

# Act! opens many new doors for Hawaii real estate agent

When Gretchen Osgood was looking for a better way to manage her real estate business in Kona on Hawaii Island's west coast, she just Googled 'best CRM' and up popped Act!. It was the start of a beautiful relationship that's led to astounding sales success.



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**Gretchen Osgood**

Owner Hawaiian Isle Real Estate,  
Kona, Hawaii

“When I began my real estate business, I decided to target people on the mainland who’d bought a property here in Kona, but never again heard from their agents,” says Gretchen Osgood, owner of Hawaiian Isle Real Estate.

“So, I put together a printed newsletter and began mailing it out. That was 15 years ago. It’s still the only advertising I do and all my new business is generated through it.”

And even though Gretchen has now created an Act! emarketing version she emails out, her physical newsletter is still appreciated by her generally older target market.

## Act! – the best CRM

With her business growing quickly, Gretchen knew she needed a CRM that would not only store all her client’s information but also to manage the complex details that are at the center of every property sale. “So, I just Googled ‘best CRM’ and up popped Act!. I liked what I saw and now it’s become the absolute focus of my entire marketing program,” says Gretchen.

But while it's indispensable as a contact management system, it's in managing the sequence of critical deadline-related tasks when Act! truly comes into its own.

"I'd read Michael Gerber's book 'The E-Myth', so when my assistant retired, I got her to write down every single thing she did and from that I created lists of activities associated with each aspect of my business and scheduled them into Act! It's these activity lists that are the absolute backbone of my business and little about them has changed over the last ten years. And even though this took a lot of work to set up, it was very profitable work."

## 'Impossible' sales volumes achieved

Act is the 'secret sauce' that separates her from virtually all other real estate agents around her who have nothing similar in place. "I'm good at what I do because I have an incredibly thorough system with Act! right at the core of my business," says Gretchen.

How effective is it?

In the first four months of the year and with no attempt or intention of doing so, astonishingly Gretchen did an entire year's worth of business!

"In that time, as one deal closed another would take its place, so all through that quarter I was consistently handling 21 to 22 contracts. I certainly couldn't have done what I did without my system in Act!. It was the only way to stay on top of what would otherwise have been chaos."

Just to put that in perspective, Gretchen thinks that most real estate agents working without a CRM could handle just five to seven contracts simultaneously.

These figures are even more impressive when you consider that she wasn't only selling real estate during this period, but also managing 30 or so properties for their owners as well. Not surprisingly perhaps, Gretchen is the number one agent in her geographical territory for transactions."

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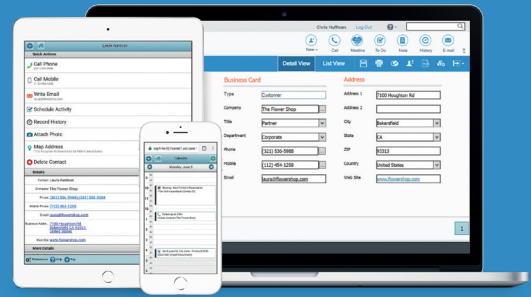
## Act! handles massive 'to-do' list

"When you've got over 20 contracts all pressing down on you, you have to be able to push paper out as fast as it can go without missing anything," says Gretchen, "When you have as I did on some days, as many as 150 things on your 'to-do' list, there's no way you could keep track of all that in your head or even on an Excel spreadsheet."

With the value of each sales transaction anywhere between \$200,000 and \$700,000, there's also a fair amount of potential liability resting on Gretchen's shoulders, who has a fiduciary responsibility to always be working in her clients' best interests. Fortunately, Act! creates the historic paper trail that shows who did what and when for the entire transaction.

Gretchen manages to do this volume of business just with the help of two part-time assistants, one of whom customises Act! by adding in new fields and making changes to templates. However, any upgrades or new version implementations are done by Act! Channel Partner, Keystroke.

Despite the evidence of her success, Gretchen seems to be the only one in her real estate community who's using something like Act!, so while they miss out Gretchen will be saying 'aloha' to her next satisfied client.



## Results

- Thanks to her unique Act!-based system, Gretchen has been able to complete up to 150 'to-dos' in a day, often these are time-critical and essential to keep a sale moving forward.
- Without a CRM like Act!, most real estate agents can handle 5-7 contracts at once, but that would be a very busy, full-time load. With Act!, Gretchen was able to stay on top of 22! This has enabled her to become the number one real estate agent for transactions in her territory.
- Gretchen is now using Act! Marketing Automation to create drip emailing campaigns so she can stay even more connected with her potential clients.
- She has also used Act! to automate her newsletter sign up so someone's information is seamlessly uploaded into her database, which then triggers one of her activity schedules.
- Act! also makes Gretchen super-efficient, which means that she can do all the inspections and title searches involved in a property sale or purchase ahead of time.

## Contact Act!

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