Address Database Case Study

About Alice Charron

Alice Charron is a Keller Williams realtor located in Brentwood, TN.

Being a Williamson County native, Alice's objective with each client is to move make their move as smooth and stress free as possible. It is important for Alice's clients to achieve their goals by selling their home for the best possible price and finding the right home for their lifestyle.

Business Need

To be successful in real estate, realtors must be able to keep in contact with their existing clients and to keep track of prospects.

Alice needed a way to track details about prospects (like what geographical area they wish to purchase a home in, hobbies, children's names, etc.) If Alice had a way of tracking this information, it would allow her to better serve her clients.

Alice distributes a fun monthly newsletter that contains interesting stories, facts and some information on the real estate market in Brentwood, TN. To quickly distribute the newsletter, Alice needed a program that could print mailing labels based on specific criteria (geographic areas, hobbies, etc).
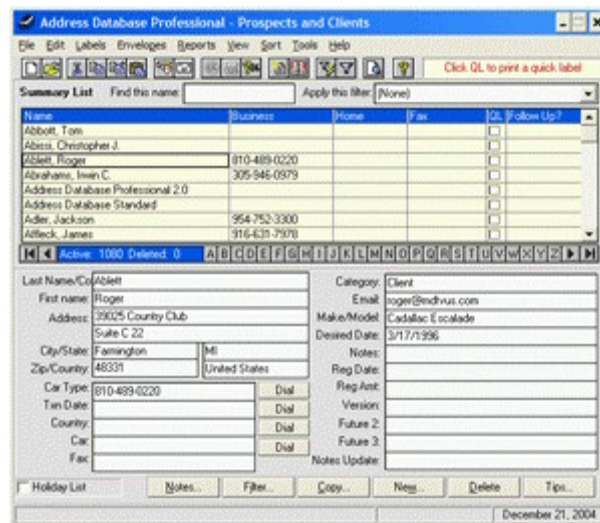
Solution – Address Database Professional

After searching the Internet for contact management software, Alice found Address Database Professional met her needs.

Alice chose Address Database because of it's ease of use and because the features were exactly what she needed to manage all her prospects and clients.

By using the filtering feature of Address Database, Alice easily lists the prospects and clients that meet specific criteria.

For example, she will filter just the prospects in a specific geographical area of Brentwood and that are flagged to receive the monthly newsletter (Alice set up a user defined field to flag prospects to send newsletters to).

"Filtering was the driving reason I chose Address Database. You don't have to be an expert to quickly filter the list of names you wish to send newsletters to. The program is really user friendly and has made creating and distributing newsletters painless," says Ms. Charron.

With the holiday season looming, Alice decided to use the Holiday List in Address Database to quickly flag the prospects and clients that she wanted to send a list of holiday cards to. This allowed Alice to print mailing labels for just the people in her Holiday List.

"Sending cards this year was much easier than years past. I was able to simply flag the people I wanted to send cards to, then filter the list to just those on my Holiday List and click Print Labels. It was very fast and easy to use.", adds Charron.

Alice also uses the Notes feature in Address Database to keep detailed notes about each prospect and client. If a client calls in and asks for something specific, Alice keeps detailed notes about the client. This allows Alice to easily remember the things she has talked to each prospect and client about.

More Information

For more information about Alice Charron, please visit her web site at http://www.callalice.com/.

For more information about Address Database Professional or Pragmatic Software Company, please visit them at http://www.AddressDatabasePro.com/ or http://www.PragmaticSW.com/.