



CONTACTUALLY USERS

YEAR IN REVIEW

2018



EXECUTIVE SUMMARY

Many small businesses (like residential real estate) involve transactions that are highly complex and emotional — and clients rely on close, personal interactions for guidance, knowledge and support. These relationships are the greatest asset to grow your business.

In this report, see how Contactually customers have been using our platform to stay in touch with their networks and generate more business.



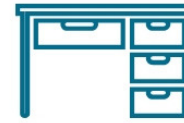
ORGANIZATION & PRIORITIZATION

You may have thousands of contacts in your network, but there is a natural limit to how many you can track and engage with. Grouping contacts by commonalities or traits (like where you met, how likely they will bring you business, or how often you want to follow up) is a simple way to start getting organized.

At Contactually, the primary way to organize and prioritize your contacts is via Buckets. Users set a timer for each Bucket, which prompts a follow up at the desired interval.



88% Contactually has helped get them organized



Average 2.4 connected accounts (emails, calendars, and other tools used like Twitter or Mailchimp) per user

Most common Bucket names added in last year



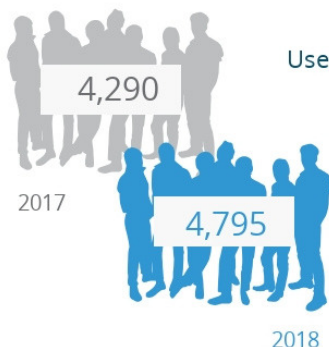
64%

"Very confident" they know which contacts are valuable to their business



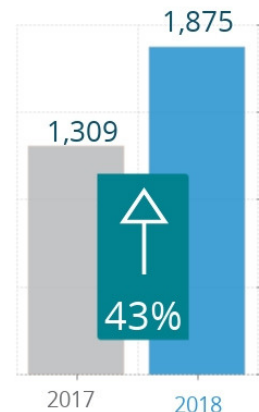
27%

Estimate of one's network that brings business/referrals



Users grew their networks 12% in the last year....

...leading to more relationships being tracked in Contactually



43%

TOTAL NETWORK SIZE

TRACKED RELATIONSHIPS



FOLLOW UP

But how good are you at actually following up with those that matter? If you are running a small business, we know how important it is to grow your client relationships — staying in touch, being quick to respond, and having valuable content to share help solidify those relationships.

Yet we are constantly making choices about how to prioritize our to-do list. Even though we might be getting email, text and other notifications, these are easy to ignore with a swipe or press of a button. A challenge of the modern work environment is how to stay focused on the important tasks, while also addressing the urgent ones.

BROKERS/
MANAGERS



42%

Getting team to follow up is a major pain

35%

Struggle with figuring out best communication practices

A good relationship is critical to making a transaction

98%

AGENTS/
USERS

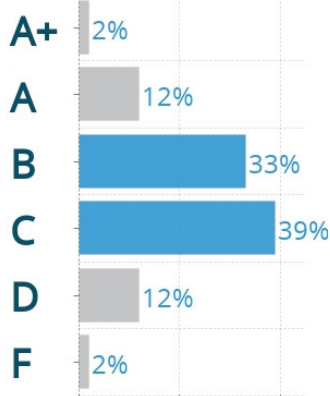


88%

Responsiveness is "extremely important"



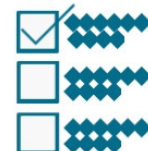
Users don't rate themselves very high in their follow-up



Average time per session per user



Users log in at least every 3-4 days



80% Contactually reminds them of the right people to follow up with....

....but task completion rate is only half

50%



SUCCESSFUL OUTREACH

To maximize your success when reaching out to clients, keep your communication simple. Utilize features within your CRM to optimize your email effectiveness by sending content that will get attention, and send at a time they are most likely to respond.

Contactually offers several features to help you here. Use ScaleMail to send personalized, bulk messages; use Best Time to Send to reach your contacts when they are most likely to respond; use the Chrome extension in Gmail to increase the efficiency of your workflow. And most importantly, be persistent.

Simple subject lines (like these) get the most open, click, and replies



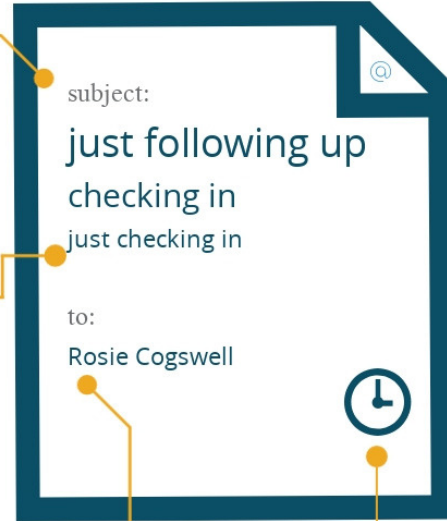
and account for
of all emails sent
from Contactually

ABC

Subject character count of 16-19 is ideal —
gives enough info without being too long



and account for
of all emails sent
from Contactually



It takes multiple attempts to get a response:

4



NEW
LEAD

2



CURRENT
CLIENT

2



PAST
CLIENT

3



HAVEN'T TALKED
TO IN 1 YEAR+

Prime time to get a
response is mid-day

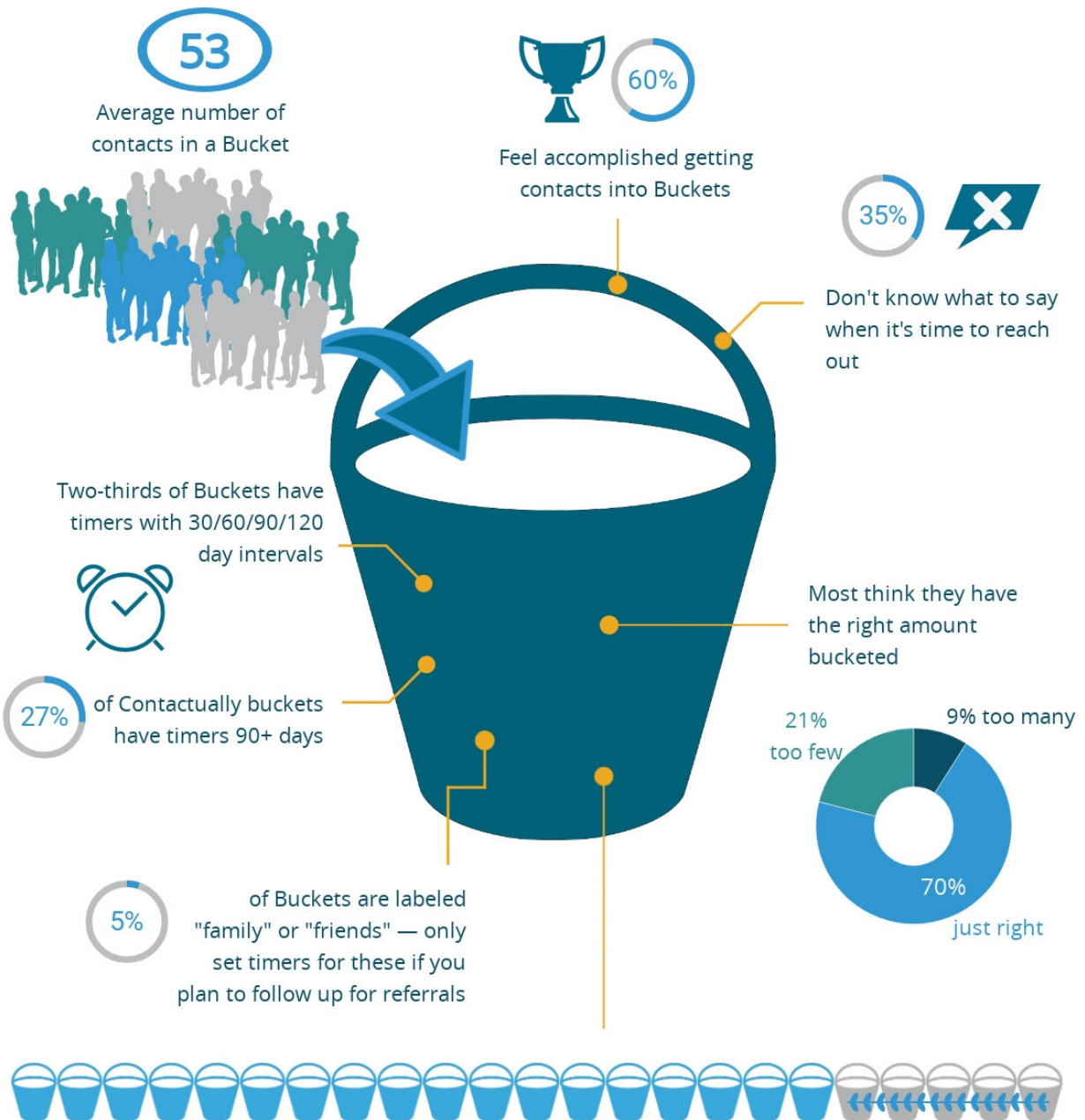




IMPROVING YOUR CRM EXPERIENCE & SETUP

CRMs (like any tool) require a level of commitment and they can be used correctly or incorrectly.

First, think about the 10-20 clients who are most valuable to your business today — and make sure those are sorted first. Keep the number of groups (Contactually Buckets) and the amount of relationships tracked manageable so that you stay motivated and on top of your follow ups. Beware of actions that give the *illusion of accomplishment* like sorting too many contacts or setting Buckets with timers for 90+ days (are these people who are truly valuable to your business?) Keep focused on the actions that help you reach your goals.



In the last year, users reduced the average number of Buckets down to 18 — they are getting more efficient with organization



CONCLUSION

We don't think technology will replace you *or* your business. We believe that technology will help you get organized and develop a deeper understanding of your contacts and where they fit into your business plan. Better yet, with Contactually you can access contact information wherever you might be — on-the-go, or working in your Gmail.

Over the last year, we've seen our users increase the size of their networks, track more relationships, get more efficient with our feature set, and be smarter about how they communicate.

IN 2019, BROKERS AND TECHNOLOGY MANAGERS ARE SAYING THEY WANT THEIR TEAMS MORE FOCUSED ON:

"Staying in touch more often, and more effectively."

"Establishing stronger relationships and providing value at those critical touch points, so you are always top of mind."

"Keeping the depth of relationships as users increase breadth of client base."

"Keeping up with prospect contact information and changes, to not miss opportunities."

SOURCES

A cohort of 5,144 Contactually users' behavioral data; all these customers have been on the platform since September 2017 and have bucketed more than 25 contacts

944 Contactually customers (including both users and managers/brokers); surveys collected in December 2018



CONTACTUALLY.COM