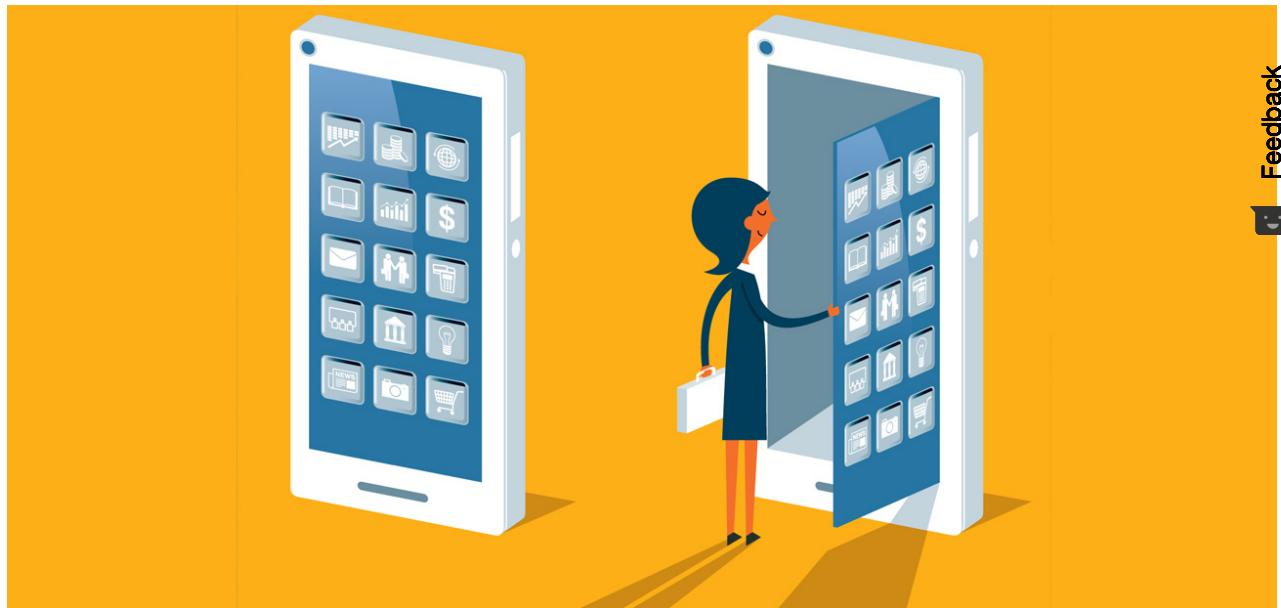


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Tools Helping 30 Under 30s Shine Brighter

Find out what the most successful young agents and brokers use to stay organized and consistent, as well as close more deals.

June 19, 2018

by Erica Christoffer </author/erica-christoffer>

When you're operating a busy real estate business, juggling several clients and transactions at a time while also working to keep your pipeline full, it's inevitable that some things will fall through the cracks. That's why you need systems in place to save you from the repercussions of your own success.

Take the example of Christie Duggar </30-under-30/christie-duggar>, a 28-year-old broker-associate and partner of The Group Inc., in Fort Collins, Colo. She says the biggest key to her success is an elaborate system of checklists she developed to ensure every transaction-related task is completed. Whether it's a buyer or seller transaction, she has a list of items that she personally created to spell out what she and her clients need to accomplish between the first consultation and the one-year anniversary of the closing. The lists include tasks for her first meeting with a buyer, a buyer under contract, a new listing, a listing under contract, and then a weekly and monthly checklist for standard business-related tasks. "This keeps me on track and makes sure that all of my clients have the same A+ experience," Duggar says. She keeps a binder of all her current client checklists and references it every morning to make sure she stays on track.



Some may call Duggar an overachiever when it comes to low-tech organization. But her consistency and professionalism helped her close more than \$61.8 million in sales in 2017—with a total of 93 transaction sides—and landed her a spot in REALTOR® Magazine's 30 Under 30 class of 2018.

Like Duggar, several members of this year's bold and bright group of real estate stars shared the tools and products they use to get through the nitty-gritty workings of their businesses each day.

Fellow 30 Under 30 honoree Trent Zimmer </30-under-30/finalist/2017/03/trent-zimmer>, team leader and CEO of the Zimmer Group at Keller Williams Premier Realty in Apple Valley, Minn., says he can't function without his iCal <<https://www.apple.com/support/ical/index.html>> calendar. "I am big on time-blocking to maximize productivity, so if my calendar tells me it's time to generate leads, then I know I need to be doing lead gen," he says. The Apple product also helps him keep track of appointments, showings, conference call numbers,

and other notes, which is crucial when managing a team of more than 70 agents. Plus, his Apple watch tells him when he needs to leave to make it to appointments on time. "It makes life so much easier," Zimmer says.

Santino Filipelli <[/30-under-30/santino-filipelli](#)>, CIPS, CRS, broker-owner of Portland, Ore.-based Modern Realty, also knows what it's like to manage a thriving team. This 30 Under 30 honoree swears by Follow Up Boss <<https://www.followupboss.com/>>, a real estate CRM and lead management software. "I can track all our contacts, and it auto syncs to our leads on social media if their phone or email match," he says. The platform also records all emails, texts, and phone conversations made through the system, which allows users to generate reports.

Filipelli is also a fan of Google's G Suite <<https://gsuite.google.com/>> because of its email and collaboration tools. He says he loves how it integrates with every other platform his company uses. "I have complete control and access to anything I need at any time with their platform," including Google Docs, Google Drive, and Google Spreadsheets, Filipelli says.

 Feedback

The tool Brie Stephens <[/30-under-30/brie-stephens](#)>, leader of the Lake Life Realty Team at Keller Williams Lakes & Mountains Realty in Meredith, N.H., finds most useful is Brivity <<https://www.brivity.com/>>, a transaction management system and CRM. Developed by Ben Kinney <[/30-under-30/honoree/2008/06/ben-kinney](#)>, a member of the 30 Under 30 class of 2008, the platform is all about creating consistency and accountability for real estate pros. Stephens can create an action plan—complete with steps necessary to execute tasks—and then assign those tasks to team members and set deadlines. For example, if she or one of her teammates signs a listing agreement, their first action plan is "the coming soon plan," which they apply to the property in Brivity. All the tasks Stephens created for that particular action plan are then assigned.

"Brivity is literally the brain of my business," she says. Once one team member completes a task, the system alerts the next team member what to do. So, when professional listing photos are delivered, her marketing specialists are then assigned the task of creating the

brochure with the photos. "Once I review and make my edits, I check it off in the system, and then the lead agent for that property is notified to print and send to the client for approval," Stephens says. It also gets the clients involved because Stephens gives them their own online portal to check in whenever they want, see recorded showing feedback, check marketing materials, and view what tasks have been completed and what's coming up. "It has truly allowed me to leverage my business into a fine-tuned, well-oiled machine."

For 30 Under 30 honoree Ryan Fitzgerald <[/30-under-30/ryan-fitzgerald](#)>, broker-owner of Raleigh Realty in Raleigh, N.C., the tools that do the most for his business are those he created himself: his brokerage website <<https://www.raleighrealtyhomes.com/>> and spin-off website, uphomes <<https://www.uphomes.com/>>. After building and fine-tuning the sites, Fitzgerald has focused on content marketing to build SEO and allow people to find him organically through online search. One targets the Raleigh market, while the other focuses on the Charlotte, N.C., area. The sites combined generate more than 1 million visits per year, with an average of 10 to 12 people daily asking for help buying or selling a home, Fitzgerald says. "My website is like a store that is always open," he says. "I am generating leads while I am sleeping." Today, Fitzgerald spends most of his time focused on growing web traffic.

Feedback



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