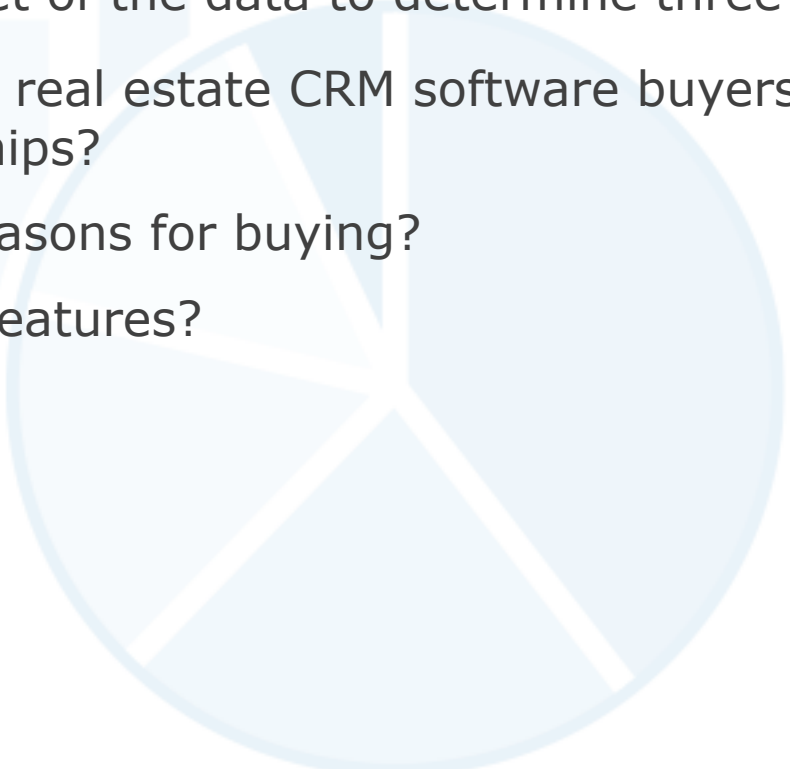# Software Advice BuyerView: Real Estate CRM Report
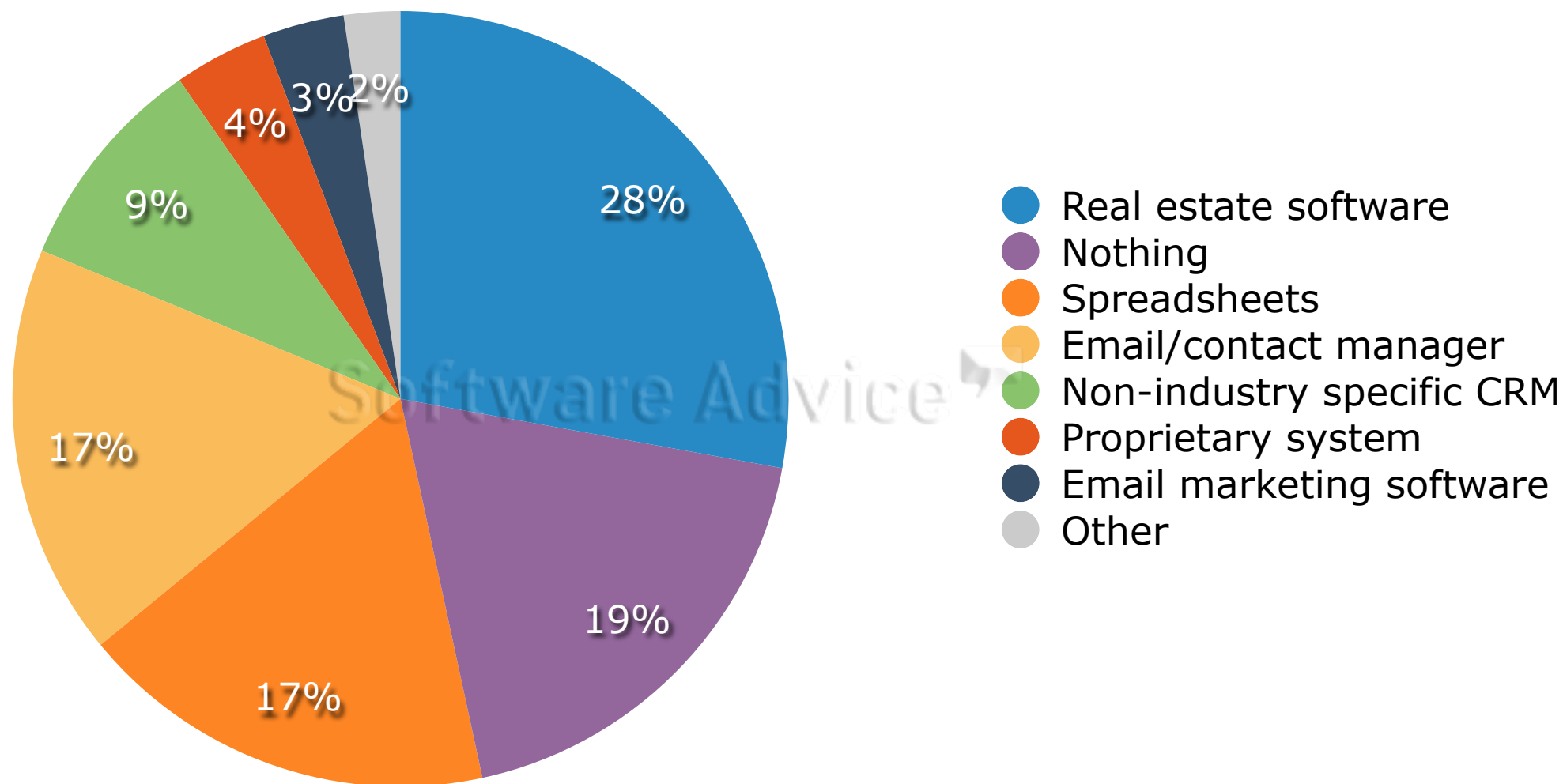
Insight into today's software buyer

Software Advice

Abstract

Every year, Software Advice speaks with thousands of real estate professionals looking for the right customer relationship management (CRM) software for their business. We tapped into a subset of the data to determine three things:
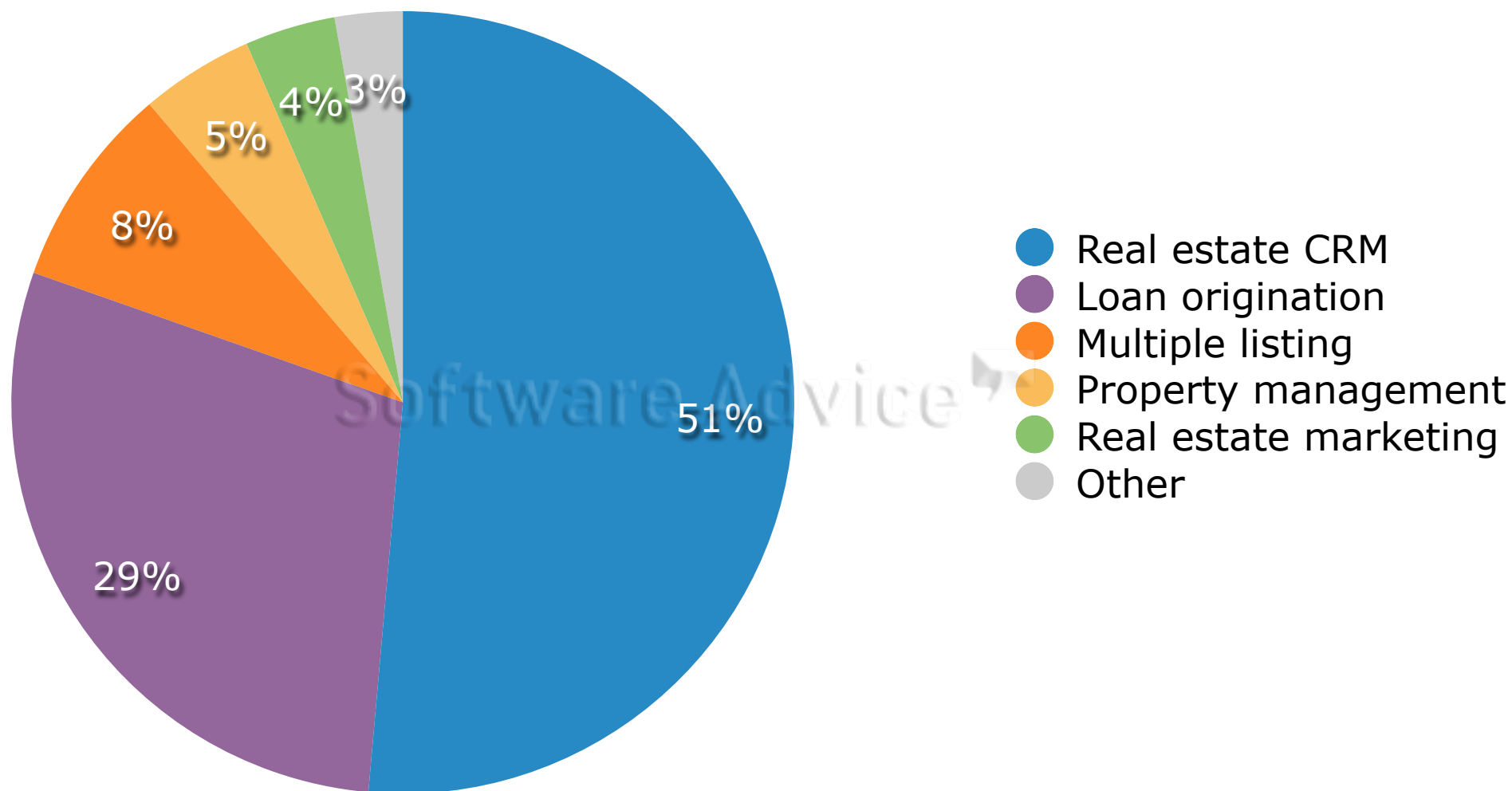
- What solutions are prospective real estate CRM software buyers currently using to manage customer relationships?

- What are the most common reasons for buying?

- What are the most requested features?

Prospective Buyers' Current Methods

Legend:
- Real estate software — 28%
- Nothing — 19%
- Spreadsheets — 17%
- Email/contact manager — 17%
- Non-industry specific CRM — 9%
- Proprietary system — 4%
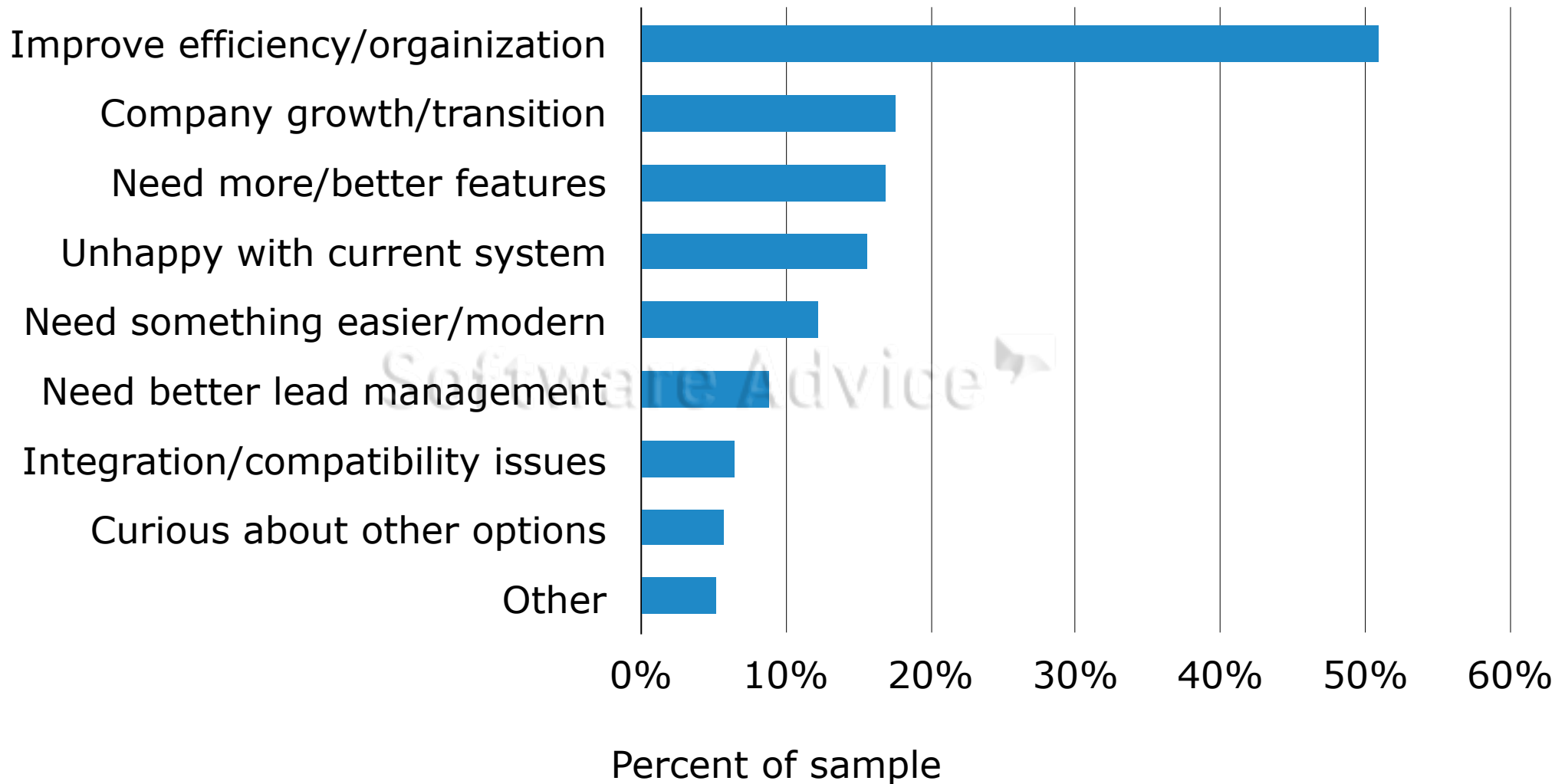- Email marketing software — 3%
- Other — 2%

A majority of buyers (53 percent) were using basic methods such as spreadsheets, email clients or pen and paper to manage their customer relationships.

Prospective Buyers' Current Real Estate Software

- Real estate CRM
- Loan origination
- Multiple listing
- Property management
- Real estate marketing
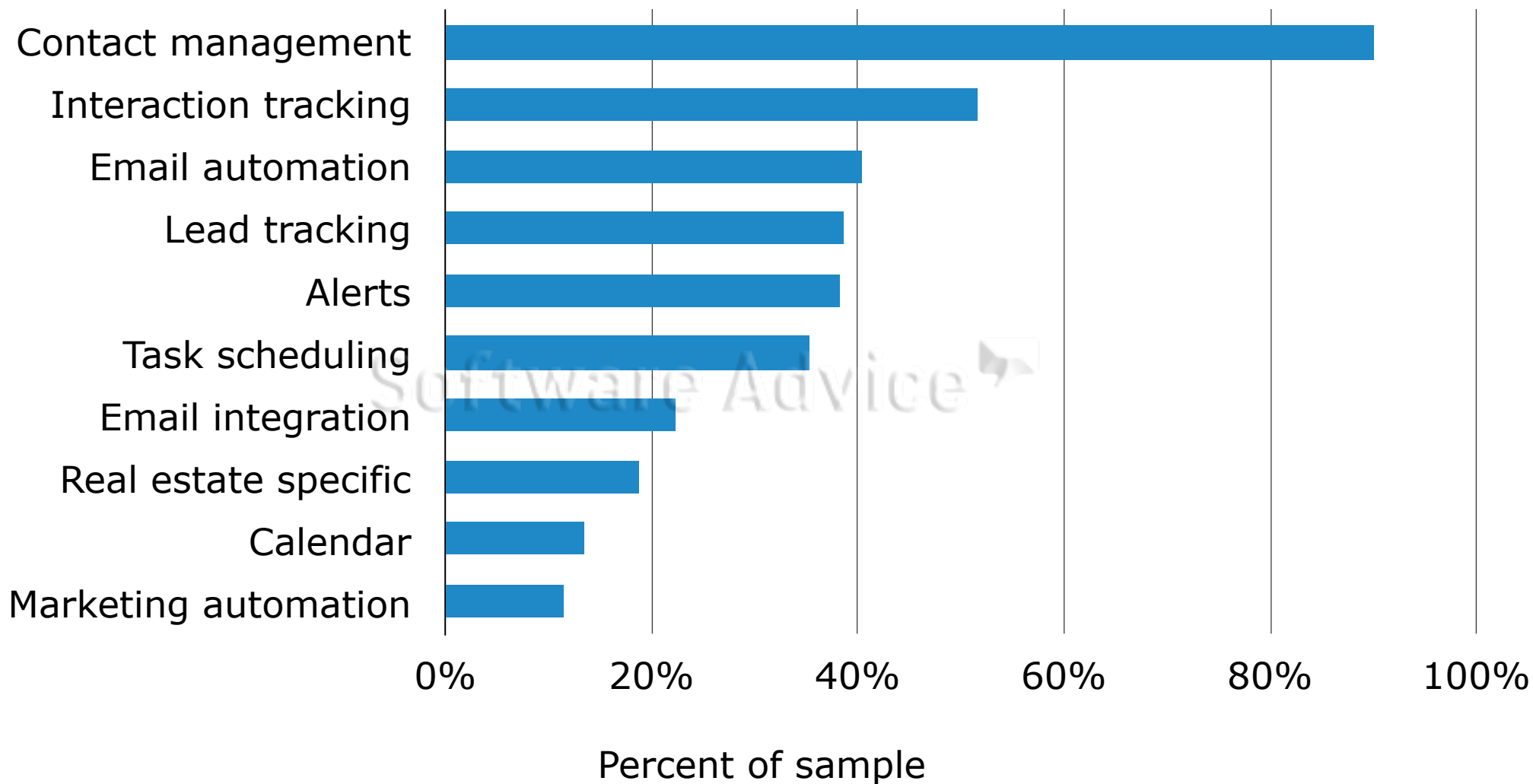- Other

51%

29%

8%

5%

4% 3%

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Of the buyers previously using real estate software, a combined 37 percent were using loan origination or multiple listing software with built-in contact management.

# Top Reasons for Evaluating Real Estate CRM Software

Reason	Percent of sample
Improve efficiency/orgainization	~51%
Company growth/transition	~18%
Need more/better features	~17%
Unhappy with current system	~16%
Need something easier/modern	~13%
Need better lead management	~9%
Integration/compatibility issues	~7%
Curious about other options	~6%
Other	~5%

Percent of sample

Fifty-one percent or buyers said they were evaluating CRM software to improve efficiency and organization.

Top-Requested Real Estate CRM Features

| Feature	Percent of sample
Contact management	~90%
Interaction tracking	~52%
Email automation	~41%
Lead tracking	~39%
Alerts	~38%
Task scheduling	~36%
Email integration	~23%
Real estate specific	~19%
Calendar	~14%
Marketing automation	~12%

Percent of sample

In addition to basic contact management features and interaction tracking, many real estate CRM buyers (41 percent) were also looking for email automation.

Deployment Preferences

- Web-based
- No preference

23%

77%

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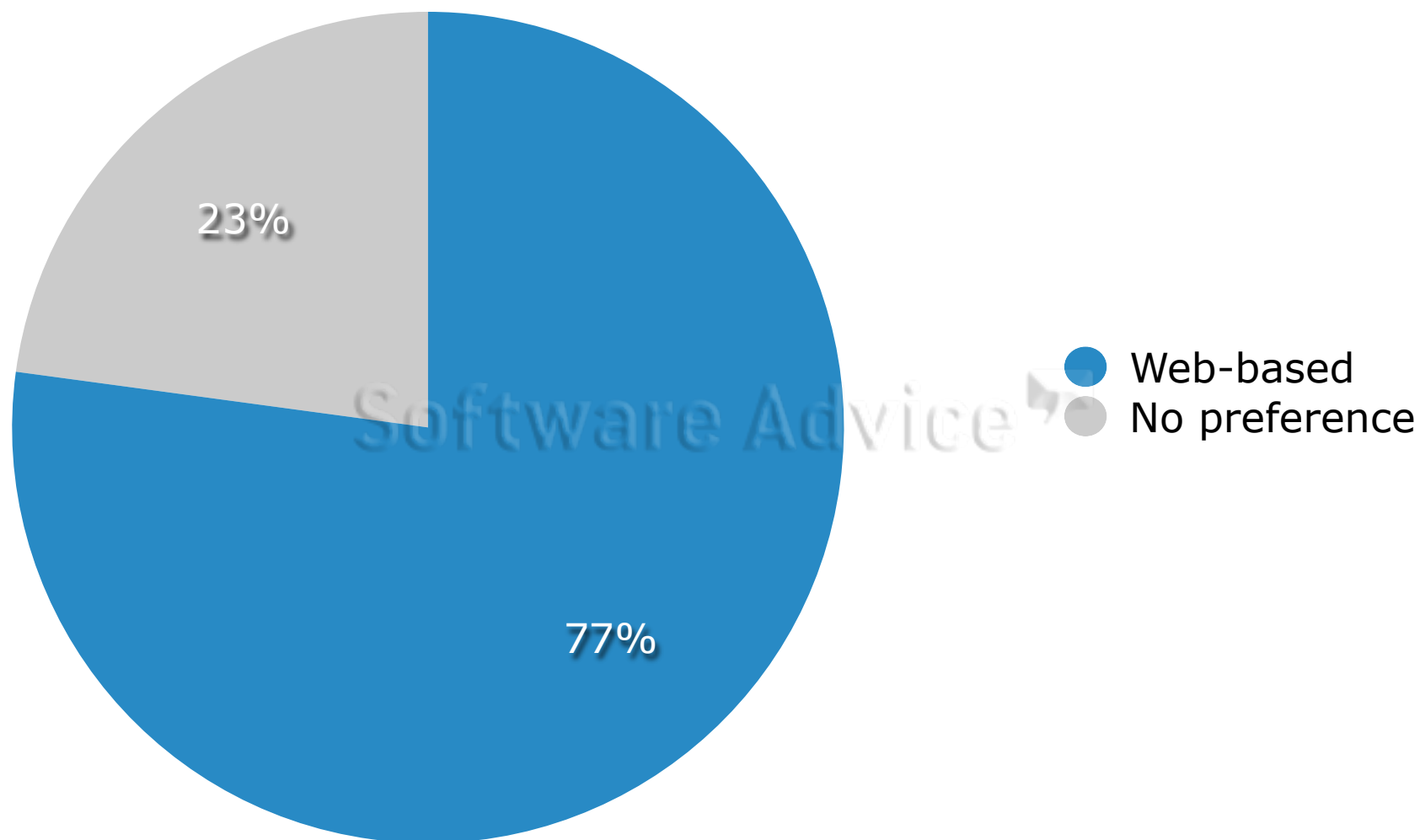
Seventy-seven percent of buyers expressed a deployment preference, and every single one of them requested to evaluate only Web-based software.

Integration Preferences

Pie chart showing integration preferences:
- Best-of-breed: 64%
- Integrated suite only: 36%
- No preference
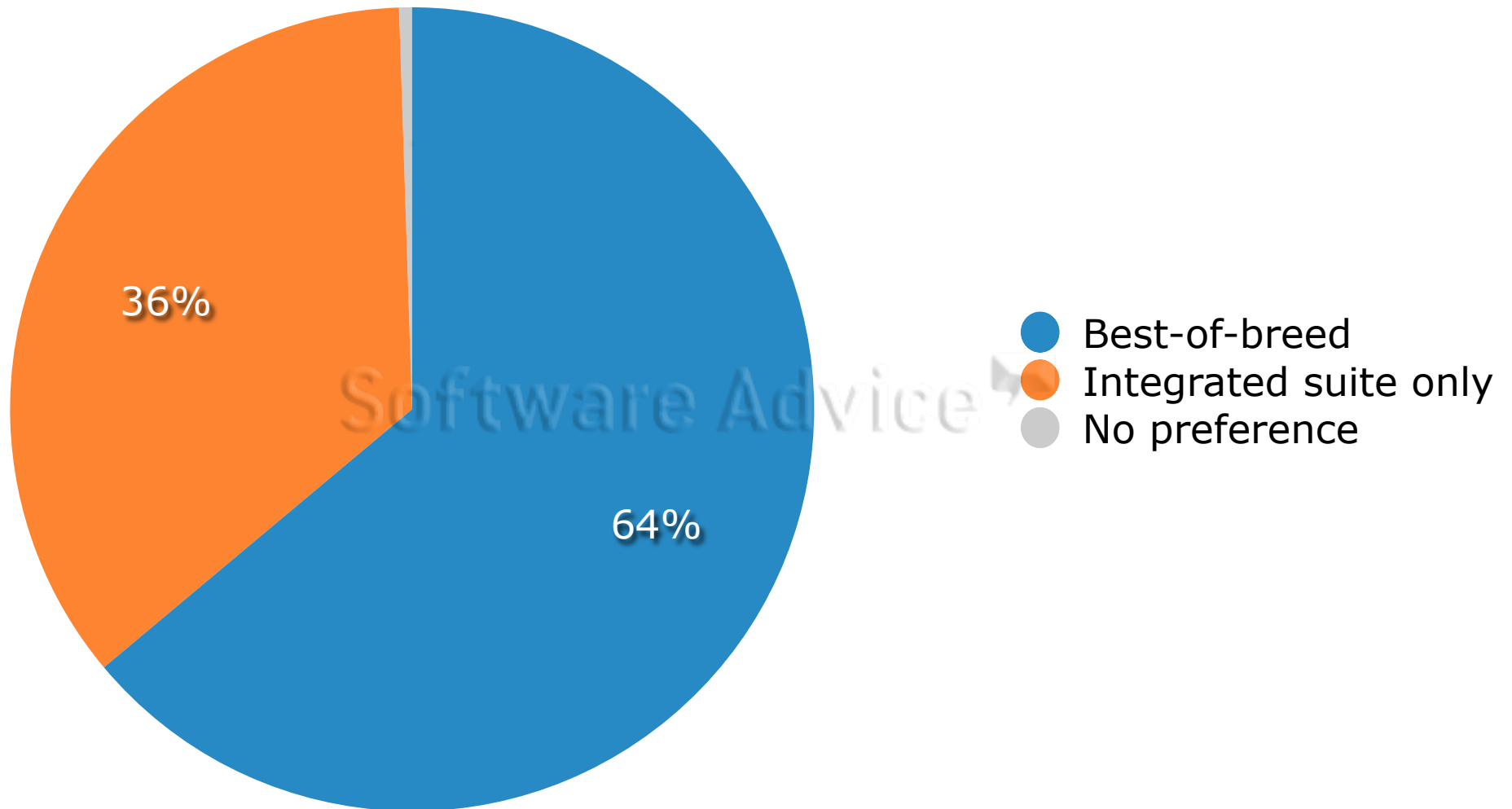
A significant majority of buyers in our sample (64 percent) requested a best-of-breed solution (e.g. only sales force automation or marketing automation).

Demographics: Prospective Buyer Size by Employee Count

Legend:
- 1 — 38%
- 2-5 — 39%
- 6-10 — 10%
- 11-2 — 4%
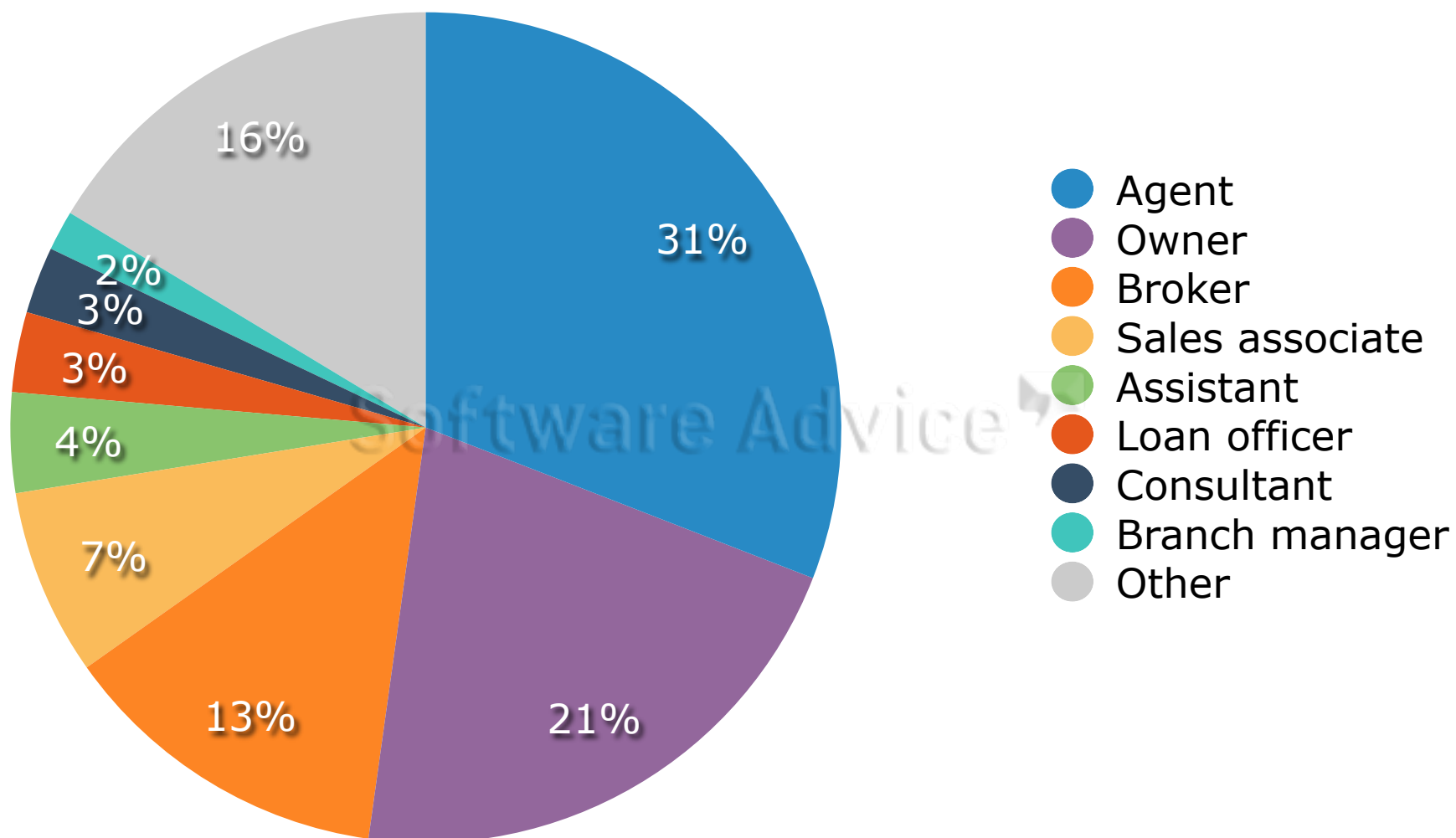- 21-50 — 5%
- 51-100 — 2%
- 101+ — 2%
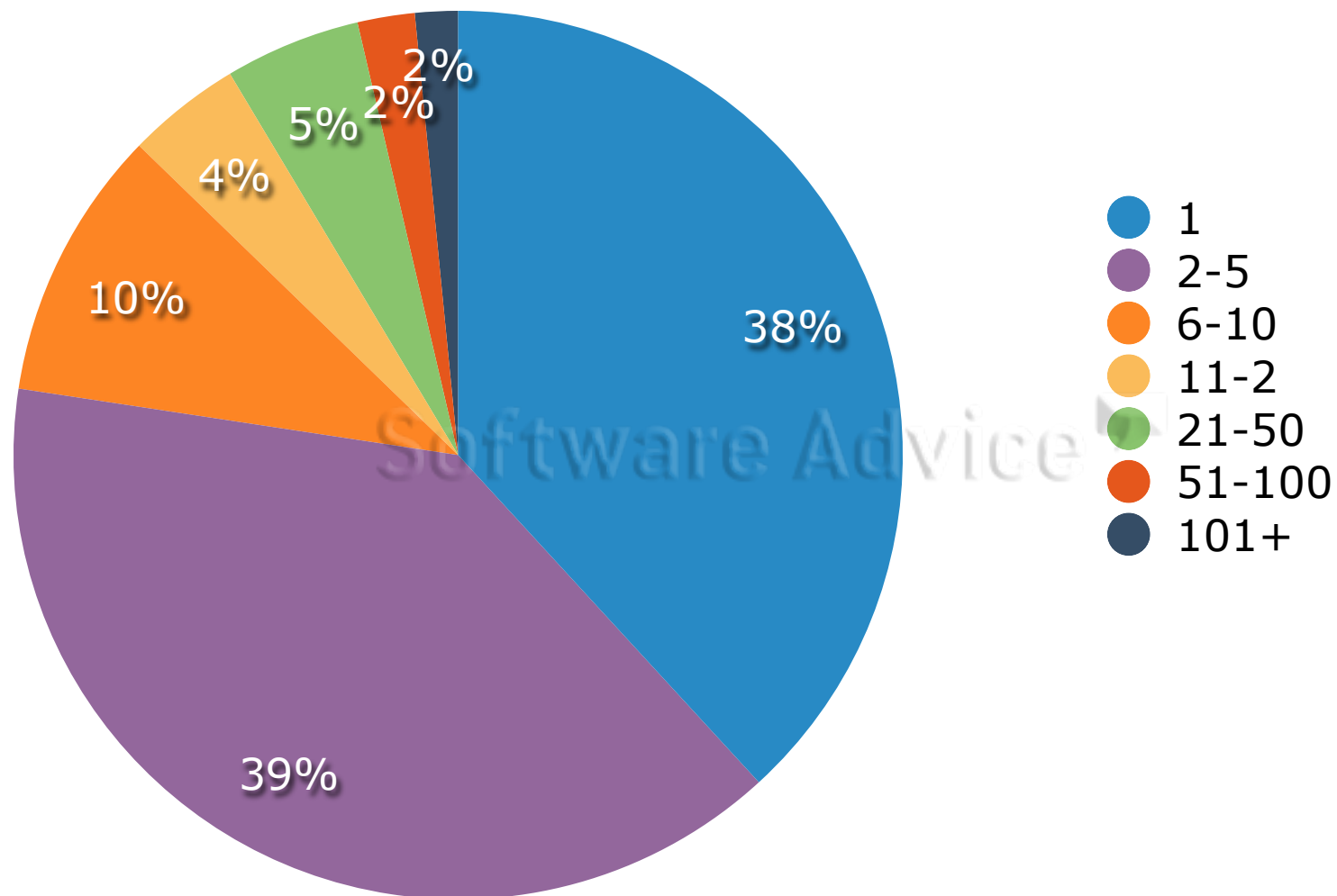
Most buyers either represented agencies with fewer than five employees (39 percent) or were themselves independent agents or brokers (38 percent).

Demographics: Prospective Buyers by Industry

22%

78%

- Real estate
- Mortgage
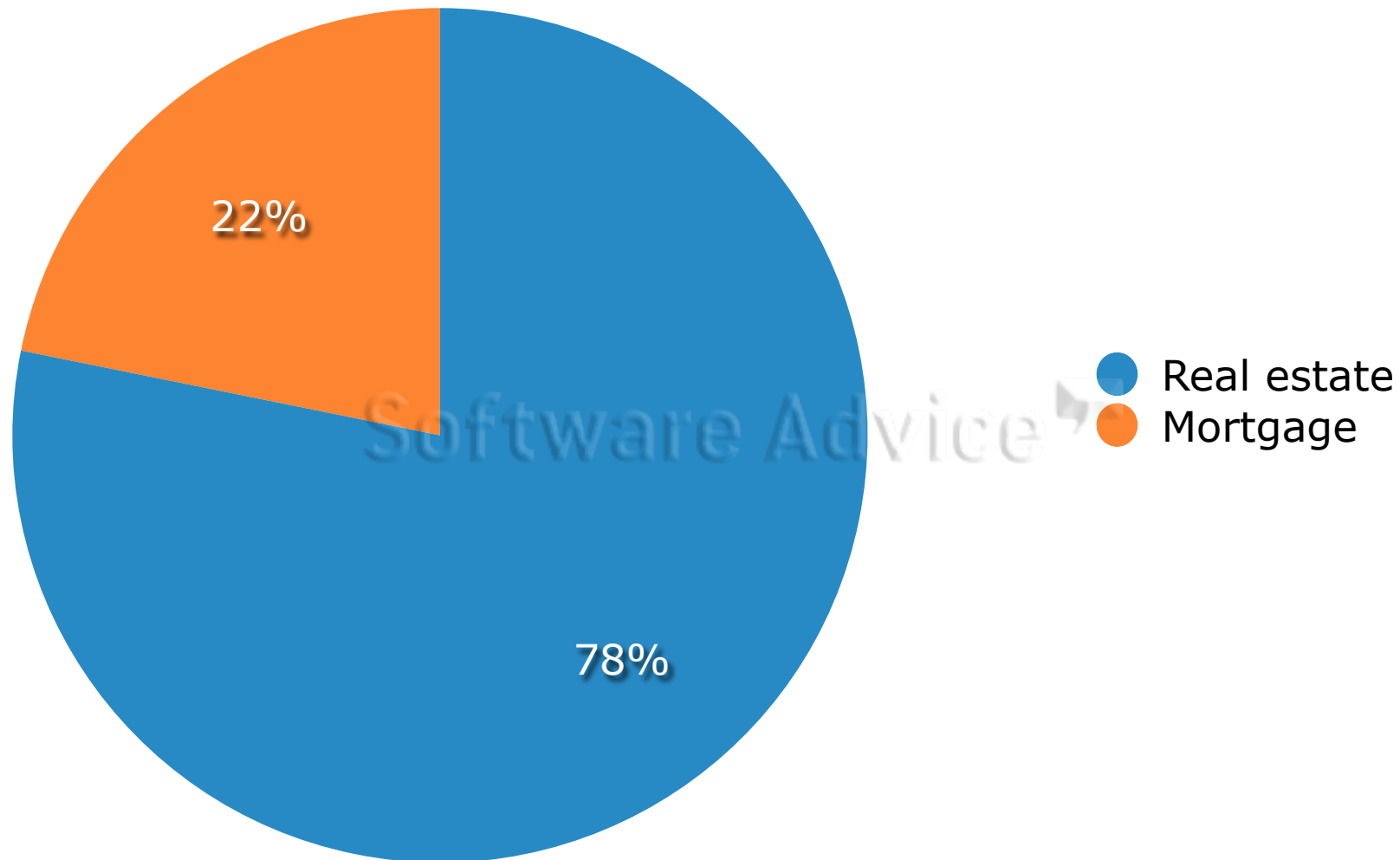
Of the 385 buyers in our sample, 78 percent were in real estate and 22 percent were in the mortgage business.

Demographics: Prospective Buyers by Role

Legend:
- Agent — 31%
- Owner — 21%
- Broker — 13%
- Sales associate — 7%
- Assistant — 4%
- Loan officer — 3%
- Consultant — 3%
- Branch manager — 2%
- Other — 16%

Thirty-one percent of buyers identified their title as "Agent," with another 21 percent identifying as the "Owner" of their agency or brokerage.

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