of team members that can be added, and you have the ability to turn on permissions for anyone on your team. With this model, the team leader can decide what each team member can see or do within the CRM, and give each team member limited access based on their needs.

Team Notifications

Wise Agent is very team-friendly and works for teams that are structured many different ways.

You may link one Wise Agent account to as many other accounts as needed, making it very easy to share events and contacts to other accounts, while also notifying the receiver.

Team Permissions

Regardless of how your real estate team is structured, Wise Agent's team friendly CRM will work for you.

As the team leader or account owner you can decide what each person's experience will be when they login to Wise Agent.

While your assistant may be able to see and do everything, you may decide to set permissions for your buyers agent that allows them only to see their own leads, calendar, and tasks.

There are many different team permissions available for you to determine exactly what each person on your team has access to.

Referral Tree

Many Realtors have done very well focusing their marketing and business-building efforts on referrals.

Now it is easy to see how many leads each contact has referred to you, how many of those leads have referred someone else to you, and so on.

Integrated Partners

Another way that Wise Agent CRM sets itself apart from the competition is our long history of deep partnerships with other top technology companies.

We understand that there are many other technology systems you use for your success and anytime it makes sense, we want you to be able to access and use that other technology in one place - your CRM.

For instance, from a contact summary page, with one click you can send a beautiful CMA from our integrated partner Cloud CMA without ever leaving Wise Agent. We are proud to have a deep integration partnership with [zipForm® Plus](#) and many other tech companies you will recognize.

Several of our Realtor CRM systems competitors use a 3rd party app named Zapier to claim they are integrated with many other services.

While Wise Agent is integrated with Zapier, we feel it should only be used as a last resort when it isn't possible to have a direct integration without a 3rd party in the mix.

Many real estate agents are looking for a real estate CRM that integrates with Google and Gmail and they finally find what they want when they try Wise Agent. Here is a list of the most popular *integrated partners*.

Integrations Menu

Another big part of integrating with technology partners around the industry is making it easy for the end-user to connect both software systems together without a big hassle.

Wise Agent CRM has a page called the Integration Menu from which our members can easily sync their CRM with Google Calendar, Google Contacts, Twitter, Gmail etc. in a few seconds.

Twitter Feed Reader

Wise Agent CRM is proud to have a deep API integration with Twitter.

Many Realtors have found that using twitter for business can really be a powerful tool.

This integration can be found at the bottom of each Contact Summary page.

As soon as a new lead comes in the name and email are cross-referenced in Twitter. If we find a match, it is immediately linked to your Wise Agent account.

Gmail Conversations

With a very large portion of real estate agents using Gmail, it only made sense to spend some time integrating Gmail conversations into Wise Agent.

Once activated it allows you to see all gmail conversations, even from the past, on your contact summary page.

Not only can you view email strings but the integration also makes it easy to permanently save an email conversation to your contact notes. If the email includes an attachment, you can save it to your Wise Agent unlimited document storage with a click.

Chrome Gmail Extension

By far one of our favorite and most used add ons is the WordPress Lead Capture Forms.

This one is a big time saver!

Once installed it adds an “Add to Wise Agent” button at the top of your Gmail.

Now, anytime you get an email from anyone that should be in your CRM, you can simply click the button and easily add the contact with their important information to Wise Agent without ever leaving your Gmail.

WordPress Lead Capture Forms

For those of you using WordPress that would like to add lead capture forms to any of your WordPress pages, we have you covered too.

Wise Agent has a very easy-to-use [Lead Capture WordPress Plugin](#) that can be used on your WordPress site.

Most of the lead generation systems out today direct the leads to a landing page to

capture the lead information.

Real estate lead capture landing pages have become very necessary when marketing, but many real estate agents have had struggles trying to create landing pages and set them up to communicate with a CRM.

Property List

In Wise Agent CRM there is also a convenient real estate property list where you can keep all the details of any properties you work on.

You can store all the information about a property as well as keep detailed property notes. It also allows you to create property categories to help you stay organized.

There is also a real estate slideshow maker on the property page that will create a

slideshow that is easy to use and link to as soon as you add multiple property pictures.

Lockbox List

Do you need a place to organize and track your real estate lockboxes?

Wise Agent includes a simple real estate lockbox list that makes it easy to track every serial number, shackle code, and location of each lockbox you own.

Real Estate Calculators

There is even a page in Wise Agent that has common real estate calculators in English & Spanish.

You will find an amortization calculator, debt consolidation calculator, early payoff calculator, home affordability calculator, and a refinance home savings calculator.

Send vCards

Do you like to share contacts' information by sending a vCard?

Links

To track your real estate resources in one place, there is a real estate website link page that has many real estate agent resources already listed for you to access.

Education Tracking

Real Estate continuing education requirements make it mandatory for all Realtors to continually take classes and keep up to date with our fast moving-industry.

In Wise Agent there is a place to track what classes you need with due dates, and record details on each class you take with completed dates so you never have to cram at the last minute to maintain your license.

Accounting Tax Help

There is a lightweight real estate business expense tracker and mileage tracker available in Wise Agent to help with your accounting.

You can track expenses and mileage and pull a tax report or mileage report at anytime.

Settings

Take a few minutes when you are getting started to go through all the settings and customize your CRM experience.

Customer Support

Wise Agent CRM has always set itself apart from the crowd by offering the best customer support in the entire real estate industry.

Wise Agent is the only company in the industry with 24 hour support that includes weekends and holidays.

Wise Agent does not outsource support, so anytime our members need help, one of our award-winning support team members will be standing by!

30 Days Full-Access FREE, no credit card required.


Then Only Pay \$29.00 Per Month, no contracts required.


[Free Trial](#)



Wise Agent CRM helps Realtors make more Money, and save Time by automating their leads, responses, appointments, and transactions.

[Q Our Story](#)

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