



## Windows Mobile Customer Solution Case Study



**Customer:** RE/MAX Excalibur  
**Web Site:** [www.yourpremierteam.net](http://www.yourpremierteam.net)  
**Customer Size:** 6  
**Country or Region:** United States  
**Industry:** Real Estate

**Partner:** 4SmartPhone  
**Web Site:** [www.4smartphone.net](http://www.4smartphone.net)

### Customer Profile

RE/MAX Excalibur is a residential real estate franchise in Arizona. Your Premier Team, one of their units, is based in Scottsdale. The team's four listing agents handle about 75 sales transactions a year.

### Software and Services

- Windows Mobile 6
- Microsoft Office
  - Microsoft Office Outlook 2007
- Services
  - Microsoft Exchange Hosted Services

### Hardware

- T-Mobile Dash Smartphone

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[www.microsoft.com/casestudies](http://www.microsoft.com/casestudies).

## Improved Efficiency Saves Realtor \$300 Per Day, Boosts Referrals with Mobile Solution

"Windows Mobile has helped me streamline my business and respond to my customers immediately."

Kris Anderson, Team Leader, RE/MAX Excalibur

*Realtor Kris Anderson, a team leader for RE/MAX Excalibur, scarcely had time during workdays to respond to e-mail messages, forcing her to work late many evenings. Paper-based documents also slowed her down. After switching to a Windows Mobile® phone and Microsoft® Exchange Hosted Services, Anderson moves fast, handling e-mail and transactions while on the go. Client referrals have increased, she is saving money, and she enjoys a better work-life balance.*

### Business Needs

Realtor Kris Anderson, Team Leader for Your Premier Team, a RE/MAX Excalibur franchise in Scottsdale, Arizona, worked hard with home buyers and sellers while also managing her team of five realtors and one assistant. "We are always in a state of urgency," Anderson says. Answering e-mail messages during the workday was almost impossible, as Anderson was gone from the office most of the day visiting homes with her clients. She'd rush back to her computer in between appointments and face a backlog of 75 to 125 messages, with only one hour to answer them. "Those e-mail messages might be from someone inquiring about a property or a team member handling a deal,"

says Anderson. "It would take three to four hours before I could get back to them."

Communication delays can damage a realtor's business. "A prompt response is the number-one thing a customer wants when they're choosing a realtor," says Anderson. "If we don't respond within 30 minutes, we'll lose the client. The main reason teams fail is because their customer leads aren't being worked promptly."

Slow responses affect both home-selling clients and potential buyers. "When a listed seller has a leak or something else wrong with their property, the first person they contact is their realtor," says Anderson. "They



might send an e-mail saying 'I need your help.' Answering them quickly is just crucial."

Additionally, Anderson's team used a cumbersome paper-based system for contracts and other home-sale documents. "We had the forms in the back of our cars," she says. "I'd have to rush back to the office and fax them."

Anderson was overwhelmed. She often worked 14 hours a day or more. "I worked from 6:00 in the morning until dinner, and then answered my e-mail for several hours [in the evening]," she says. "It was not a sustainable situation."

## Solution

Anderson met with the owner of 4SmartPhone, a local mobile services company, to discuss an affordable and effective solution. "The owner showed me Windows Mobile® and introduced the whole idea of Direct Push Technology and hosted Exchange services—getting my e-mail sent to my phone, even as I'm showing houses," she says. Direct Push Technology enables users to synchronize information in the Microsoft® Office Outlook® messaging and collaboration client directly with Microsoft Exchange Server e-mail messaging and collaboration software, so they can keep their e-mail, calendar, tasks, and contact information updated while on the go. A hosted service means that a provider lets businesses use its own Exchange Server for a monthly fee.

Anderson realized she actually had plenty of time at her disposal. Her showing style is to let potential buyers look through a house by themselves, while she waits unobtrusively in the kitchen. "Some people take an hour to go through one house," she says. "Out of an hour showing, I might have 50 minutes when I'm

not using my time well." If Anderson could use her phone to take advantage of this time by answering her e-mail, she could be a lot more productive.

She also realized that she could use a phone with Internet connectivity and a browser to access Internet-based tools for realtors, such as the Multiple Listing Service (MLS) and ZipForm Online, a real estate contract software program that would let her create documents online and send them to clients as PDF files attached to e-mail messages.

Anderson compared Windows Mobile with a BlackBerry- based solution. "The monthly fee for services using a BlackBerry was higher than for Windows Mobile phones," she says. "Windows Mobile was clearly more cost-effective." Anderson purchased a T-Mobile Dash Smartphone with Windows Mobile 6, and signed up with 4SmartPhone for Microsoft Exchange Hosted Services. Many of her team members have also started using Windows Mobile phones.

## Benefits

Anderson's efficiency and work-life balance have greatly improved, and her customers are happier. "Windows Mobile has helped me streamline my business and respond to my customers immediately," she says.

### Streamlined Communication Improves Efficiency

Anderson no longer rushes back to the office in between appointments. While clients are touring a home, she answers e-mail messages in the kitchen. "I can get a buyer's offer and send it right to the seller through e-mail," she says. "I can pass a lead to one of my team members, or review a listing flyer."

Anderson also handles transactions much more efficiently. "I can set up documents on my phone with ZipForm Online and e-mail them to clients," she says. "Clients can even sign forms on my [touch screen] smartphone."

### Faster Responses to Customers

Quick responses boost client satisfaction. "If you're prompt in answering your customer's questions, they know that you care and they're willing to give you a referral," says Anderson.

Anderson runs a more competitive shop, holding herself and her team to a higher standard. "If I pass a lead to a team member, I'll say that if I don't get a response within 15 minutes, I'm forwarding it to another agent," she says.

Faster responses to customers have led to increased referrals. "Before, 81 percent of my business was referral-generated repeat business," Anderson says. "Now it has gone up to 92 percent."

### Mobile Communication Saves Time, Improves Work-Life Balance

Anderson's workday is shorter. "I shut my phone off at 7:00 in the evening, right there shaving off five hours of my day," she says. "I'm saving about \$300 a day after expenses. I've gone from taking 10 vacation days a year to 72, because I can bring my Windows Mobile phone with me."

"I'm working a regular day now, which is invaluable," Anderson says.