



# 7 Apps for **Productive Realtors**

AUTOMATE, SAVE TIME, AND CLOSE DEALS FASTER

**D.** ALLISON LEE  
DIGITAL PRODUCTIVITY CONSULTANT

## D.

As a busy real estate agent, you're always on the move. There's no time to waste. You need current information at your fingertips and you also need to get things done. Realtors have to adapt to an ever changing landscape all while working primarily from the road. The good news is that you can streamline your mobile office without wasting time and getting stressed out.

And you can do just that by using the best tech tools. You're probably already aware of many realtor-specific apps like Realtors Property Resource® (property reports), Top Producer (CRM), Placester (custom websites), Open Home Pro (open house lead management), and others. But there are a host of other apps that can help you automate parts of the sales process, save time, and help you close deals faster.

**Here are seven apps you need in your real estate productivity toolkit.**

# 7 | Calendly

Have you ever tried scheduling appointments with clients and prospects (or people on your team) and found yourself in a never-ending back-and-forth email chain? This can be very frustrating and is the least productive way to use your limited time.

Enter Calendly. This app makes scheduling easy and simple for you and your clients. Connect it to your digital calendar (Google Calendar, Outlook, and iCloud) and set your available times. Embed your custom Calendly link in your email signature or website and send it via email or text so your client can select a day and time based on your pre-set availability.

No more scrambling and rushing between meetings. Calendly lets you add in “buffer time” at the beginning and end of any

meeting so you can account for travel time or include breaks in between meetings. That way, you can be prepared and on-time to your scheduled appointments.

If you’re always constantly sending email reminders to your prospects and clients (or if you’re too busy to remember to do that), you can now cross it off your list of things to do. Let Calendly’s automated reminders do it for you. You save time and, best of all, you avoid no-shows.

**Other tech tools to check out: Acuity Scheduling, YouCanBook.Me, Doodle, Microsoft Bookings, Zoho Bookings**





## 2 | Zoom

It's probably no surprise that Zoom is on this list. Realtors can use it to easily meet with prospects, clients, colleagues, or even attend networking events all from their virtual office. It's a more personalized way to communicate (compared to phone calls and text messages) that can help you build trust more quickly with your prospects especially if you can't meet in person.

Download Zoom to your laptop or mobile device (iOS and Android) and take advantage of features like:

- **Breakout rooms**
- **Screen sharing** (helps when you need to review something specific with your client)
- **Whiteboard collaboration**
- **Recording meetings** (this feature is great for trainings and webinars, too)

- **Chat** (talk publicly or privately with meeting participants)
- **“Touch up” your appearance**
- **Virtual backgrounds** (add a bit of fun to your meetings or hide a messy workspace)

Zoom also integrates with Outlook 365 and Google Calendar so you can schedule your meetings without having to leave your calendar app. It also integrates nicely with Calendly. That means every time someone schedules a meeting with you via Calendly, all the Zoom details will be automatically added to the event. No more searching for the link to join the call. Big time-saver!

And, with enhanced security features -- like the attendee waiting room and the ability to lock your meetings -- there's no reason to not use this helpful tech tool.

**Other tech tools to check out: Google Meet, Skype, FaceTime, Slack, Join.me**



## 3 | Evernote

If you haven't heard of Evernote, be sure to add it to your list of apps to try. At the basic level, you can use it to capture and keep track of your best ideas, take notes, or create meeting agendas. But it's much more than that. Think of Evernote as your second brain that helps you capture everything, store all that information in one spot, find it quickly, and have it at your fingertips no matter where you are.

Use Evernote to reduce paper clutter and store a variety of file types like:

- **Images** (Bonus: You can search text in images!)
- **Handwritten notes**
- **Documents, spreadsheets, and PDFs** (you can annotate them, too!)
- **Audio files** (including your voice memos and voice messages)
- **Digital articles**
- **Screenshots** of just about anything you find online courtesy of Evernote's Web Clipper

You can also use the Web Clipper to save important emails (Gmail, Outlook). This is especially helpful if you want to clip a specific email (or set of emails) to a project notebook so that everything is all in one spot. You can even import your Google Drive files. Time saver!

The best part of the newly updated Evernote? You can start and end your day at "Home." Evernote Home is a dashboard with everything you need to be productive all in one location.

**You can customize Home with widgets like:**

- **Scratch Pad** (like a sticky note, use it to capture ideas)
- **To-do list** (create assignments, reminders, and deadlines)
- **Google Calendar** (never miss an appointment)
- **Pinned notes** (for easy access to priority notes)
- **Notebooks** (keep all related info together)

**Other tools to check out: Notion, Microsoft OneNote, Obsidian, Google Keep**



## 4 | Scannable

Papers can accumulate quickly and clutter your mobile office (a.k.a, your car). But you can digitize many (if not all) of those documents so that you can keep profuse paper pile-ups at bay.

When you go paperless, you'll also:

Reduce costs. When you digitize your docs and other pieces of paper, you can reduce your reliance on file folders, printer ink, and file cabinets.

Save time. Say goodbye to mounting files, unopened mail, huge stacks of business cards, piles of receipts, old contracts — and wasted time sifting through all those papers! Digitizing your files can help you curb your paper clutter problem and reduce the time you spend searching for what you need. Just type in a keyword (related to the doc you're looking for), and let your cloud storage service find it for you.

Simple, easy, and fast.

Access from anywhere. One of the best things about going paperless is that you can access your data no matter where you are. You won't have to worry that you left the hard copy on your desk because you can find it in the cloud (as long as you have Internet access, your user name, and password).

So, how can you get started? A free app like Scannable (brought to you by the nice folks over at Evernote and available only in the AppStore) will let you scan business cards, documents, receipts (e.g., gas, client gifts), notes, and other papers using your smartphone. Scannable will also automatically rotate, crop, and adjust your scans so that they are clear and easy to read.

Share your scans via email or text or export them (JPG, PDF) to Evernote and other cloud storage apps.

**Other tools to check out: Genius Scan, Adobe Scan, Dropbox Scan**



# 5 | Freshbooks

As a realtor and business owner, it's important to keep your eye on your bottom line and to have a good understanding of your financial status. Freshbooks can help.

It's a versatile cloud accounting app that gives you a financial overview or simple financial summary. The app also allows you to create proposals (right inside the Freshbooks), track time (no more paper timesheets), and manage your bookkeeping tasks.

With Freshbooks, you'll get a nice selection of additional features including (but not limited to):

**Reporting.** Reports include: General ledger, Profit and Loss, Chart of Accounts, Bank Reconciliation (you'll need to connect your bank to the app).

**Collaborate.** Invite your employees, contractors to work on projects.

**Accountant access.** Give your accountant or bookkeeper access to your reports.

**Mobile apps.** Download the Freshbooks iOS or Android app. There's also a Chrome browser extension.

With much of the heavy lifting done for you (so many functions in one tool), you can focus on other areas of your business – and know that reports and accompanying details are just a few clicks away.

**Other tools to check out: Quickbooks, Wave, Sage, Xero, Honeybook, Dubsado**





## 6 | LastPass

Why stress your brain with trying to remember the passwords for all your online accounts? If you ever find yourself forgetting passwords, writing them on sticky notes, and worrying about security, then LastPass is a great solution.

It uses some very hard to say technology (AES-256 bit encryption with PBKDF2 SHA-256 and salted hashes) to protect your data in the cloud. That means no more writing passwords on sticky notes or molasses-like searches through your password notebook.

LastPass has a pricing plan for just about everyone including individuals and teams. And like many of the apps on this list, you can

use LastPass on the web, your smartphone, or tablet and sync across all devices. So whether you're showing a home, at an open house, or on your way to one, your account information will be easily accessible.

Sign up and all you have to do is remember one master password. Then let LastPass remember all your passwords. Simple, easy, and seamless. There's also no need to worry if you get stuck trying to come up with strong passwords for new accounts. LastPass has a strong password generator that can create them for you.

**Other tools to check out: BitWarden, 1Password, Dashlane, KeePassXC, RoboForm**





## 7 | HelloSign

HelloSign (owned by Dropbox) is a must-have tech tool in your real estate arsenal. This eSignature app will help get your contracts and listing agreements signed quickly so you can close deals faster. It's simple, secure, and easy for you (and your clients) to use whether you're in your office or on the go.

With HelloSign, there's no need to print documents to have them signed. That means you're not only completely eliminating that step, but you're also eliminating paper clutter. There's also no guessing if your client received your contract. HelloSign lets you track the status of your contracts and get notified when a client has viewed and signed the documents you've sent them.

Need to get the same documents signed often? Don't create them from scratch or manually add signing fields every time. Instead turn your most used forms into HelloSign templates. Set up your template once with the signature fields you want and then simply reuse it. No more wasting time dragging and dropping fields for every contract. Set it and forget it.

HelloSign also integrates with several popular apps like Salesforce and Dropbox, Hubspot, Slack, and Gmail.

**Other tools to check out: Adobe Sign, DocuSign, PandaDoc, signNow**

**D.**

Remember, technology is here to help you take your business to the next level. Master its power and take full advantage of the time-saving automation it offers. Try the seven essential tech tools on this list to streamline your busy life and business, successfully run your mobile office, and be more productive.

[dallisonlee.com](http://dallisonlee.com)

**QUESTIONS?**

202.643.7621