RealtyJuggler™

RealtyJuggler
Goals

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RealOrganized™, Inc.

Organizational Software for Real Estate

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Main:Goals

Your deal pipeline starts with new Prospects and ends with completed Closings. In between are a number of steps that must be completed in order for a Prospect to become a closed deal. The Goals section of RealtyJuggler allows you to track the health of your deal pipeline and also to set specific goals.

There are several icons in the **Main:Goals** section. Each icon contains information useful for both planning and tracking purposes. This data is generated automatically based upon information entered into RealtyJuggler. This means that this section of RealtyJuggler will only be useful after several months of using RealtyJuggler. Once enough data has been gathered, you will be able to track your progress and rate of success at each stage of the deal pipeline.

Make sure to follow the normal flow of a deal. A fresh lead starts out as a Prospect (or a Contact). Once they agree to become a client, you would transfer the Prospect to the Buyer or Listing database. Once you have a Ratified contract, transfer the Buyer or Listing to the Closings database.

Video Tutorial 20 - Starting a Deal has a more detailed description of this process and the likely variations.

If the deal falls through, change the Status of the Closing record from "Contract" to "Cancelled". Once the deal has been completed, change the status of the Closing record to "Completed". The AutoTasks located at **Main:All Tasks** will guide you through this deal process. Video Tutorial 38 and 39 have a detailed explanation of how the AutoTasks can be used to work through the flow of a deal.

Office Hours

We highly recommend that you schedule regular time each week to proactively prospect and use RealtyJuggler to generate business. One of the most powerful ways to use RealtyJuggler is a daily follow-up with past clients and new prospects.

Video Tutorial 44 - Touch Cycle has information on how to track Birthdays, Anniversaries, and build a daily call list.

Last Contact Date

Contacts, Prospects and other deal records maintain a last contact date for each
person. This is the last time you contacted them in any way (phone, email,
postal mail, drop-by etc.). There are several ways that this date is
automatically updated:
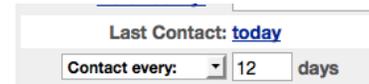
- If you use the Touch Cycle and mark the touch task as done, the last contact date will be updated.
- If you have a Birthday or Anniversary reminder, we will update the last contact date when those tasks are marked done.
- If you assign an email or printed drip sequence for someone, the last contact date for that person will automatically be updated when the letter is printed or emailed.
- Using **Main:Mail:Mass Print Letters** can update the last contact date if you select the "Progress Note:" drop-down menu option.
- Using **Main:Mail:Bulk Email** will update the last contact date automatically once the email has been sent.
- Printing mailing labels will **not** update the last contact date. However, you can update last contact date for a category of records using the "Select Multiple Rows" link at the top of the Contacts of Prospects lists.
- You can also update the last contact date by hand by clicking on the Date to the right of the Last Contact Date: field inside of the detail view of the record in RealtyJuggler.

The last contact date allows you to track how fresh your Contacts and Prospects database is. One easy way of seeing the people who have the oldest last contact date is by clicking on the column title "Last Contact" from the **Main:Contacts** or **Main:Prospects** screens.

Maintaining Contact with Your Sphere

Your sphere of influence contains the Contacts that you maintain regular communication with. They could be past clients, friends, and anyone who might eventually buy or sell or who might recommend you to others who might buy or sell. Most trainers recommend keeping in regular contact with each person on your sphere with a combination of phone called, emails, printed letters, and postcards. RealtyJuggler can help you maintain this regular communication. In addition to basic idle chitchat, the purpose of your communication is to remind your friend that you are still selling real estate and "Oh, by the way, if you know anyone who might be buying or selling real-estate, I would be honored to help." Since real estate is all about being in the right place at the right time, if someone asks the question "Do you know of a good real estate agent?" your name should come up.

Maintaining contact with your sphere can be achieved in several ways. Below are listed some of the most popular techniques:

Christmas Cards

Send a yearly Christmas mailing. This mailing could be a Christmas card or perhaps a printed calendar with your contact information on it.

YouTube **Video Tutorial 41 - Advanced Categories** shows how to prepare and print this mailing.

We recommend sending Christmas cards via postal mail. The advantage of this is twofold - something sent via postal mail is more effective than an email and the postal service will return your card as undeliverable if the person has moved. This second advantage is particularly valuable in maintaining and keeping a good clean contacts database. If someone has moved and they didn't use you as their agent, that's a good hint to remove them from your database. Being effective means knowing where to focus your efforts and keeping a good clean database will help you stay focused.

Setting Last Contact Date for Printing Envelopes/Labels

Select **multiple rows**   To update your last contact date for people you have printed mailing labels for, go to **Main:Contacts** and select the "Show Category:" drop-down to select the contacts that you sent your mailing to. Click on the "Select Multiple Rows" link at the top of the screen. A "Do Multiple" menu will appear. Check off the first checkbox in the list, which will check off all of the records. Select from the Do Multiple menu the "Set Last Contact Date To Today". That will update the last contact date for those records to today.

Touch Cycle
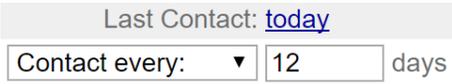
Last Contact: today
Contact every: ▼ 12 days   RealtyJuggler Contacts and prospects have a field **Contact Every xx Days** which can be used to remind you to contact that person periodically. You can decide how you want to make contact based upon specific circumstances. Perhaps a phone call is best, or perhaps sending a postcard, or even dropping by and saying "Hi". In any case, just mark the task as done and the last contact date for the contact record is automatically updated. The best way to see how this works is to review **Video Tutorial 44 - Touch Cycle**.

Wishing a Happy B-Day

RealtyJuggler allows you to track the annual birthday for your contacts database as well as up to 8 additional family members per contact record. This is an excellent stress-free way of touching a past client. Video tutorial 44 - Touch Cycle shows how you can do this. You can either send a Birthday card or make a phone call. In either case, when you mark the AutoTask done, the Last Contact date is updated automatically.

Closing Anniversary

Closing Anniversary ▼ ▼ Dec 1
for: 12 Main Street (1999)

For Past Clients who you have helped purchase a home for, a tremendously effective way to stay in contact is to call or send a postcard on the anniversary date of the home closing. Video tutorial 44 - Touch Cycle shows how you can do this.

Drip Letter/Email Sequences

You can apply a drip sequence to a contact record. If the sequence is to be sent via email they are automatically sent at the scheduled date and time. If the letters are to be printed, you would go to **Main:Mail:Print Pending Mail** and periodically print the letters that are schedule to go out. In either case the last Contact date is automatically updated once the email has been sent or the letter printed.

Video Tutorial 14 - Drip Email/Letter Sequences shows how to apply a drip email or letter sequence to a Contact or Prospect.

Bulk Emails

You can send a bulk email to a group of Contact records. This email might be information about market conditions or a seasonal greeting. In either case, the email can be mail merged with the contacts name and will automatically update the Last Contact date for the person.

Video Tutorial 42 - Bulk Email shows how to send bulk emails using RealtyJuggler.

Contacts vs Prospects

Touching your Contacts is normally done on a relationship basis. You are a friend who happens to be a real estate agent. You are just as likely to talk with someone in your Contacts database about the latest sports teams as real estate. For the Prospects database, you are marketing to strangers. You have a strong indication that your lead is looking to buy or sell and you are aggressively promoting yourself as the best agent for the job.

RealtyJuggler comes with dozens of drip sequences specifically crafted for different prospecting. There are letter sequences for new homebuyers, short sales, empty nesters and more. To see what letters are available in the library, go to **Main:Mail** and scroll to the bottom of that screen. There's a link with the full text of the letter library. Video Tutorials 14 and 17 show how to use these drip sequences. You can apply drip sequences either for printed letters or for email sequences; depending on what contact information you have available.

A second common strategy for Prospects is to touch them frequently. Enter the "Contact Every xx days" field with a shorter duration than for contacts. For example, you might use a value of every 90 days for a contact but a value of every 8 days for a prospect record.

Prospect records are most effective when they are fresh and when you regularly touch them. For these reasons, we recommend that you attempt to contact your Prospects in as many unique ways as possible, as often as possible. If you are lucky enough to have both a mailing address and an email address, contact your prospect using both. If you have a phone number, call your Prospect. Drop by the house and drop off a presentation packet. Most agents do not continually follow-up with prospects. They provide timely initial contact, but then do not follow-up with constant communication. Statistics show that it takes an average of 13 touches before a Prospect becomes a client. RealtyJuggler can manage that process for you.

Main:Goals:New Records

New Contacts for 1 Month
Goal: 10
Actual: 3

The new records section tracks the creation of new records in RealtyJuggler. Each of the different databases (Contacts, Prospects, Buyers, Listings, Closings and Rentals) is tracked. When a new record is created, that is recorded. The creation could have happened through clicking on the "New…" button within RealtyJuggler, Google or Outlook synchronization or even an import of records. For Import and Synchronization, the date that the data was imported or synchronized is used as the creation date.

The 6 numbers at the top of this screen are your monthly goals. We recommend setting goals that are relatively conservative, yet allow you to maintain a steady level of work throughout the year. For example, setting a goal of meeting 1 person per day seems easily achievable, and that could then be set as a goal by entering the number 30 for your monthly goal.

Let's assume your average commission is $5,000 and you would like to make at least $50,000 a year in income. That would mean that you would need to complete at least 10 closings a year. Divide that by 12 to get the monthly goals and that would be roughly 1 closing per month.

These goal numbers for new records are integers and so you will need to round up and enter a whole number for your monthly goals.

The 6 dials on this screen display your goal against your performance for the past 30 days.

There are two charts at the bottom of the New Records that display new records that have been created over time. The first chart is a 30-day chart and the second one shows a 1-year trend. These charts display a stacked display of creation of new records, which will give you an excellent feel as to how much activity you are generating over time.
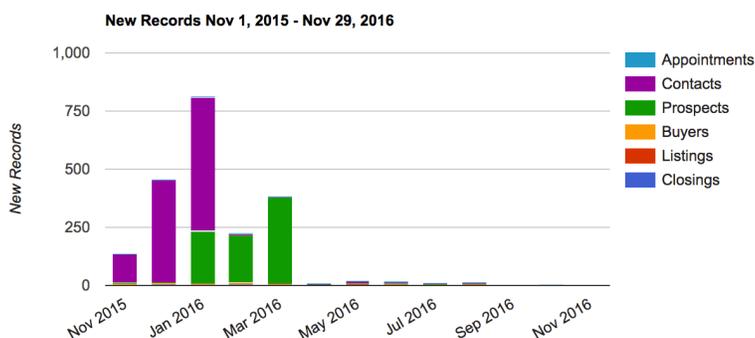
Main:Goals:Touches

The Touches screen displays a bar graph of unique touches over the past 7 days. The results are stacked and show scheduled appointments, as well as last contact date for Prospects, Contacts, Buyers, Listings and Closings. This information can give you a holistic view of how many unique people you have met with over the past 7 days.
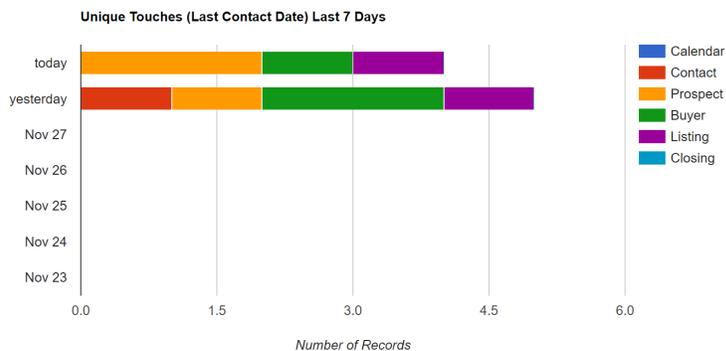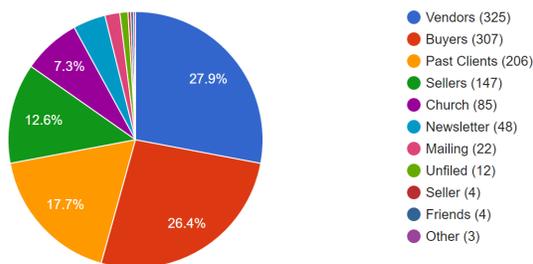

Below that chart are 4 tables which display last contact date information for Contacts, Prospects, Buyers and Listings by category. This information can be valuable in determining if you have been keeping in touch with your prospects, sphere of influence, and past clients. If you have records that have a last contact date of Never or over 1 year, you should consider how to reach those people and let them know that you are still alive and selling real estate.

Last Contact Date for Prospects Database

Category	0-7 Days	8-30 Days	31-90 Days	91-180 Days	181-365 Days	1+ Year	Never
All (9)			11%	44%	11%	33%	
Unfiled (5)			20%	60%		20%	
Client (3)					33%	67%	
Buyer (1)					100%		
callnow (1)				100%			

Main:Goals:Categories

Contact Records by Category (ALL Time)

- Vendors (325)
- Buyers (307)
- Past Clients (206)
- Sellers (147)
- Church (85)
- Newsletter (48)
- Mailing (22)
- Unfiled (12)
- Seller (4)
- Friends (4)
- Other (3)

The Categories screen displays several pie charts showing the most popular categories for each database. The top 9 categories are listed with the number of records listed in parentheses.

Main:Goals:Income

The income screen breaks down income in the form of a bar chart. Projected income is listed against actual income. Projected income is income based upon Buyer and Listing records that have Projected Close date filled. For Closings, the Projected income is when the "Received Commission Check:" date is empty.

Income (12 Months)

- Pending Income
- Received Income
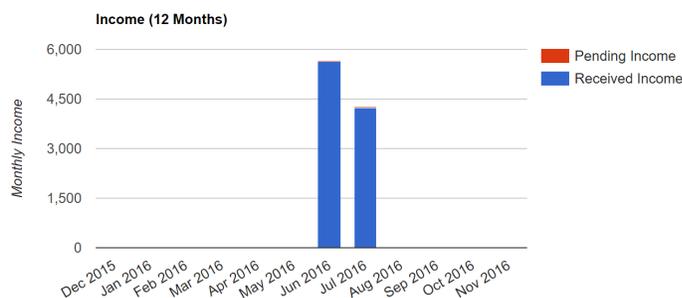
Received Income by Side (12 Months) Total $9,870.00

- Buy Side ($4,230.00)
- Sell Side ($5,640.00)
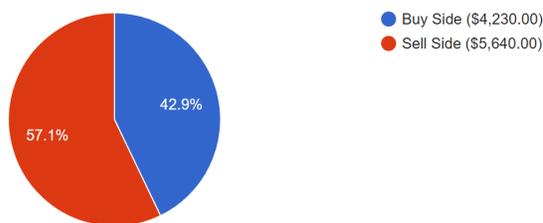
A second pie chart displays the breakdown between Buy Side Closings and Sell Side Closings.

Main:Income

More detailed information about projected income and actual income can be found by going to **Main:Income** screen of RealtyJuggler. At the bottom of that screen you will see the following statistics:

Total Pending Gross Income:
Total Pending Net Income:
Total Received Gross Income:
Total Received Net Income:
Total Number of Sides:
Sales Volume:
Average Net Income / Side:

Additionally for Canadian and real-estate professionals outside of the USA, you will see both taxes paid and taxes unpaid values.

You can filter by a date range by clicking on the tabs at the top of the screen.
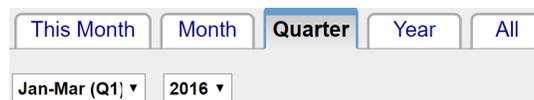
You can also filter by database by clicking on the "Show:" drop-down menu in the upper-right corner of the screen. Projected values are in bold and red.

This screen can be helpful in seeing past sales figures as well as cash flow. Make sure to enter a "Projected Close Date:" as well as the Commission tab for both the Buyer and Listing records. With that information, RealtyJuggler can make cash flow projections for you.

 Video Tutorial 27 - Income/Commissions has additional explanation of how to track your income.

Commissions Calculator

The Buyer, Listing and Closing records contain a Commission tab. This tab allows you to compute your commission for a deal. You can enter referral costs, splits and any other deductions required. We recommend that you use estimated values for your Buyer and Listing records and enter a Projected Close Date. This will allow you to project estimated cash flow using RealtyJuggler.

 Video Tutorial 26 - Income/Commissions provides an overview of the Commissions calculator
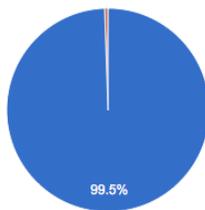
Main:Goals:Expenses

The expenses screen displays a bar chart showing the monthly expenses. This can be valuable to see expenditures over time.
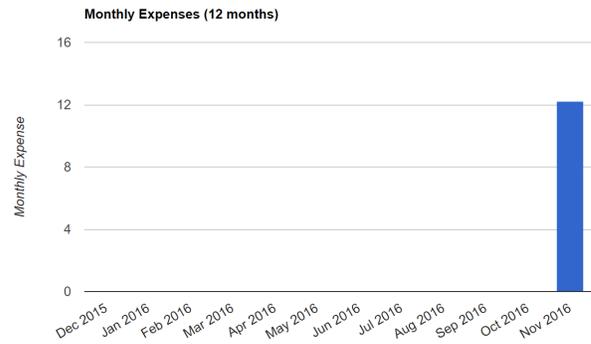
A pie chart at the bottom of the screen displays expenses by category breakdown. The top 9 categories by cost are listed.

Main:Expenses

The expenses screen privides a summary of your expenses. Use the tabs at the top of the screen to filter by a date range.

This Month	Month	**Quarter**	Year	All

Jan-Mar (Q1) ▾	2016 ▾

And you can use the "Show Category:" drop-down in the upper-right corner of the screen to get a sub-total of all expenses for a specific category. Sub-total values are displayed at the bottom of that screen.

 Video Tutorial 27 - Expenses provides an explanation of how to use the Expenses section of RealtyJuggler.

Main:Goals:Ratios

	0-30 Days	0-90 Days	0-180 Days	0-365 Days
Prospect to Client Success Rate	167%	167%	167%	167%
Client to Contract Success Rate	20%	20%	20%	20%
Contract to Close Success Rate			100%	100%

Prospect to Client Success Rate = (New Buyers + New Listings) / New Prospects
Client to Contract Success Rate = New Closings / (New Buyers + New Listings)
Contract to Close Success Rate = Completed Closings / (Cancelled Closings + Completed Closings)

This screen lists some important Ratios that you can use to determine your effectiveness in prospecting and closing deals.

The date ranges show these success metrics based upon time period. For most agents, the short-term values are likely to be quite volatile. It is likely the 12 month figure will give you the most accurate statistics in how well you are turning leads into clients, how well these clients turn into contracts and how well these contracts turn into closed transactions.

 Hover your mouse over individual items in the ratios table and you can see the underlying numbers that were used to generate the final percent value.

Main:Goals:Referral Map

The referral map shows the referral sources you have been using to generate leads and clients. The **Referred By:** field is available for the Contact records and the **Referral Source:** field is available for Prospect records. We recommend entering information into these fields for every contact and every project record. If your leads are being loaded into RealtyJuggler using the email feed (**Main:Settings:Email Feed**) this field will be automatically entered.

The referral map lists all of your referral sources, along with which records are associated with what source.

Referral Map for: Prospects ▾

Sam Andrew(1)

The larger the item is, the more important of a lead source. The number in parentheses is the number of leads that came from that lead source. Hover your mouse over an individual item to see detailed information for the leads that came from that lead source.

You can edit a master list of lead sources by going to **Main:Settings:Preferences**:General. The **Sources of Referrals and Inquiries:** field contains your master list. Just edit as a normal text field with 1 line per source. This master list does not have to be exhaustive. Instead, we recommend entering the most common lead sources. If you get a lead from an unusual source, you can forgo using the drop-down menu and type directly into the **Referral Source:** text field for your Contact record, you can enter that into a specific Contact or Prospect record by clicking on the text field and typing directly into the Referral Source field.

Once the lead source has been entered, it is retained for the entire deal flow. This allows you to recognize which lead sources are the most effective in producing closed deals. The Closing database can also be mined for longer periods of time using the Year drop-down menu. The longer you use RealtyJuggler the more data will be available for you to study and provide more effective advice as to which lead sources produce the most income.