# Your Business Is Your Database

## A Guide to ProManage
## Contact Management

Bryon Ellington

Powered by eAgentC and TOP PRODUCER

# *Before You Get Started*

Dear Associate,

Congratulations on your decision to build your business through a contact management program. All great businesses do this—so you're in awesome company.

To successfully complete this operations guide, you will need:

1.  An Internet-ready desktop or laptop – because TOP PRODUCER 7i is a web-based software, you will need to have Internet access to use it.

2.  Your contact database – this guide will show you how to effectively communicate with your contacts in TP 7i. To avoid having to manually re-enter your existing database, you may be able to import your contact records directly from any software you are currently using. If you use a paper filing system to keep track of your contacts, you will need to enter them manually.

3.  Your lead generation goal numbers – comparing the number of contacts you currently have to the number of contacts you need to reach your desired production levels will help you establish a goal for adding the necessary contacts to your database each day. This goal will drive your day to day activities and help you to incrementally build a powerful database that drives your business.

    Use the "MREA Lead Generation Model" spreadsheet (available for download from the Free Materials section of KellerWilliamsUniversity.com) to determine your lead generation goal numbers. The spreadsheet allows you to input your closed sales goal and work backward to obtain the number of contacts you need in your database.

Yours in the name of training excellence,

Bryon Ellington

KWU Course Development Lead

P.S. – Our goal at Keller Williams University is to provide our associates with training that is irrefutably brilliant. Although we have dedicated a lot of time and effort to ensuring that this guide meets those standards, we recognize that the true measure of its effectiveness will be in your implementation. Please write us at KWU@kw.com with any suggestions or feedback that you may have to improve this manual. Thanks and best of luck!

# *Acknowledgements*

The author gratefully acknowledges the assistance of the following individuals in the creation of this course:

| | |
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# NOTICES

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YOUR BUSINESS IS YOUR DATABASE

# *Chapter 1: Your Business Is Your Database*

## Objectives:

*[1]*  *Discover that your business is your database.*

*[2]*  *Discover the many aspects of a real estate transaction that can be systematized through TP 7i.*

*[3]*  *Identify the daily, weekly, monthly, and yearly activities involved in working your database.*

*[4]*  *Identify the steps to setting up and customizing your database.*

# *The Four Laws of Lead Generation*

| Truth |
| :---: |
| **The size of your real estate business over time will be in direct proportion to the size and quality of your database.** |

Your ability to generate leads—and therefore, grow your business—is tied to your ability to amass and systematically market and prospect to a large database of contacts.  This is why we say, "Your business is your database."  The following four laws will help you maintain your focus on daily lead generation:

| The Four Laws of Lead Generation |
| :---: |
| *1.*    Build a database. |
| *2.*    Feed it every day. |
| *3.*    Communicate with it in a systematic way. |
| *4.*    Service all the leads that come your way. |

*"Start out in real estate with the right habits by using a contact management program everyday."*

RICHARD BASS
THE BASS GROUP
BOCA RATON, FL

When Steve Chader's first assistant left him to home-school her children, he had a problem. "I was stuck," he says.  "We had created a paper database filing system.  But without her, I was lost, because the system was in her head."

Steve quickly turned to contact management software.  "My goal was to have the computer do the work my assistant used to do," he explains.  Steve's new database software allowed him to systematize the way he managed contacts, which was important when it came time to make his next hire.  "By having a database and a system to use it, I was able to hire an assistant and train them much more quickly."

Today, Steve attributes a lot of his success to his database.  "Our database allowed our team to grow, because it kept us all to be on the same page.  We used it to sell over $40 million in real estate—and that's back when our average sales price was only $125,000!"

Contact management software really works—just ask Steve.

*(continued on the next page)*

# The Four Laws of Lead Generation

I n 1994, Bruce Hardie, of The Hardie Group, started in real estate with a database of twenty people—ten of them were his in-laws. Comparing his database at the time to other agents' databases, he says "I had a bad case of database envy." He knew that if he was going to make it in this business, he had to add everyone he met to his database and start communicating with them. One of the contacts he added was a car salesman from whom he bought a car that same year. Although Bruce didn't speak to him for another ten years, the man received regular mailers from Bruce through his database marketing campaigns. In 2004, that consistent communication paid off when Bruce sold the man a $350,000 home.

Bruce says he learned a lot about consistent communication from that. But what really drove the point home to him was when he realized that, in those same ten years, he had bought four new cars. However, he didn't buy any of them from that salesman. The fact was that, although the salesman had all of Bruce's contact information, he never once contacted Bruce. So when it came time to buy a new car, Bruce never thought to give the salesman a call.

Now, eleven years later and with a database of over 4,200 contacts, Bruce and his team, The Hardie Group, are putting those lessons to work and seeing the results. Through implementing a systematic lead generation program, he has seen his business go from 108 transactions in 2002 to 249 in 2004. And he believes he can double that number within just a few more years of consistent database management and marketing.

Contact management really works—just ask Bruce.

Managing the large number of contacts necessary for massive lead generation is neither practical nor cost-effective unless you are using contact management software (CMS), such as TOP PRODUCER 7i. CMS allows you to effectively leverage yourself in lead generation and provides many benefits:

1. It gives you quick access to your contacts for lead generation and business needs and PDA synchronizing and Web-based versions, so your database can go where you do.

# The Four Laws of Lead Generation

2.  It provides easier marketing, with automated templates for flyers, letters, labels, envelopes, emails, postcards, presentations, and more and an exportable database file you can send to a direct mail service from your desktop.

3.  It gives you activity reminders for action plans for ongoing relationship building with your contacts.

4.  It is a centralized location to store all information about your contacts. Not only does this help organize individual agents' files, but a web-based CMS allows team members to access the information simultaneously and from anywhere through any Internet-ready computer.

5.  It gives you the ability to assign activities to team members for workflow management.

W hat makes a trip to the dentist even more painful than usual? For Gary Ubaldini, of the Gary and Nikki Team, it was finding out that his dentist of 15 years had just listed his $650,000 home with another agent. Upset that he didn't get the listing, his first thought was, "I don't care if my teeth rot out—I'm never going to that dentist again." But the truth of the matter was obvious. "It was my fault," he admits, "I never asked him for business."

To make matters worse, Gary sent the dentist an invitation to their eighth annual client appreciation party featuring their yearly silent auction. When the dentist found out that the auction was to benefit the Children's Miracle Network, he told Gary that had he known about it before then, he would have gladly donated some of his dental services to the auction to help out. "So there I was with egg on my face again," Gary explains.

Determined not to let another opportunity pass him by, Gary added him to the team's database and began marketing to him. As luck would have it, the dentist's listing expired. And because Gary had been marketing to him, the dentist listed with the Gary and Nikki Team. Forty-five days later, the listing was sold, and Gary had something to smile about.

Contact management really works—when you do it. Just ask Gary.

# *Managing the Life of a Transaction*

## Leveraging TOP PRODUCER 7i

In the life cycle of a real estate transaction, you can leverage TP 7i to help you with:

**1. Generating Leads**

- **Lead Generation Plans**
  - 12 Direct
  - 8 x 8
  - 33 Touch
- **Marketing**
  - Letters
  - Postcards
  - Mass Mail
  - Envelopes
  - Labels
  - Database Exporting
- **Prospecting**
  - Calls
  - Emails
  - Appointments

**2. Managing Leads**

- **Funneling Leads**
  - Email
  - Website
  - IVR system
  - Phone
- **Assigning Leads**
  - Database Groups
  - Database Action Plans
  - Tasks to Team Members
- **Sourcing Leads**
  - Lead Sources
  - Referrals
- **Tracking Leads**
  - Lead Follow-Up
  - Leads per Source
  - Leads to Closed Business
  - Referral Management

**3. Converting Leads**

- **Consulting Sellers**
  - Scheduling Listing Appointments
  - Listing Presentation Packet
- **Consulting Buyers**
  - Scheduling Buyer Consultations
  - Buyer Consultation Packet

**4. Servicing Clients**

- **Servicing Sellers**
  - Managing Listing Files
  - Listing Action Plan
  - Creating Property Flyers
  - Collecting Showing Feedback
  - Listing Service Reports
- **Servicing Buyers**
  - Scheduling Buyer Tours
  - Buyer Action Plan
  - Buyer Services Checklist

**5. Managing Transactions**

- **Coordinating Closings**
  - Managing Closing Files
  - Closing Action Plans
  - Closing Service Reports

# *Working Your Database*

In order to build and maintain a powerful database, you will need to set aside the time necessary to purposefully work on it and plan what database activities you will accomplish during this time.

## Time on Your Business

When Richard Bass joined wife and business partner Gail's team twelve years ago, Gail was running a very successful real estate business. Unfortunately, with the paper-based system they were using at the time, they didn't really know where their business was coming from. "Without knowing where your business is coming from, you have no way of knowing where you are getting the best return on investment for your marketing dollars," says Richard. Realizing this, Gail and Richard purchased TOP PRODUCER, and Richard spent the next two months taking all of the data from the past six years of Gail's business and entering it into the program.

By tracking their business in their database, Gail and Richard were able to discover that they were only spending 1% of their marketing budget on their sphere of influence, which accounted for almost all of their business. In order to create "raving fans" out of these contacts and generate more repeat and referral business, they quickly instituted marketing programs for their sphere using their contact management software.

As a result, The Bass Group has grown their repeat and referral business dramatically in the past twelve years. They've also grown the amount of new business they receive to account for more than 30% of their closed sales by entering prospects into their database and using it to keep in touch with them. As Richard puts it, "All of this is database driven. We couldn't be doing this if we didn't have a system to keep in touch with these people and track our business."

Contact management really works—just ask Richard and Gail.

# Working Your Database

*Time on Your Business (continued)*

Unfortunately, many agents think of working on their database as something to be done when their business allows it, if at all. But top agents understand that time spent working on their database IS time spent working on their business. Remember, the consistent success of your business over time is directly dependent upon the effectiveness of your lead generation. And the effectiveness of your lead generation is directly dependent upon the size and quality of your database.

The secret to building a strong database is this: continuously developing and updating your database as if you were going to sell it someday and retire on the proceeds. As a result, each day, you should be:

- Completing the daily activities that are due in TP 7i

- Adding new leads, updating your contact records and notes, and scheduling follow-up activities in your database

It takes time, and it takes focus—but it is this simple.

## Jealously Guard This Time

To reach the highest levels of success in real estate, your lead generation time must be considered the most important time on your calendar. To avoid being entangled and pulled back into the day-to-day administrative, service, and personnel issues that eat away at your time:

1. Make a commitment to block off substantial, regular time in your calendar, and devote it to lead generation. This is time for you to prospect, follow up on existing leads, and develop and implement marketing and prospecting plans.

2. Schedule it early in the day, so it gets done first.

3. If you erase, you must replace. If you must do something else during this time, replace it with equal time on your calendar later that day or week.

**And if you have a team…**

4. Communicate to your team members that this time is off-limits unless it is an emergency.

5. Delegate, train, and consult; but let others handle the details. And hold them accountable for handling these details.

6. Assign a gatekeeper to keep your 80% at bay.

*"The time you spend following up with past clients is the best investment you can make. Schedule time each day to communicate with them. They are the core of your business."*

*DAN HARKER
THE HARKER FIVE-STAR TEAM
DALLAS, TX*

## *Working Your Database*

*Time on Your Business (continued)*

When it comes to massive database marketing programs, you might think that the marketing pieces have to be impersonal. However, with a database of over 3,400 contacts, The McKissack Group knows that by targeting groups within their database they can send out marketing pieces that hit home with their contacts. And on one occasion, they learned just how much of an impact their marketing program had with one contact.

One of the pieces that they send out as part of their database marketing is their yearly calendar. Their calendar has been very successful in the past, bringing them great results. But this time it brought one result that they never expected.

A short time after sending out their calendar, they received a letter from an 86 year-old woman who was part of their database. The woman had written to thank them for the calendar, explaining how much she looked forward to it each year. She then went on to tell them that she had made arrangements to have the McKissacks represent her estate. Even though she is one of over 3,400 contacts that they regularly touch, their targeted messages add value to her life and make her feel that she is always on their mind, and she wanted to repay their thoughtfulness.

Wow! Contact management really works and can impact people in amazing ways—just ask Brad, Linda, and Jimmy.

*Working Your Database*

# Your Daily Dashboard

Your day-to-day interaction with TP 7i will revolve around its **Today's business** feature.  Once you have launched an action plan or scheduled individual activities, those activities will come due in the Today's business screen.  This is the first screen you will see everyday when you login to TP 7i (see pg. 68).  At a glance, you will see any new leads and all of the various activities that you must do for the day.  Everyday, you will:

**1.**
View scheduled activities for any date range

**2.**
View activities assigned to you, one of your team members, or all of your team

**3.**
Check for new leads funneled automatically from your website or IVR

**15.**
Print scheduled labels one at a time or batched

**4.**
Check your appointment reminders

**14.**
Print scheduled envelopes one at a time or batched

**Today's business 01/07/2005**

**Define your search criteria and then click "Start search".**

Date range  01/07/2005  assigned to  Keller Agent1  ▼  Start search

**13.**
Send emails out automatically or manually as part of your action plans

**Activities**

| Leads | 13 |
| Appointments | 0 |
| To-dos | 3 |
| Calls | 22 |
| Listing to-dos | 33 |
| Closing to-dos | 17 |
| Service reports | 1 |
| Referrals | 4 |
| Letters | 75 |
| Postcards | 9 |
| Emails | 6 |
| Envelopes | 8 |
| Labels | 5 |

**5.**
Check for one-time or recurring reminders for tasks or events

**6.**
Make phone calls to your contacts as part of your activity plans

**12.**
Send postcards as part of your action plans

**7.**
Execute listing action plan activities

**11.**
Mail letters as part of your action plans

**10.**
Track referrals' progress through their transactions

**9.**
Notify clients of completed activities and showing feedback

**8.**
Execute closing action plan activities

*(continued on the next page)*

*Working Your Database*

# Database Duties of an Agent

An effectively used database will manage your time around the following recurring duties:

**1  Daily Duties**

*1.* Add _____ new contacts (see *MREA: Business Planning* course)
*2.* Manage new leads
*3.* Keep appointments
*4.* Make calls
*5.* Send and receive emails
*6.* Schedule follow-up activities
*7.* Manage listings and closings
*8.* Complete tasks

**2  Weekly Duties**

*1.* Send letters, postcard, and mailers
*2.* Send listing service reports/make calls to sellers

| M | T | W | Th | F | Sa | Su |
|---|---|---|----|---|----|----|

**3  Monthly Duties**

*1.* Send monthly mailers and emails
*2.* Maintain contact records

| 1 | 2 | 3 | 4 | 5 | 6 | 7 |
|----|----|----|----|----|----|----|
| 8 | 9 | 10 | 11 | 12 | 13 | 14 |
| 15 | 16 | 17 | 18 | 19 | 20 | 21 |
| 22 | 23 | 24 | 25 | 26 | 27 | 28 |
| 28 | 30 | 31 | | | | |

**4  Yearly Duties**

*1.* Send seasonal mailers
*2.* Review and update contact records
*3.* Review effectiveness of lead sources
*4.* Develop and implement business plan

| Jan | Feb | Mar |
|-----|-----|-----|
| Apr | May | Jun |
| Jul | Aug | Sep |
| Oct | Nov | Dec |
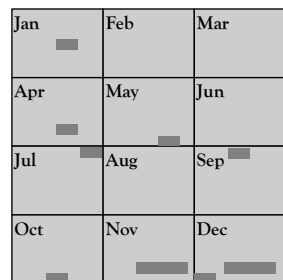
*Working Your Database*

# Database Duties of a Team

An effectively used database will manage your team's time and workflow around the following recurring duties:
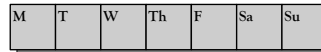
## ❶ Daily Duties

1. Add _____ new contacts (see *MREA: Business Planning* course)
2. Manage new leads
3. Keep appointments
4. Make calls
5. Send and receive emails
6. Schedule follow-up activities
7. Manage listings and closings
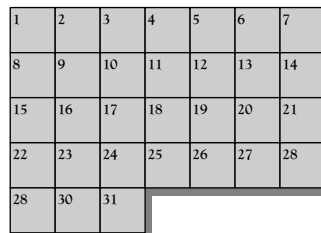8. Complete tasks

## ❷ Weekly Duties

1. Send letters, postcard, and mailers
2. Review lead follow-up
3. Review progress of listings and closings
4. Send service reports/make calls to sellers

## ❸ Monthly Duties

1. Send monthly mailers and emails
2. Maintain contact records
3. Track closed business
4. Review team performance
5. Schedule staff training

## ❹ Yearly Duties

1. Send seasonal mailers
2. Review and update contact records
3. Review effectiveness of lead sources
4. Review of marketing and presentation materials
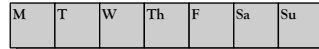5. Develop and implement business plan

*"I transitioned from being a real estate agent to a real estate business person, and it couldn't have happened without using a database."*

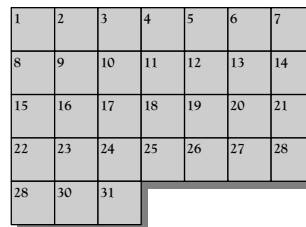*STEVE CHADER*
*THE CHADER TEAM*
*MESA, AZ*
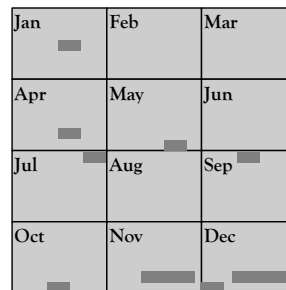
# *Steps to Setting It Up*

Keller Williams Realty now offers a customized version of TOP PRODUCER 7i (TP 7i).  The version has all of the standard features of TP 7i plus Keller Williams Realty's 12 Direct, 8 x 8, and 33 Touch action plans, marketing templates (e.g., letters, flyers, etc.), and templates for buyer and listing consultations.  And all KW associates are eligible for industry-best discounted pricing on TP 7i (pricing is available on the KW Intranet).

Below is a checklist for setting up your TP 7i database.  The checklist will take you through entering your information and contacts and customizing the plans and marketing material.  You will also set up automated lead capture and plan assignment for leads from your website.  When you are ready to get started, use the checklist as your guide to finding any needed instructions in this manual on how to perform each step of the setup.

**❶ *Getting Started***

   ① Purchase your TP 7i subscription (see pg. 16)   ❑

   ② Login (see pg. 17)   ❑

   ③ Create your account (see pg. 18)   ❑

   ④ Set up your email (see pg. 22)   ❑

   ⑤ Enter contacts   ❑

      ① Import contacts from another database (see pg. 24)   ❑

      ② Create individual contact records (see pg. 38)   ❑

**❷ *Customizing Your Database***

   ① Customize marketing material in the Communication library   ❑

      ① Create template categories (see pg. 47)   ❑

      ② Create/edit templates (see pg. 47)   ❑

   ② Customize your action plans (see pg. 54)   ❑

   ③ Automate website lead capture   ❑

      ① Create/edit website lead capture forms (see pg. 92)   ❑

      ② Post lead capture forms to your site (see pg. 94)   ❑

      ③ Automatically apply action plans to leads (see pg. 96)   ❑

Your TP 7i database is now set up and ready to go.  On a daily basis, TP 7i will keep you on track by reminding you to complete the necessary activities that will help you take your business to the next level.

*"Your TOP PRODUCER program is your best tool in managing and leveraging lead generation. Invest the time to learn how to let the program work for you."*

*MARY HARKER*
*THE HARKER FIVE-STAR TEAM*
*DALLAS, TX*

YOUR BUSINESS IS YOUR DATABASE

# *Chapter 2: Setting Up Your Database*

## **Objectives:**

**[1]** *Purchase your subscription to TOP PRODUCER 7i.*

**[2]** *Use the TOP PRODUCER Setup Wizard to set up your agent account and any assistant licenses (for individual agents and agents with assistants).*

**[3]** *Use the TOP PRODUCER Setup Wizard to set up your team roles (for teams).*

# *Getting Started*

L ike many agents, Jan Richey, of The Jan Richey Team, went the low-tech route when she first created her database. "Before I found Top Producer many years ago, my database was in a recipe box on 3x5 cards!" Jan laughs. At the time, her system fit her needs. However, as Jan's business grew, it became clear that her method of maintaining her database required too much of her time. "I determined anything and everything that happened with my database. I didn't feel comfortable with surrendering any part of it," she says. But with business booming, Jan couldn't spend all day in front of a recipe card box.

Knowing that in order to meet the demands of her business she needed a better system, Jan began looking at contact management software. "Then I learned about TOP PRODUCER," says Jan. "Once I put it into use, I was hooked."

With contact management software, Jan now has a database system that her team can easily use and that keeps them highly organized. And with Jan's busy schedule, one of her favorite features is the ability to take her database with her on her Palm. "With the Palm software, I'm able to maintain a very efficient calendar system that helps to manage the demands of a very hectic schedule."

Contact management really works to get you organized and grow your business —just ask Jan.

## Subscriptions

TP 7i offers a variety of ways to set up your account depending upon the size of your business:

1.   **Individual agent subscription**

   For individual agents who have not yet hired anyone into their business.

2.   **Agent with assistant(s) subscription**

   Typically for agents who have hired administrative assistants. In addition to the agent account, you will need to purchase assistant licenses. You can also purchase assistant licenses for your Buyer and Listing Specialists. TP 7i allows you to control your assistant's access to your email and scheduler.

# *Getting Started*

3. **Team/Partner subscription**

   For agents with a team of assistants and Buyer and Listing Specialists, this option provides all of the same functionality of the agent with assistant licenses subscription, and it also gives you specific fields for your team name, logos, and photos. To purchase a Team/Partner account, you must also purchase a minimum of 2 agent licenses.

   **NOTE:** *If you market your business as a team, then you may consider buying the Team/Partner subscription. For more information, contact TOP PRODUCER at 1-866-459-7891.*

## Teams

If you have a team working for you, you should consider purchasing assistant licenses and/or additional agent licenses. Having these licenses allows your team to:

1. All use the TP 7i program at the same time and from any Internet-enabled computer

2. Have their own TP 7i email account, allowing their email correspondences to be stored in the history file of the contact record

3. Have their own personal scheduler that can be checked and updated by other team members

4. Assign follow-up activities to others and take advantage of the Today's Business feature of TP 7i

5. Enter notes into a contact's record with the team members name stamped on the note for ease of tracking contact follow-up

> **"***Your contact management system should be the central nervous system of your day-to-day business..***"**
>
> *DAVE HERRIES*
> *THE REALTYCOLORADO TEAM*
> *DENVER, CO*

# Getting Started

## How to purchase TOP PRODUCER 7i

To get the KW version of TP 7i, you will need to purchase it through the KW Intranet at http://intranet.kw.com.

> **NOTE:** *For the Team/Partner subscription, you will need to order TP 7i by telephone at 1-866-459-7891 (see pg. 26).*
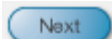
1. After you log in to the KW Intranet go to the **My Information** tab, and click on **My ProManage**.

2. Click **Subscribe Now** to go to the TOP PRODUCER product page.

3. Click on the appropriate subscription option.

4. Enter your contact information. Make sure to fill in the **Company name** field. `Next`
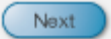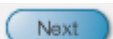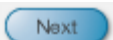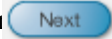
> **NOTE:** *In the **Company name** field, enter "Keller Williams." To the right of the field the Keller Williams Realty logo will appear. To get the Keller Williams Realty version of TP 7i, make sure the **I want TOP PRODUCER 7i customized for Keller Williams** box is checked.*
>
> *You must use your KW Email account to receive the KW version of TP 7i.*

5. Select the checkbox next to the subscription bundle you wish to purchase. For more information about the bundled packages, select **Click here for more information about the products offered on this page**.

> **NOTE:** *The featured pricing already includes the Keller Williams Realty discount.*

   Top Connector 7i allows you to access your local MLS to create CMA's directly through TP 7i. If you do not want **Top Connector 7i**, be sure to click on the box to uncheck that option. `Next`

6. If you have assistants for whom you wish to purchase additional licenses to use TP 7i, enter the **Number of assistants** you wish to purchase licenses for in the space provided. `Next`

7. Enter your credit card information. `Next`

8. Enter your login information. `Next`

9. Read the **TOP PRODUCER Subscriber Agreement**. If you agree to the terms, select **I have read and accept the terms of this agreemen** `Next`

10. Review your order to make sure that everything is correct.

11. A confirmation screen will appear stating that your login information will be emailed to you. `Finish`

*(continued on the next page)*

# *Getting Started*

## How to switch from TP 7i to the KW version of TP 7i

If you already have TP 7i and wish to switch over to the Keller Williams Realty version:

1. To get the KW version of TP 7i, you will need to go to the KW Intranet at http://intranet.kw.com.

   **NOTE:** *For the Team/Partner subscription, you will need to order TP 7i by telephone at 1-866-459-7891 (see pg. 26).*

2. Under the **My Information** tab, click on **My ProManage**.

3. Click **Switch Now** to go to the TP 7i product page.  Choose the appropriate option to switch to the KW version of TP 7i.

## How to get help

If you need help in purchasing, setting up, or using the KW version of TP 7i, you can get support at:

1. The TOP PRODUCER Support hotline (dedicated to KW associates) 1-866-337-2658.

2. https://www.topproduceronline.com

3. Support@topproducer.com

**NOTE:** *KW Support does not support TP 7i.  All technical questions should be directed toward the above listed support outlets.*

## How to login

After you have signed up for your TP 7i, you will receive a confirmation email with your login username and password.  Before you run TP 7i on your computer, make sure that any pop-up blocking software is disabled.  When you are ready to login:

1. Go to https://www.topproduceronline.com and enter your **Username** and **Password**.

   **NOTE:** *The "s" in https signifies that your TP 7i database is on a "secure" server and is protected.*

2. The first time you open TP 7i on any computer, a dialogue box will appear asking you to download "TOP PRODUCER Application."  You must download this application to access TP 7i from that computer.  Click **Yes**.

   **NOTE:** *By checking the **Always trust content from TOP PRODUCER** box, you will stop this dialogue box from popping up in subsequent logins.*

3. TP 7i will take a moment to load the first time; subsequent logins will be faster.

# *Using the Setup Wizard*

## The Setup Wizard Process

The first time you log in to TP 7i, you will be guided through the **TOP PRODUCER Setup Wizard**.  The setup wizard allows you to enter all of your information:

1.   Agent setup

2.   Assistant setup (if you have purchased any assistant licenses)

3.   Agent pictures setup

4.   Email setup

5.   Data transfer (importing contacts)

> **"***I find myself trying to do new things in TP.  More often than not, 'I wonder if it will work' turns into 'Look what I can do now!'***"**
>
> *CYNDI CUMMINGS*
> *LAKE TRAVIS, TX*

## Agent Setup

The Setup Wizard for TP 7i will first ask you to set up your own agent contact record.  Make sure to complete these fields correctly, as the letters, emails, property flyers, and other marketing material in TP 7i are automatically populated with your information (using merge codes) from your agent contact record.  Some fields have clickable pick-boxes to the right of them that contain standard choices for convenience.

### *How to create your primary agent record*

1.   In the Setup Wizard, click **Agent setup** in the left-hand navigation.  For future changes after you have completed the Setup Wizard, you can access the Agent setup from the top toolbar by clicking **Setup**>**Agent setup**.

2.   **Name details –** choose any designations you may have earned and the title you want to appear in your marketing to your clients (e.g., "Mrs.," "Dr.," etc.).  Also, enter your closing salutation (for letters, emails, etc.) or choose one from the drop-down menu.

> **NOTE:** *You can add choices to pick-boxes by clicking them open and selecting* **Modify list**. *Pick-boxes can also set them to* **Pop-up automatically** *when the screen is accessed, or they can be set to* **Insert data automatically**, *for fields such as* **State** *that do not tend to vary much from contact to contact.*

# *Using the Setup Wizard*

3. **Address details –** enter your address information as you would like it to appear on select presentations and marketing materials.

4. **Contact information –** enter your various phone numbers (parentheses and a hyphen are not necessary; TP 7i will automatically insert these for you), emails, and websites. Your **Personal website** is your business site. You may enter the **Company website**, which is KW.com or the URL of your Market Center's website if you wish to use either of these as merge codes.

   **NOTE:** *The email address that you list in the **Email address** field will be the email to which recipients of your emails will respond.*

5. **Office manager –** if you wish to use the name of your Team Leader in any of your presentation materials, you may enter it in this field.

6. Scroll down in your agent record using the scroll bar.

7. **Signature –** the **signature** field is automatically merged into both email messages and printed letters. Be sure to include your name (and team name if appropriate) and contact information.

   **NOTE:** *If you insert photos into your **Signature**, the photos will only be visible in emails. Letters that are populated with your **Signature** merge code (see pg. 46) will only display text. Instead of including your photo in your signature, consider using the merge code for your photo in your letter, postcard, and email templates (see pg. 47).*

8. **Additional TOP PRODUCER applications –** if you purchased subscriptions to any other TP products, be sure that the appropriate boxes are checked.

9. **Time zone –** use the drop-down menu to choose your time zone.

10.  Next

## Assistant Setup

If you have not purchased assistant licenses proceed to "Agent Pictures Setup" on pg. 20.

If you have purchased any assistant licenses, the Setup Wizard allows you to enter your assistant's information next. You will be able to limit your assistant's access to your database. However, if they will be handling the day-to-day administrative duties of your business, you may choose to give them full access to your database (including email) so that they can conduct business in your name.

## Using the Setup Wizard

*How to set up assistant accounts*



1.  In the setup wizard, click **Assistant setup** in the left-hand navigation. For future changes after you have completed the setup wizard, you can access the assistant setup from the top toolbar by clicking **Setup**>**Agent setup**.

2.  From the left-hand navigation, click **Create new.**

3.  **Login information –** create the username and password for the assistant and set their access privileges.

4.  **Name details –** enter the assistant's designations and closing salutations.

5.  **Contact information –** enter the assistant's contact information.

6.  **Signature –** this field is automatically merged into both email messages and printed letters.  Be sure to include the team member's name, your team name, and your team's contact information.

    **NOTE:** *Team members should be using the team name and contact information for any communication with contacts in your database.*

7.  ✅ **OK**

8.  Repeat for each team member using an assistant license.
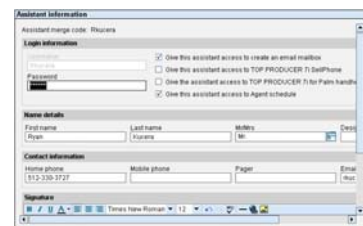
*"I recently added an assistant subscription; the ability to assign tasks has made TP even more powerful."*

*CYNDI CUMMINGS
LAKE TRAVIS, TX*

## Agent Pictures Setup

TOP PRODUCER 7i allows you to upload business photos and logos that can be automatically merged into any of your marketing materials and reports.

*How to add pictures and logos*



1.  The Setup Wizard will automatically take you to **Agent pictures setup**. For future changes to your agent picture or logo, you can click on **Setup**>**Agent setup**, and in the left hand-navigation click **Agent or assistant pictures** (to add photos for other Team members, see pg. 27).

2.  From the **Agent or assistant** drop-down menu, choose whether you are uploading pictures of you or your licensed assistant(s).

3.  **Agent or assistant picture –** click **Add** below this box to upload your or your assistant's photos to TP 7i.  In the dialogue box, browse your computer to select the file and click **Open**.  You may add multiple photos to your account.  Whichever photo is displayed in the preview pane will be the photo that is merged into your marketing material.  To scroll between photos, use **<<Previous** and **Next>>**.

    **NOTE:** *You may only upload .jpg format files.*

## *Using the Setup Wizard*

4. **Company logo –** click **Add** below this box to upload your company logo to TP 7i.  In the dialogue box, browse your computer to select the file and click **Open**.  You may add multiple photos to your account. Whichever photo is displayed in the preview pane will be the photo that is merged into your marketing material.  To scroll between photos, use **<<Previous** and **Next>>**.

   **NOTE:** *You can download Keller Williams Realty logos from* **KW Graphics** *under the* **Marketing** *tab of the* **KW Intranet**. *You may only upload .jpg format graphics.*

5. **Next**

## Email Setup

The main benefit of using TP 7i as your email manager is its ability to automatically store all incoming and outgoing email messages in the relevant contact's record. These messages are stored in the contact's record indefinitely, even if you delete the message from the email manager, making it easier to manage your Inbox and Sent folders.  In addition, Keller Williams Realty has created a variety of HTML email templates for TP 7i to use in your marketing.

The TP 7i email manager acts as an online email client that allows you to read and send email from any Internet-ready computer.  TP 7i allows three different email options:

1. Access your **@kw.com** email account or other POP3 email account through TP 7i to send and receive email for your existing account using TOP PRODUCER.  This option is best if you wish to route your existing email messages into the TP 7i email manager and for use with your @kw.com or @yourteamname.com.  If you choose this option, you will send and receive mail for that account in TP 7i.

2. Use an email through the @topproducer.com domain name (e.g., your_name@topproducer.com).  This option is suitable if you wish to create a new email address.

3. Do not use the TP 7i email feature at all.  This option is used when you do not want to use the TP 7i email manager to *receive* incoming email messages.  You may still *send* email through the TP 7i email manager for both individual and mass email. This option will use the email address listed in your agent contact record as your **From** and **Reply to** address.

   **NOTE:** *It is recommended that you route your existing POP3 email account into TP 7i (****Option 1****).  Doing so provides you with one program to handle all of your lead generation needs.  It also enables you to route multiple POP 3 email addresses to your TP 7i Inbox.*

# Using the Setup Wizard

*How to set up your email*

1.  The setup wizard will automatically take you to **Email setup** after you are done with **Agent pictures setup**. For future changes, in the top toolbar, click **Email>Email preferences**. Select **Email configuration** from the left-hand navigation.

2.  Select the email option you wish to use and proceed to the appropriate instruction based on your selection:

    a.  **I want to use existing POP3 email accounts –**

        i.   **POP 3 server –** for KW email, enter **mail.kw.com**. You will need to contact any other email providers for their POP3 server.

        ii.  **Port –** the port number for KW email is **110**.

        iii. **Username and password –** enter your KW email or other email account username (ex: if your email address is bobsmith@kw.com, enter only "bobsmith") and password.

             **NOTE:** *If the email address you POP into TP 7i is different from the email address you entered in your agent record, the* **Confirm email address** *prompt will ask you to enter the email address you wish to use as your* **From** *and* **Reply to** *address in your outgoing emails.*

        iv.  **Move to folder –** choose the folder in TP 7i that you want your incoming mail from this account to go to (typically **Inbox**). Or click on **Create folder** to create a special folder for email from this account.

        v.   **Leave mail on server –** by checking this box, TP 7i will only delete emails from the TP Inbox. The email will not be deleted in the POP3 account, so you will occasionally have to go into the POP3 account and delete your emails so space constraints don't prevent you from receiving email.

        vi.  **Only get new mail –** by checking this box, TP 7i will only receive new mail sent to the forwarding account. Older mail will not be sent to TP 7i.

        vii. **Next**

             **NOTE:** *To route additional POP 3 email addresses into TP 7i, in the top toolbar, click* **Email>Email preferences**. *In the* **Email preferences** *screen, click on* **External accounts**.
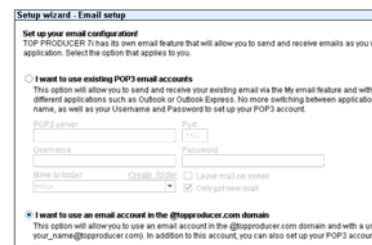
*(continued on the next page)*

# *Using the Setup Wizard*

> *In the **Accounts** screen, click on **Add a new account**. In the **Add a new account** prompt, enter the correct information and click **OK**. Repeat for any other accounts.*

   **b.  I want to use an email account in the @topproducer.com domain –**

   *i.*   Type in your desired email name. 🔵 **Next**

   *ii.*  The **Email setup** prompt will appear acknowledging that your email account has been setup.  Click **OK**.

   **NOTE:** *All email messages sent to your new @topproducer.com address will be received in the TP 7i email manager. If you wish to change your Reply To address for the email manager, you must update the email address field in your agent contact record.*

   **c.  I do not want to send and receive email using the My email feature –**  🔵 **Next**

   **NOTE:** *You will still have the ability to send flyers and email correspondence from the Email manager. All outgoing email will appear to come from the email address you specified in Agent setup.*

*3.*  If you choose to use TP 7i to send and/or receive email, after the setup wizard is complete, confirm that your account is set up correctly by sending a test message to yourself.

*4.*  In the top toolbar, click **Email>My email**.

*5.*  From the left-hand navigation, click **Compose** and **Send** a test message to your own email account.  Click **Check email** in the left-hand navigation.  Your test email should appear in your Inbox.

   **NOTE:** *TP 7i will not automatically check for new emails while you are in **My email**. If you are in **My email** for any length of time, you should occasionally click **Check email** in the left-hand navigation.*

# *Using the Setup Wizard*

## Data Transfer

If you do not have any data to import or wish to perform this function later, click ⊗ **Close** . The next step in the Setup Wizard is the Data Transfer. If you have contact information in other databases, you do not have to manually re-enter those contacts into TP 7i. TOP PRODUCER supports the importing of contacts from several different databases:

1.  Act!

2.  Goldmine

3.  Online Agent

4.  Outlook

5.  Outlook Express

6.  Prep

If you are transferring your database from a previous version of TOP PRODUCER or from any of the popular contact management programs mentioned above, the process is straightforward and takes little effort. In the case of transferring data from sources such as tax roll records, spreadsheet files, Palm device, or mailing lists, the process requires patience and previous experience with data mapping is recommended. It is suggested that you seek assistance or call the TP 7i support hotline (dedicated to KW associates) at 1-866-337-2658 for detailed instructions before importing these types of data files.

---

*How to import contacts from another database*

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If you were using another database and wish to import those contacts into TP 7i, be sure to first export your old database and save it to your computer. To import your old database:

1.  The setup wizard will automatically take you to **Data Transfer** after you have finished with **Email setup**. For future importing of data, in the top toolbar, click **Setup**>**Data transfer/conversion**.

2.  Choose the data transfer option you wish to use to import your database.

3.  ⊗ **Close**

    **NOTE:** *When you close the wizard, a prompt will appear asking you if you would like the wizard to appear every time you open TP 7i. If you do not need the wizard to automatically start, uncheck the* **Show this wizard...** *box by clicking on it and click* **Yes***.*

*(continued on the next page)*
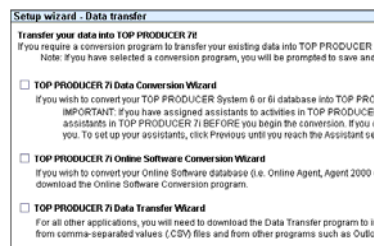
## *Using the Setup Wizard*

**4.** Proceed to the appropriate instructions based on your selection:

  **a. TOP PRODUCER 7i Data Conversion Wizard –**

   **i.** Click **OK** in the **Data Conversion from TOP PRODUCER Desktop** dialogue box.

   **ii.** Another dialogue box will appear for "TP Data Conversion.exe." Click **Save** and save the file to your computer.

   **iii.** When the **Download complete** dialogue box appears, click **Open**. Follow the Wizard.

  **b. TOP PRODUCER 7i Online Software Conversion Wizard –**

   **i.** Click **OK** in the **Data Conversion from Online Software Program** dialogue box.

   **ii.** Another dialogue box will appear for "TP Online Software Conversion.exe." Click **Save** and save the file to your computer.

   **iii.** When the **Download complete** dialogue box appears, click **Open**. Follow the Wizard.

  **c. TOP PRODUCER 7i Data Transfer –**

   **NOTE:** *If your database is not one of the databases that is listed by TOP PRODUCER but it can export to a .csv file, you will need to call 1-866-337-2658 to get the TP 7i Support (a dedicated support line for KW associates) to walk you through mapping the fields properly.*

   **i.** A dialogue box will appear for "TP Data Transfer.exe." Click **Save** and save the file to your computer.

   **ii.** When the **Download complete** dialogue box appears, click **Open**. Follow the Wizard.

**5.** TP 7i will send you an email informing you know that your database is being uploaded to your account.

  **NOTE:** *While TP 7i is uploading your contact database, your login access will be temporarily interrupted. Depending upon the size of your database, this will take anywhere from a few seconds to a few minutes or more.*

**6.** When your upload is complete you will receive a notification email from TP 7i. When you login into TP 7i, your contact records will be there. Review a few of the contact records to verify accuracy.

# Setting up Team Roles

A TOP PRODUCER team subscription allows you to create several different roles in your database for various team members. Creating roles not only allows your team members to document their work in the database, but it also allows you to automatically assign activities to various team members through TP 7i.

With the Team/Partner subscription, you can enter your team name, team logo, team photo, and team members' information and integrate this into your team marketing via merge codes.

### How to purchase assistant licenses

In order to add team members to your database, you must purchase additional subscription licenses:

1. In the top toolbar, click **Setup>My subscriptions.**

2. In the **Subscription Manager**, click **Purchase a new subscription.**

3. Choose the number of licenses and additional services you require.

4. **Next**

5. Complete the checkout procedure to add the new licenses and services to your subscription.

### How to sign up for a Team/Partner account

If you wish to purchase a Team/Partner account:

1. TP 7i does not support online purchasing of the Team/Partner subscription. To purchase this subscription, call 1-866-459-7891.

2. Ask for either the Team or Partnership subscription.

   **NOTE:** *There is no difference in functionality between Team and Partnership subscription. The only difference is the labeling of certain fields dealing with the name of the business (e.g., "Team name" vs. "Partnership name").*

3. Be sure to tell them that you are a KW associate and would like to purchase the Team/Partner subscription to the KW version of TP 7i.

*"All of our team members are required to learn the principles of effectively building and growing a database. It is our livelihood."*

*MARY HARKER*
*THE HARKER FIVE-STAR TEAM*
*DALLAS, TX*

*(continued on the next page)*

# Setting up Team Roles

4.  To purchase a Team/Partner subscription you must purchase 2 or more (including you) agent licenses.  You can purchase as many assistant licenses as you need.  If you wish to purchase additional licenses, you can do so during your order, or later online (see above).

## Setting up Your Team Database

Once you have signed up for your agent and assistant licenses, you can manage your team members through the primary agent account of TOP PRODUCER 7i.  Subscribing team members will have access to the database features based on your discretion.

The TP 7i Team/Partner subscription features a setup wizard that is identical to the wizard for an individual agent account (see pg. 18).  After you have gone through the wizard, you will need to set up the accounts for any additional *agent* licenses you purchased.  You are only creating their login information and access to certain applications.  The agents will enter their own contact information and photos.  If the account is for a Buyer Specialist or Listing Specialist, you will want to make sure that they are using the team's contact information.

### *How to set up additional agent roles*

To set up your team member accounts:

1.  In the top toolbar, click **Setup>Team/Partner setup**.

2.  In the left-hand navigation, click **New agent.**

3.  **Enter name and login information –** create the username and password for the agent and set their access privileges.

4.  **Assign product/add-on product licenses… –** if you have purchased additional applications, assign any appropriate licenses to your agent.

5.  **Assign MLS access… –** if you have the Top Connector 7i subscription, assign MLS access to your agent if appropriate.

6.  ✅ **OK**

7.  Repeat for each team member using an agent license.  You will need to tell each agent their Username and Password.  When they login for the first time, the TP 7i Setup Wizard will walk them through setting up their account.

> *"Our team is dependent upon our database to service our clients.  Any team member can quickly see what was said in past conversations using our database.  It's a team mindset of making them feel special."*
>
> GARY UBALDINI
> THE GARY AND NIKKI TEAM
> PALM HARBOR, FL

## Setting up Team Roles

*How to add a team name, photo, and logo*

If you purchased a Team/Partner subscription for TP 7i, you can upload your team name, photo, and logo to your team's account:

1.   From the top toolbar, click **Setup>Team/Partner setup.**

2.   Type the team name in the **Team** (or **Partnership**) **name** field.

3.   Click **Browse,** located directly under the **Team** (or **Partnership**) **photo** box.

4.   In the dialogue box, browse your computer for the appropriate file and click **Open**.

     **NOTE:**  *You may only upload .jpg format files.*

5.   Repeat the process in the **Team** (or **Partnership**) **logo** box to add team logos.

     **NOTE:**  *TOP PRODUCER 7i allows you to store multiple pictures for both agent/team member and company/team logo, simply by clicking **Add** for each picture file. These pictures can be viewed by clicking on **<<Previous** or **Next>>** directly under the preview screen.  The picture that is displayed in the preview pane will become the default picture automatically merged into marketing materials, letters, etc.*

6.   ❌ **Close**
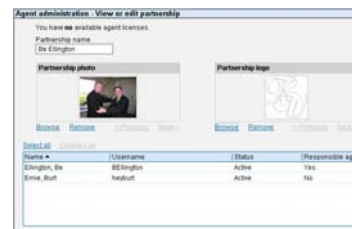
YOUR BUSINESS IS YOUR DATABASE

# *Chapter 3: Generating Leads*

## Objectives:

*[1]*   *Create and maintain contact records.*

*[2]*   *Edit the library of marketing materials.*

*[3]*   *Use action plans that are customized to your business.*

*[4]*   *Execute lead generation activities as they come due in the Today's business feature.*

# Creating and Maintaining Contacts

Your ability to effectively group your contacts and maintain the right kinds of information about them will determine how well you target audiences in your marketing and prospecting.

## Grouping Your Contacts

When Debby and Larry Lewis, of the Lewis Home Team, first joined Keller Williams, they wanted to get involved in their community through one of their Market Center's ALC committees. Needing a project to work on, they decided to show their support for the men and women of the U.S. armed forces fighting in Iraq —and they used their database to do it.

Debby and Larry came up with an idea for a project they called "Operation Shoebox," an effort to send care packages to our troops overseas. After creating customized letter templates in TOP PRODUCER asking for donations for these care packages, the Lewis's sent the letters out to their geographic farm, vendors, and other agents in their database. Reaction was almost immediate. From agents to past clients, it seemed as though everyone in the community wanted to show their support for our troops.

As donations began to come in, the Debby and Larry placed any contributors they hadn't met before in their database, and they labeled all contributors as a separate contact type. Those contacts were placed on a specific database action plan and are contacted on a regular basis for donations of care package items or postage to send them to our soldiers.

After 14 months, Operation Shoebox is still going strong and brightening the days of hundreds of our soldiers every quarter. Although the program was not intended as a business move, the Lewis Home Team has definitely noticed an increase in their business as a direct result of the project. But for Debby and Larry, the greatest reward comes in the form of the emails and visits from soldiers who have shown up at their Market Center to express their gratitude in person.

Contact management really works—just ask the troops who have received a care package from Operation Shoebox.

# Creating and Maintaining Contacts

*Grouping Your Contacts (continued)*

As part of building your database, you will classify each of your contacts into categories and groups.  You are generating leads from two general categories:

1.   People you have **Met**

     Marketing to your Met contact database is generally the most *cost-effective* form of lead generation.   For every twelve people in your Met contact database to whom you market yourself thirty-three times (33 Touch), you can reasonably expect to net two sales.  One of the sales will likely be *repeat* business; the other, *referral* business.

2.   A targeted group of people who you **Haven't Met**

     Due to the large numbers of contacts that will comprise your Haven't Met database, you may choose not to keep your Haven't Mets in TP 7i. You may instead choose to simply purchase a Haven't Met database from third-party vendors.  Not only does this keep your TP 7i database from becoming too cluttered, but it also means that someone else will be maintaining and updating those contacts for you.

*Tip! – Groups and contact types are both stored in the **Contact type** field of a contact record in TP 7i.*

These categories yield three types of business:

1.   New (from Haven't Met)

2.   Repeat (from Met)

3.   Referral (from Met)

## Dividing Your Database

Your Met and Haven't Met databases should be further divided into groups of relevance.  Generally speaking, you will divide your Haven't Met database into the public *en masse* and a targeted portion of the public.  Your Met database will be divided according to their relevance to your business.

Use the chart on the next page to guide you in sorting your database into groups.

# Creating and Maintaining Contacts

*Grouping Your Contacts (continued)*

| Category | Group | Definition | Lead Generation Strategies |
| --- | --- | --- | --- |
| **Haven't Met** | **General Public** | People you haven't met and who don't know you. | Implement Marketing and Prospecting activities from the two broad prospecting categories and the eleven broad marketing categories (refer to *MREA* pg. 138). |
| | **Target Group** | People you haven't met and who don't know you. It differs from the General Public in that you have targeted them as people with whom you'd specifically like to do business. | Implement a very specific marketing campaign to this group. Utilize the 12 Direct strategy. |
| **Met** | **Network Group** | Individuals who know you, because you have met them either in person or by phone. Might do business with you. | Launch a tighter; more directed marketing campaign in hopes of building a strong relationship and generating more business per person than from the Target Group. Utilize the 8 x 8 and 33 Touch strategies. |
| | **Allied Resources** | A very select subset of your Met Group who are in real estate-related fields. Individuals you expect either to do business with or to receive business leads from every year—usually, multiple times. Can and/or have done business with you. | Market to them in the same manner as your Network Group but with a targeted message. In addition, meet with them one-on-one for a meal, a visit, or a party several times a year. |
| | **Advocates** | People who not only have done business with you in the past and will continue to do so in the future, but will actively bring other people to you to do business, as well. | Market to them in the same manner as your Allied Resources but with a targeted message. Some (the most influential) you would see as often as once a month. |
| | **Core Advocates** | Not only can and will do business with you, but they are well placed—owner of a sports team, executive at a large corporation, a builder, etc.—and will send you a steady stream of clients. | Market to them in the same manner as your Advocates but with a targeted message. In addition, you should be providing some sort of service to them that improves their business as they are referring people to you to increase your business. |

## *Creating and Maintaining Contacts*

*Grouping Your Contacts (continued)*

### The Strategic Model for Generating Leads and Building Relationships

The diagram below represents the strategy for progressively moving contacts into the inner circles of your Met Group. The numbers represent the database of a "Net a Million" agent
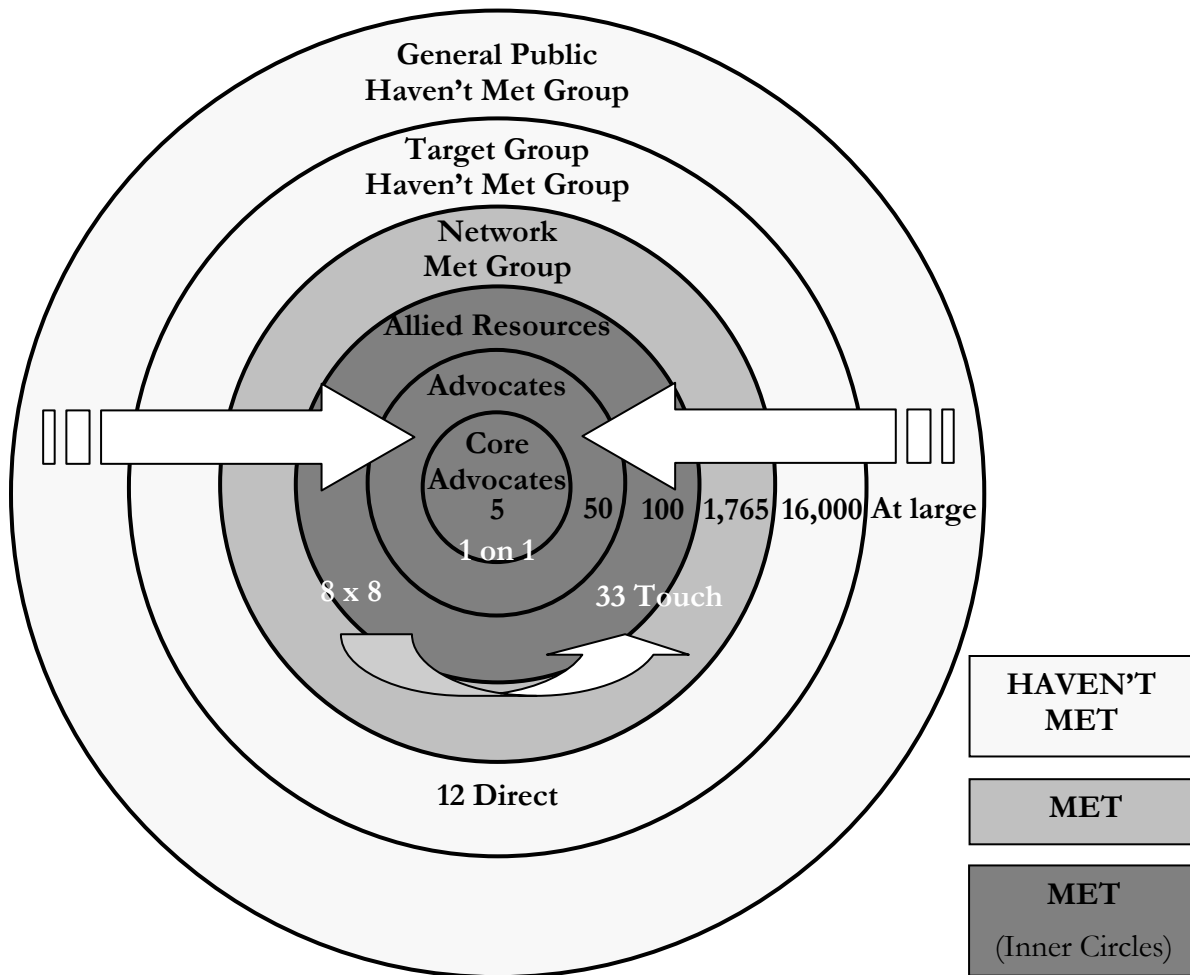


| Truth |
|---|
| **A millionaire real estate agent's overall strategy is to continually generate leads and move people into their inner circles.** |

# Creating and Maintaining Contacts

*Grouping Your Contacts (continued)*

Ask Mike Mendoza, of The Mike Mendoza Team, how contact management software has affected his business, and he'll tell you, "The greatest impact is in the amount of our referral business." And what an impact! Mike's team, The Mendoza Team, now averages over two referrals *per week* from referring agents.

How did he do it? By being diligent about entering referring agents' names into his database over the years, Mike has built a database of over 3,500 referring agents. In addition to the 40,000 copies of his Custom House Publishers newspaper that he sends out each month to other contacts, he creates a special front page with content aimed at getting referrals for the 3,500 contacts in his referring agent database. That kind of targeted marketing has allowed him to build a truly amazing business.

Contact management really works when you target your contacts—just ask Mike.

## Using Contact types

You should be as specific as possible in classifying each contact in your database. These fields allow you to perform quick searches of your database to find contacts of a particular nature to send out specific marketing messages. The following four Met contact groups mentioned on the previous pages should be entered as **Contact types** in your TP 7i database:

1. Network Group
2. Allied Resources
3. Advocates
4. Core Advocates

*"Organizing our database into contact types is a must. We can quickly identify any target group for a mass-mail out or email campaign."*

*DAN HARKER
THE HARKER FIVE-STAR TEAM
DALLAS, TX*

# Creating and Maintaining Contacts

*Grouping Your Contacts (continued)*

In addition, each of these groups can be further divided into contact types (e.g., Sphere of influence, Past client, etc.) that should also be entered as **Contact types** in TP 7i.  Specific contact types might include:

1.  Geographic Farm

2.  Name of team member (e.g., Buyer Specialist) working with contact*

3.  Co-op agent

4.  Referring agent

5.  Investor

6.  Adopted buyer (outside buyer who bought your listing)

7.  Sphere of influence

8.  Past client

*\* With a team, you need to have a contact type for each of your specialists' names.  When a lead is assigned to a Buyer or Listing Specialist on the team, the specialist needs to add the **Contact type** with their name to the contact's record.*

TP 7i refers to all of these distinctions of contacts as **Contact types**.  In addition to having several contact types to choose from, TP 7i allows you to create customized contact types.  In a contact's record, you should assign the contact as many **Contact types** as is appropriate.  This will help you to sort your database, giving you the ability to group thousands of records into defined target audiences for marketing and prospecting campaigns.

*Creating and Maintaining Contacts*

# Contact Records

How do you go from making $376.00 your first year in real estate to making $1.2 million in GCI per year and successfully running a Keller Williams region? Mary Harker, of The Harker 5-Star Team, did it by creating a huge database of satisfied clients. Ask her how she did *that*, and her answer might surprise you. "Building a database begins with one person," says Mary.

"Much of our business can be traced back to four or five individuals that we helped, who then referred somebody else, who then referred somebody else, and so on, branching out like a tree," Mary says. "It's just a matter of having the determination to meet that first person."

Mary's determination has put her face to face with executives from such companies as Motorola and Pizza Hut, not to mention Dallas Cowboys owner Jerry Jones. And those relationships have paid off in big ways. One client, for instance, led to a chain of 21 referrals for houses ranging from $285,000 to $1.25 million—and those referrals became repeat clients, as well.

Mary's first broker once told her, "If you have your customers' best interests at heart, the money will come to play in your backyard." Mary has built her business on this principle. By using her database to service her customers and continually ask for business, Mary's database has grown from referrals sent by satisfied customers.

Systematized contact management works to create a business that just keeps on referring—just ask Mary.

## New Contacts

Once you have your database set up in TP 7i, you will need to put several processes in place to maintain and utilize it. The first of these processes is to systematize the way in which you feed your database. Since you will need a large number of contacts to generate millionaire-level production, you will use your prospecting and marketing to feed new contacts into your database daily.

## Creating and Maintaining Contacts

***Contact Records (continued)***

Enter new contacts any time:

1. A prospective customer calls looking to buy or sell a home.

2. You meet anyone who is a potential client, Allied Resource, Advocate, etc.

3. You receive a referral from a contact.

If you aren't sure how many contacts you need in your database to hit your business goals, use the "Lead Generation Model" in the *MREA: Business Planning* course to determine your lead generation goal numbers. The "MREA Lead Generation Model" spreadsheet is available for download from the Free Materials section of KellerWilliamsUniversity.com. The spreadsheet allows you to input your closed sales goal and work backward to obtain the number of contacts you need in your database.

Your job is to fill your database with as many clients and people you know as possible. When entering contacts into your database, be sure to include all relevant information. In addition to the normal contact information, you will need the following information for your inner circles:

1. Birthday*

2. Spouse's/children's birthdays*

3. Children's names

4. Anniversary*

5. Job title

6. Company

*You should schedule all important dates (birthdays, anniversaries, etc.) and set reminders, so you remember to call these contacts on those dates.*

**NOTE:** *Enter any additional information in the* **Contact notes** *field of the contact record.*

> **"***Our database is a goldmine for us. We couldn't function without it.***"**
>
> *GARY UBALDINI*
> *THE GARY AND NIKKI TEAM*
> *PALM HARBOR, FL*

# Creating and Maintaining Contacts

*Contact Records (continued)*

Too often, agents speak with a prospect, hear "Not interested," and never contact the prospect again. However, Betsy Scheffe, of The Scheffe Group, knows that even if they're not interested in buying or selling a home at that time, chances are that they will be eventually. And chances are even better that they know someone else who will need an agent in the near future.

"One of my very first open houses was a very expensive bank foreclosure," Betsy recalls. "Unfortunately, the market wasn't strong at that time, so my only visitors were a mother and daughter who told me that they were 'only nosy neighbors.' Still, we had a lovely conversation, and it turned out that the daughter and I had both attended small Presbyterian colleges.

"After the open house, I entered them into my database, wrote them a 'Nice to Meet You' letter, and began my follow-up. Six months later their bank called and asked if I would be willing to handle the sale of a piece of property in their Family Trust. The sale of that property was the beginning of years of referrals and personal business with this family, including the lease and later sale of a very expensive home, the sale of the grandmother's home, the sale to and for the son, and the sale of a home to and for the son and his wife. Despite the fact that they weren't interested at the time, that conversation was the first of many in a wonderful client relationship, which has allowed us to keep in touch professionally as well as personally—all thanks to contact management and a terrific team!"

Contact management really works, but only when you add contacts—just ask Betsy.

## *How to create an individual contact record*

The following information is a must have for all of your contacts:

1.   In the top toolbar, click **Contacts**>**Leads**. In the left-hand navigation, click **Add new lead**.

     **NOTE:** *It is better to use **Leads** to add new contacts rather than **Add new contact**. **Leads** forces you to choose the source for the lead. Only leads that have sources entered will appear in the **Lead manager**.*

*(continued on the next page)*

# Creating and Maintaining Contacts

*Contact Records (continued)*

2. **Source –** it is important to enter the source for each contact. This will allow you to track where your business is coming from, so you can invest your lead generation dollars wisely. If the source of a contact is **Referral**, TP 7i will notify you that the contact will also be listed in the **Referral manager** (see pg. 104). Click **OK**.

    **NOTE:** *To create additional sources, click the pick-box beside the* **Source** *field and select* **Modify list**. *Enter the new source and click* **OK**.

3. **Name details –** in addition to the visible fields, clicking on the words **Name details** will give you more fields to enter detailed information about the contact, such as their nickname and information about their family and friends. This also allows you to enter and set a reminder for the contact's birthday.

4. **Contact information –** in addition to the visible fields, clicking on the words **Contact information** will give you more fields to enter multiple phone numbers (parentheses and a hyphen are not necessary; TP 7i will automatically insert these for you), emails, and website addresses relevant to the contact.

    a. **Show in list –** this allows you to select which phone number or email address you want to display for the contact as the primary method of contact.

    b. **Contact types –** by clicking on the pick box to the right of this field, you can select from preexisting contact types. You can and should select multiple contact types, as you will use these to sort your database for marketing and prospecting activities. Hold down the **Ctrl** key to select multiple contacts. Click **OK**.

        **NOTE:** *To create additional* **Contact types**, *click the pick-box beside the field and select* **Modify list**. *Enter the new contact type and click* **OK**.

    c. **Inquiry form –** do not enter anything in this field. TP 7i will automatically fill in this field if the contact account was created using an automated lead capture form (see pg. 92).

    d. **Urgency –** this field allows you to set the level of urgency of this contact in terms of completing a transaction with you.

5. **Address details –** in addition to the visible fields, clicking on the words **Address details** will give you more fields to enter PO Box, floor number, and county of residence.

*"Everyone you know needs to be put into your database."*

*RICHARD BASS*
*THE BASS GROUP*
*BOCA RATON, FL*

# Creating and Maintaining Contacts

*Contact Records (continued)*

6. **Contact notes –** by clicking **Add new** in the contact notes field, you can keep track of what was said during meetings and phone conversations with your contacts. Clicking **Pick from list** allows you to choose from prefabricated topics. You will notice that the date, time, and name of the team member making the note will automatically appear in the record.

7. ✅ **OK** . The contact record has now been created and is viewable in your Address book (**Contacts>Address book** in the top toolbar).

*How to add detailed information to a contact record*

As you develop your relationship with your contacts, you will want to enter more detailed information for your inner circle contacts in the **Address book**:

1. In the top toolbar, click on **Contacts>Address book**.

2. In the **Address book**, scroll to find the appropriate contact and double click on the contact's name.

3. In the **Contact details for…** screen, click on the tab to which you wish to add information.

4. **Contact** tab **–** by clicking on the contact's name, you can add more detailed information in the appropriate fields for the contact and the **Secondary person** (you must enter the **Secondary person**'s last name for them to appear in the Address book). In the **Family and friends** field, click **Add new** at the bottom right of the screen to add children's, relatives', and friends' birthdays. ✅ **OK**

   a. **Properties –** if a contact has more than one property, click on the word **Properties**:

      i. Select **Add property** from the left-hand navigation.

      ii. In the **Add new property** screen, enter the address of the property and select the Property type from the drop-down menu. 🔵 **Next**

      iii. In the next screen, enter any detailed information on the property. 🔵 **Next**

      iv. In the **Pictures for…** screen, you can add property photos (see step 7 for help). ✅ **Finish** .

      v. ❌ **Close**

   b. **Action plan –** for more information on applying action plans, see pg. 56.

⬇

# Creating and Maintaining Contacts

*Contact Records (continued)*

5. **Address details** tab **–** enter any address information.  The merge codes for many of the marketing materials in the Communication library will pull mailing information from these fields.

6. **Property statistics** tab – enter detailed information and descriptions about the contact's property in the appropriate fields.

7. **Pictures** tab **–** by attaching pictures to a contact's record, you can use TP 7i's merge code capabilities to automatically add pictures to your marketing pieces (e.g., adding property photos to property flyer templates).

   Select the appropriate category from the **Picture** drop-down menu. Click **Add** and browse your computer to find the photo file.  From the **Merge code** drop-down menu, select a merge code for the photo. Merge codes will automatically populate your marketing material with photos and information from the contact record.  Repeat the process for any additional photos you may wish to upload.

   **NOTE:** *Use the same merge code for similar photos in other contact records.  For instance, anytime you upload a photo of a property's living room, use the picture_living_room merge code. This will ensure consistency in what photos appear on marketing materials, like your property flyers.*

8. **Present/future home** tab **–** fill in any missing information on a seller's property under **Present home**.  Fill in any buyer's search criteria under **Future home**.

   **NOTE:** *By entering the* **Present/future home** *information, you can cross-check your TP 7i database for matching sellers and buyers using* **Search>Search for contacts** *in the top toolbar.*

9. ⊗ **Close**

> *"Real estate is a business of personal relationships.  The more we know about our clients, the better we can provide them with unparalleled customer service."*
>
> MIKE MENDOZA
> THE MIKE MENDOZA TEAM
> PHOENIX, AZ

*(continued on the next page)*

# *Creating and Maintaining Contacts*

*Contact Records (continued)*

## Maintaining Your Contact Records

In addition to the daily tasks that you will perform using TP 7i, there are a number of regular maintenance issues that you will need to perform in order to keep your database running smoothly.

1. **Updated Contact Information –**

   Every time a contact completes a transaction, moves, divorces etc., their contact information should be updated in TP 7i.  You should also take the opportunity in your calls to verify that their contact information is correct and complete.

2. **Correct Database Group –**

   Check the contact notes in TP 7i to determine what a contact's relevance is to your business.  Based on whether they give a referral, complete a transaction with you, are a FSBO, etc., make sure that they are in the appropriate database group (in the **Contact types** field of the contact record).  If a contact has given any referrals, make sure that they are in the Allied Resource, Advocate, or Core Advocate groups, depending upon how many referrals they've given.

3. **Correct Action Plan –**

   Check the notes to determine what a contact's relevance is to your business.  Based on whether they give a referral, complete a transaction with you, are a FSBO, etc., make sure that they are on the appropriate plan (e.g., past clients should be one the 33 Touch: Client for Life).  If they just finished an 8 x 8, make sure that they are placed on the correct 33 Touch.

4. **Current Notes –**

   Because your goal is to amass a large database of contacts, keeping track of personal details is impossible if their notes are not kept current.  The database should have notes for every time you or your team contact them.

*Tip!* – *For updated mailing addresses, return service from the post office will notify you of any forwarding addresses available.*

# Creating and Maintaining Contacts

*Contact Records (continued)*

## Mass Updates

The **Mass update** feature of TP 7i is a quick way to update a large number of contact records at once. Common uses of Mass update include changes to the company name, area code, mailing salutation, contact notes, and contact type fields. Mass update also gives you the ability to apply any action plan to a large number of contact records simultaneously without having to scroll from record to record individually.

### *How to perform a Mass update*

1. In the top toolbar, select **Contacts**>**Mass update**.

2. Select the appropriate category from the **Search category** drop-down menu at the top left of the screen.

3. In the **Search criteria** field, select the appropriate criteria.

4. In the **Search for** field, select the appropriate search item(s).

5. Click ➡ next to the **Perform search based on:** field.

6. Repeat until you have entered all of the contact search conditions you wish.

7. 🔵 **Start search**

8. In the **Mass update** screen, select the appropriate contacts in the list. Hold down the **Ctrl** key to select multiple contacts or click **Select all** (if you select all, you can hold the **Ctrl** key and click on names to deselect them from the list).

9. 🔵 **Next**

10. Select the appropriate tab(s), and enter the relevant update in the appropriate field(s).

11. 🔵 **Start**

12. In the **Mass update confirmation** prompt, click **Yes** to update all of the selected contacts with the new information.

13. In the **Mass update** prompt, click **OK**.

*(continued on the next page)*

*Creating and Maintaining Contacts*

*Contact Records (continued)*

## Cleaning Your Database

In addition to regular updating, it will be necessary to do a recurring clean-up of your database.  This is best done before a major mailing event (such as a calendar mail-out) to help cut down on unnecessary expenses.  When cleaning up your database, look for contact records that have:

1.  Sparse notes that indicate a lack of response to the team's marketing.

2.  Notes that the contact has asked not to be emailed or phoned

3.  Notes that the contact has asked to be taken off of the mailing list

4.  Limited contact information (e.g., name and phone number, but no address nor email)

**NOTE:** *You should develop a system to ensure that your database remains up-to-date.  Consider going through one letter of the alphabet every two weeks to avoid having to clean up your entire database at once.*

When you find incomplete contact records, be sure to follow up with the contacts to get the necessary information.

## Opting Out

When contacts ask to be removed from your database, take such requests seriously.  Not only is it a waste of your time, money, and effort to continue to contact those who do not wish to be contacted, but because of the new anti-SPAM and Do Not Call legislation, it is illegal to do so in many instances. Penalties can range from being kicked off of the Internet by your ISP (Internet Service Provider) to fines in excess of $11,000.

At anytime during a plan, if a contact asks to be removed from your database:

1.  Record their requests in the **Contact notes** field.

2.  Either stop their plan immediately or delete those activities that involve the method of communication the consumer complained about (e.g., delete scheduled calls if they only asked you to stop calling).

3.  Any team member who receives such feedback from a contact should immediately notify you.

**NOTE:** *While it might seem intuitive that such contacts should be deleted from the database, this is not always the best course of action.  By keeping contacts who do not wish to be contacted labeled as such in your database, you can prevent accidentally adding the same individual after deletion and contacting them again, against their wishes.*

# *Editing the Marketing Library*

When it comes to marketing to your database, the key is tailoring your marketing material to your target audiences.  This means not only customizing the types of marketing material you send them, but customizing the marketing message of any given marketing piece for the intended audience, as well.

Marketing to 4,000 contacts like Rick and Teri Brenkus, of The Brenkus Team, doesn't mean that your message can't have a personal touch.  And Rick will never forget the day he learned how powerful using your database to personalize your marketing can be.

After completing a walk-though during a listing presentation, Rick sat down with the sellers at the kitchen table.  As he finished his presentation, Rick asked, "Will you be talking to any other agents before making a decision?"

The sellers looked surprised.  "Rick, you must have missed the pictures in the living room," one of the sellers said.  They took Rick into the living room and pointed out what he had overlooked earlier.  Among the display of Christmas cards were four cards with pictures of the Brenkus family from the past four years that Rick and Teri had sent to their database.  They told Rick that they wouldn't list with anyone else because of the great service and the personal touch they had received over the years.  The sellers didn't know or care how many people Rick and Teri sent cards to.  The fact that they had received a personalized card from them during the holidays was all that mattered.

Contact management helps give your mass marketing that personal touch—just ask Rick and Teri.

The **Communication library** of TP 7i is a powerful marketing tool, containing nearly 1,000 editable marketing and communication letters, email messages, postcards, property flyers, and presentation templates.  In addition, you can add an unlimited number of your own personalized marketing materials to the library. Each marketing template in the library uses merge codes to automatically import contacts' names, addresses, salutations, and other personalized information directly from their contact record into the template.

*(continued on the next page)*

## *Editing the Marketing Library*

When using the Communication library, remember:

1. Each marketing type (e.g., **Letters**, **Postcards**, **Flyers**, etc) is separated into individual areas under the appropriate tabs within the Communication library.

2. Each marketing type (e.g., **Letters**, **Postcards**, **Flyers**, etc) has multiple **Categories** that house individual marketing **Templates**.  For clarity, think of categories as traditional computer folders, while templates are similar to traditional computer files within those folders.

3. Categories that come standard with TP 7i are identified as either a default category or a personal category.  You *cannot* delete, remove, or rename a default category or any templates within default categories. However, you *can* delete, remove, or modify personal categories and any templates within them.

You can create unlimited personal categories and create unlimited templates within these categories.  New templates can be created from scratch or created from a copy of any other template within TP 7i, including default templates.

> **"***Top Producer is a key contributor to my successful real estate business.***"**
>
> *JAN RICHEY*
> *THE JAN RICHEY TEAM*
> *FRISCO, TX*

## Using Merge Codes in Templates

Each picture and contact information field in a contact's record has a merge code attached to it.  The templates in TP 7i use these merge codes to automatically populate common information from contact records into your marketing material.  When you are creating several marketing pieces (e.g., letters, etc.) at one time, this allows TP 7i to automatically customize each piece to the individual contact.

When you create or customize a letter, postcard, or other template in the Communication library, you can insert the appropriate merge code into the template.  For any given merge code in a template (ex: `Contact name` ), TP 7i will automatically insert that information (in this case, the contact's name) from the contact's record in place of the merge code in the marketing template.

# *Editing the Marketing Library*

## *How to create a template category*

Under each tab (e.g., **Letters**, **Email messages**, etc.) in the Communication library, there are several template categories to choose from in the **List of categories** drop-down menu.  In each category, there are templates specific to that category.  If you wish to edit or create a new template, you will have to create a new category in which to store it:

*1.*    In the top toolbar, click **Mail**>**Communication library**.

*2.*    Select the tab you want (e.g., **Letters**, **Email messages**, etc.).

*3.*    Above the **List of Categories** drop-down menu, click **Add**.

*4.*    In the prompt, enter the **New category name**.   ✓ **OK**
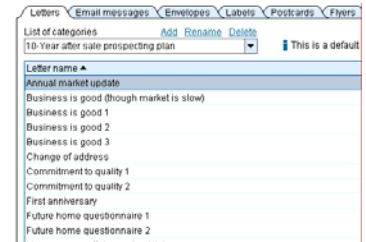
## *How to edit an existing template*

Before you edit a template, make sure that you have first created a category in which to store it.  To change the wording or merge codes in a particular template:

*1.*    In the top toolbar, click **Mail**>**Communication library**.

*2.*    Choose the tab you want (e.g., **Letters**, **Email messages**, etc.).

*3.*    From the **List of Categories** drop-down menu, choose the desired category.

*4.*    In the list of templates for that category, double-click the name of the template you wish to edit.

*5.*    The editing functions of the word processor are similar to MS Word, and the editing functions of the email editor are similar to MS Outlook.

     To determine the function of any button in the toolbar, simply hover your mouse pointer over the button.  A box will appear with a description of the button.

     To copy and paste text from documents in other programs into a TP 7i template, highlight the text you want to copy, hold the **Ctrl** button, and press **C**.  To paste it into a TP 7i template place the cursor where you want to insert the text, hold the **Ctrl** key, and press **V**.

*6.*    **Insert picture merge code –** click on this link below the text field to insert a picture based on the contact's record.  Select **category** and **merge code** for the template.  Click **OK**.

*7.*    **Insert merge code –** click on this link below the text field to insert contact information based on the contact's record.  **Select category** and **Select merge code** for the template.  Click **OK**.

*(continued on the next page)*

# *Editing the Marketing Library*

8.  **Insert link –** click on this link below the text field to insert one of your marketing links to send your contacts to a webpage (in emails only).

9.  ✅ **OK**

10. If you are making changes to a TOP PRODUCER-created template, the **Save template** prompt will appear.  You will need to save the new template in the **Personal templates** category or a category that you have previously created.  Click **OK**.

---

### *How to create a new template*



To create a new template for your business:

1.  In the top toolbar, click **Mail**>**Communication library**.

2.  Choose the tab you want (**Letters**, **Email messages**, etc.).

3.  You can create a new template based on an existing template by selecting the existing template and clicking **Copy** in the left-hand navigation.  A prompt will appear asking you to rename the template and to choose a category in which to copy it.
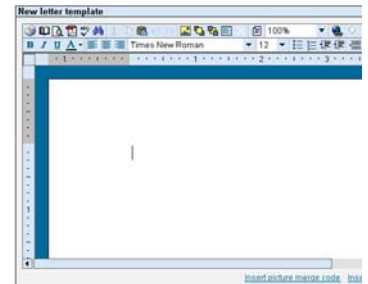
    **NOTE:** *In both the **Letters** and **Email** messages **List of categories** drop-down menus, there are categories respectively called **Blank letter** and **Blank email**.  Within these categories there are blank templates by the same name that contain standard merge codes for contact information, salutation, etc.*

    *Copy and modify these templates when creating new templates for letters and emails to prevent having to enter the merge codes manually.  From the **List of categories** drop-down menu, select the category in which you stored the copied template and double click on the template to edit it.*

4.  You can create a brand new template by clicking **Create new** in the left-hand navigation.

    a.  If you are creating **Envelopes**, **Postcards**, and **Labels**, you will need to select the size of the printed document. Click **OK**.

    b.  If you are creating **Flyers** you will need to select the number of properties to be featured on the flyer.  Click **OK**.

5.  To copy and paste text from documents in other programs into a TP 7i template, highlight the text you want to copy, hold the **Ctrl** button, and press **C**.  To paste it into a TP 7i template place the cursor where you want to insert the text, hold the **Ctrl** key, and press **V**.

# *Editing the Marketing Library*

6. **Insert picture merge code –** click on this link below the text field to insert a picture based on the contact's record.  Select **category** and **merge code** for the template.  Click **OK**.

7. **Insert merge code –** click on this link below the text field to insert contact information based on the contact's record.  **Select category** and **Select merge code** for the template.  Click **OK**.

8. **Insert link –** click on this link below the text field to insert one of your marketing links to send your contacts to a webpage (in emails only).

9. 🔘**Save** or ✅**OK**  to save the template.

## Marketing Links

Marketing links allow you to quickly insert hyperlinked text into your eMarketing material that will take your contacts to web pages of your choosing. And because flyers, presentations, etc., may be very large in file size, you can publish them to the Internet and create a Marketing link for the documents.

### *How to create Marketing links*

To create your marketing links:

1. In the top toolbar, click **Mail>Communication library**.

2. Choose the **Marketing links** tab.

3. Create a category for your links (see pg. 47).

4. In the left-hand navigation, select **Create new** to create a new template.

5. **Enter the URL or web site address for… –** type or paste the URL to the webpage to which you want to link.

6. **Enter new marketing text for this link –** enter the text that will appear as the hyperlink in the message.

7. **Enter a description for this link –** enter a description that will serve as a reminder to you and your team as to what the link is for.

8. ✅**OK**
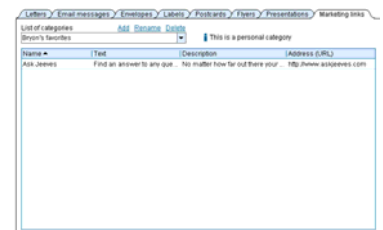
# *Using Action Plans*

Implementing database action plans to maintain a consistent lead generation program is crucial to massive lead generation. But these action plans only work if you take the time to customize them to your target audiences and the way you do business. This is especially true of your lead generation plans, such as the 12 Direct, 8 x 8, and 33 Touch.

## Overkill over Time

The key to contact management is consistency. And for Debbie Fontenette, the ability to easily touch her contacts on a consistent basis was something that had eluded her with other contact management software. "After buying many costly contact management programs, I decided to try TOP PRODUCER," says Debbie.

One of the first differences she noticed was the level of support. "With the help of the TOP PRODUCER technical support, I imported all of my past clients and sphere into the program." Once her contacts were in her database, Debbie began implementing the program's action plans to do mass mailings.

That's when she began to notice other differences in using the software. "I was able to track things that I had been missing with the other programs, and I started sending marketing pieces out on a more consistent timeline." Being able to track her business really drove home the importance of consistency for Debbie. "I noticed that each time that I would do a mass mailing, it would bring in at least one buyer or seller that closed with me. Those results encouraged me to continue to work my clients and sphere more regularly."

Now that she uses her database action plans to work her database methodically, Debbie understands just how powerful a tool contact management can be. "My business has more than doubled by using it," she says. "TOP PRODUCER has definitely paid for itself!"

Contact management action plans work to make you and your business consistent—just ask Debbie.

# *Using Action Plans*

*Overkill over Time (continued)*

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## Truth

**Real estate sales is a *contact* sport.**

**Real estate sales is a *close contact* sport.**

**Real estate sales is a *frequent* and *systematic close contact* sport.**

---

Action plans are the leverage tool within TP 7i. Action plans organize a series of activities (e.g., calls, letters, emails, etc.) over a given time period that can be attached to an individual contact record or any contact type. Each time an activity on a plan comes due, TP 7i reminds you or your assigned team member in the Today's Business feature of TP 7i.

If the activity has a letter, postcard or other template attached to it item from the communication library, the template is automatically personalized for the recipient. The item can then be edited and printed or emailed from the Today's business.

TP 7i comes pre-loaded with a number of action plans targeted toward various audiences. In addition, Keller Williams Realty has added three types of action plans for marketing and prospecting to your Met and Haven't Met databases:

1. 12 Direct (Haven't Met)
2. 8 x 8 (Met)
3. 33 Touch (Met)

**NOTE:** *Similar to the Communication library (see pg. 45), some action plans cannot be deleted and must be copied to a personal category before changes can be made.*

---

## Truth

**All three have a common theme: *Overkill over Time.***

Why? Because no matter how much frequent and systematic lead generation is emphasized, most real estate agents still tend to *underdo* it.

---

*"Within a few seconds we can launch an action plan that reminds team members of their duties for any prospect or client. Action plans keep you organized, on purpose, and accountable."*

MIMI PATRICK
THE GARY AND NIKKI TEAM
PALM HARBOR, FL

# Using Action Plans

*Overkill over Time (continued)*

## The Lead Generation Database Flow Model

| Met | Haven't Met |
|-----|-------------|
| Contact Made | Geographic and Demographic List Created |
| "8 x 8" to Build Relationship | |

Contact Management Database

"33 Touch"  |  "12 Direct Mail"

Repeat Business

Referral Business  |  New Business
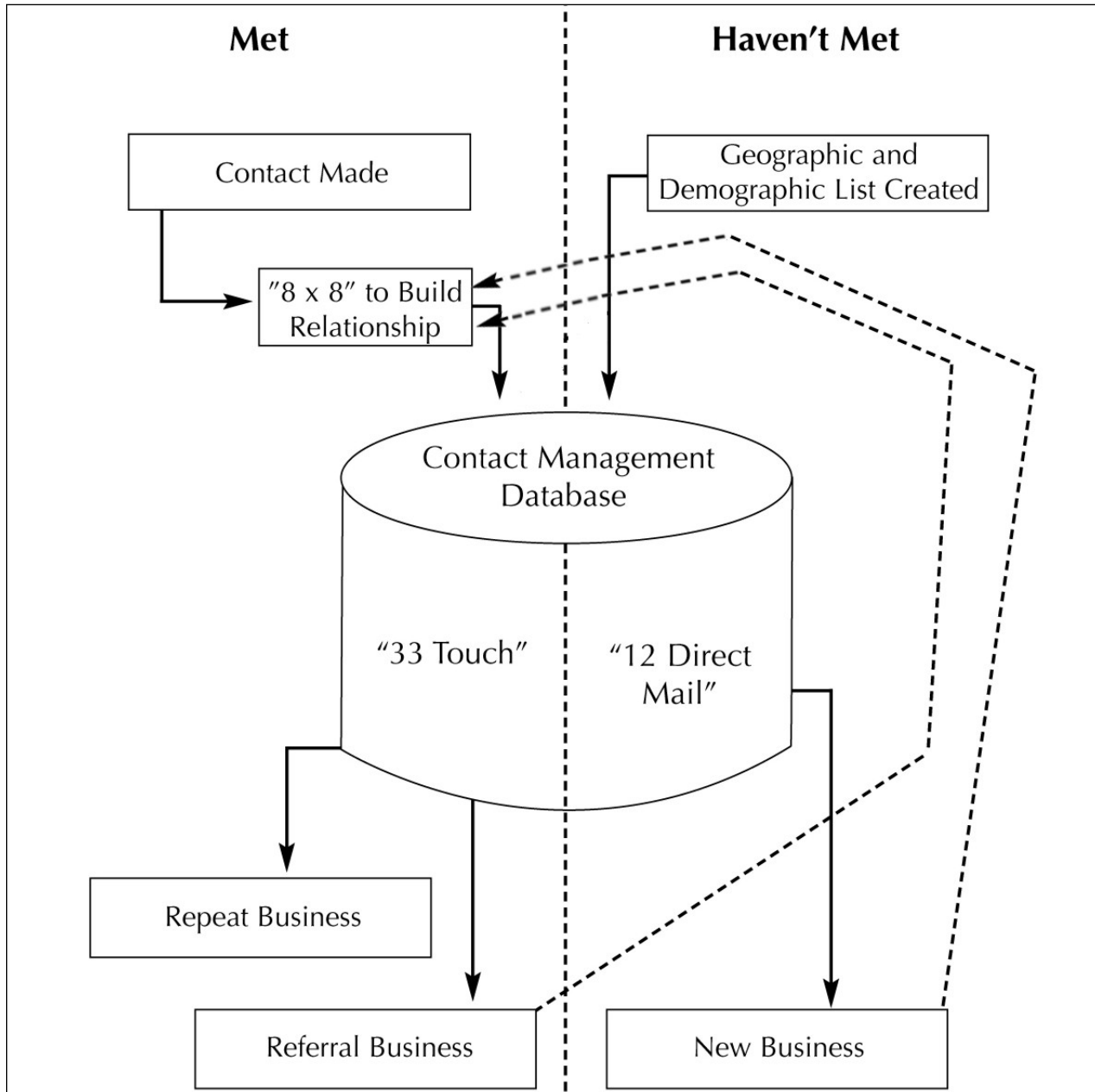
From *The Millionaire Real Estate Agent*

*Using Action Plans*

# Customizing Action Plans

Martin Bouma, of The Bouma Group, knows that having tailored action plans for different types of contacts allows you to target different audiences with specific marketing messages. "We have action plans for every type of contact that we work with: FSBO's, Expireds, prospective sellers…," says Martin. And even with over 50 different contact types in his database, his customized action plans keep him on top of them all.

But Martin didn't stop there with his action plans. "We also created action plans for everything from following up with a lead to managing a listing to closing a transaction." By creating all of these transaction plans, The Bouma Group now has a system that ensures that everyone on their team knows what to do and when to do it. "We live off of our action plans," says Martin.

And the benefit of having a business that is this systematized? "You don't have to think," explains Martin. "Every morning, our database tells us exactly what needs to be done. That's the beauty of a great database."

A contact management action plan that's customized to the way you do business is a beautiful thing—just ask Martin.

The Keller Williams Realty version of TP 7i comes with several action plans, including the 12 Direct (pg. 58), 8 x 8 (pg. 60), and 33 Touch (pg. 64) lead generation plans. Keller Williams Realty has even included marketing material for use in your lead generation plans. There are also action plans for referrals, servicing listings, and transaction management.

The goal of these plans is to keep you in consistent contact with your database. However, they are only effective if you actually use them. To that end, you should customize these plans to suit how you do business.
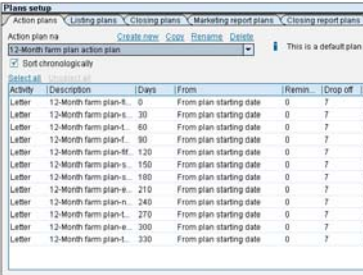
# *Using Action Plans*

*Customizing Action Plans (continued)*

## *How to customize your action plans*

The Keller Williams Realty version of TP 7i includes versions of 12 Direct, 8 x 8, and 33 Touch plans.  If you choose, you may customize these plans to suit your business needs:

1.  In the top toolbar, click on **Setup**>**Plans setup**.

2.  Choose the plan you wish to customize from the **Action plan name** drop-down menu.

3.  Select **Copy** above the drop-down.  In the **Copy action plan…** prompt, enter the **New action plan name**.  Click **OK**.

4.  To change an existing activity on the plan, double-click on the activity.

    Or to create a new activity for the plan, click **Create new activity** in the left-hand navigation.  Select the **Activity Type** for the activity.  ⊙**Next**

5.  Enter a **Description** for the activity or choose one from the pick-box.

6.  Set the **Priority** for the activity.  This will affect the order in which it will appear in the due items for the activity type in Today's business.  Activities with a greater priority (i.e., 1) will appear first in the list of similar activities due that day.

7.  Use the **Assign to** drop-down menu to assign an activity to a team member that has a TP 7i license to your database.

8.  If applicable, click **Select…template** to attach an email, letter, envelope, label, or postcard template to the activity.  Choose a template category from the **List of categories** drop-down menu, and double-click the template you wish to use.

    If you wish to preview or edit an attached template, click **Select…template,** select the correct template, and click **View or edit** in the left-hand navigation (for more information on editing templates, see pg. 47).

9.  If the activity is an email, click **Attachments** to attach any documents to the email.  By checking the **Send this email automatically**, TP 7i will automatically send the email and any attachments you have added when the activity comes due on the plan.

10. **Activity dates –** this controls when the activity will come due relative to the launch date of the plan, whether or not TP 7i sends you a reminder before the activity is due (to allow time for mailing items, etc.), and how long an uncompleted activity will remain on your Today's Business.

*(continued on the next page)*

# *Using Action Plans*

*Customizing Action Plans (continued)*

11. **…to be performed… –** select whether you wish the activity due date to come due relative to the plan launch date or when the preceding activity on the plan is completed.

12. **Move event to –** choose whether you would like activities that fall on Saturdays and Sundays to be rescheduled on the previous or following business day.

13. ✅ OK or ✅ Finish to save the activity (depending on whether you are editing or creating a new activity).

14. Repeat as necessary to modify the plan.

*"We live in our database. We wouldn't be where we are today without it."*

*DEBBIE ZOIS*
*DEBBIE ZOIS & ASSOCIATES*
*LAS VEGAS, NV*

## Creating New Action Plans

In addition to customizing pre-existing action plans, you can create all new action plans of your own. There are two ways to create an action plan:

1. From scratch

2. By copying and modifying an existing action plan (such as creating a 33 Touch: Client for life plan by copying and modifying the standard 33 Touch)

### *How to create a new action plan*

1. In the top toolbar, click **Setup**>**Plans setup**.

2. Above the **Action plan name** drop-down menu, click **Create new**.

   **NOTE:** *If you wish to copy and modify an existing plan, highlight the name of the plan you wish to copy in the drop-down menu and then click **Copy**. Create a new name and click **OK** (for more information on modifying a plan see pg. 54).*

3. In the **Create new action plan** prompt, enter the new **Action plan name**. Click **OK**.

4. In the left-hand navigation, click **Create new activity** (see pg. 54 for more information on how to customize your new plan).

5. Repeat the process to add additional activities to the plan.

6. ❌ Close
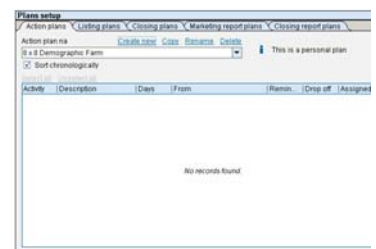
# *Using Action Plans*

*Customizing Action Plans (continued)*

## *How to apply action plans*

*1.* In the top toolbar, click **Contacts**>**Address book**.

*2.* Find the contact's name by clicking on the first letter of their last name beside the address book and/or using the arrows to scroll.

*3.* Double-click on the contact's name.

*4.* In the contact's record, click on **Action plan**.

*5.* In the **Action plan** screen, click **Select plan** in the left-hand navigation.

*6.* In the **Apply action plan** prompt, scroll through the **Available plans** and select the appropriate plan.

*7.* Click **Add**. In the **Select plan start date** prompt, select the correct start date. Click **OK**.

*8.* Click **OK**.

*9.* ⊗ Close

## Scheduling Dated Activities

You will launch different contacts on 33 Touch plans (see pg. 65) at various times throughout the year. However, some activities on the 33 Touch are fixed dates on the calendar, such as birthdays and holidays. While birthdays are automatically calendared when you enter them into the contact record, holiday mailers and other such activities will have to be scheduled independently from plan activities. Because of this, you will notice that the 33 Touch plan in TP 7i is actually comprised of fewer than 33 activities.

## *How to schedule dated activities*

To set up dated activities:

*1.* In the top toolbar, click **Schedule**>**Schedule activity**.

*2.* Select the **Activity type**. ⟳ Next

*3.* **Activity details** – Choose the **Description** of activity from the pick-box or type in your own description. Set the appropriate **Date** and **Time** (if applicable for the activity to come due in TP 7i.

> **NOTE**: *Changing the* **Time** *for a* **Call** *will make it appear as an appointment in Today's business.*

# *Using Action Plans*

*Customizing Action Plans (continued)*

Choose the responsible team member from the **Assigned to** drop-down menu.  And by clicking on **Contacts**, you can select the contact(s) to whom you would like to apply the activity.  You can even attach contacts of a particular **Contact type**.

If you are sending an email, a letter, or a postcard, you can attach pre-filled templates to use for the touch.

4.  **Link to** – if the activity is part of a **Listing** or a **Closing**, you can search your database to attach the property record to the activity.  The activity, when marked done, will then show up on service reports.

5.  **Occurrence** – select whether the activity is a **One time** event or a regularly **Repeating** activity.  If you set the activity to repeat, click on **Setup repeating activity** to set the frequency and the beginning and ending occurrences for the activity.

6.  **Reminder and Drop off** – you can set an advance **Reminder** in order to remember to send letters and postcards in time to get to your contacts on the appropriate day. By checking the **Apply drop off…** box, TP 7i also allows you to set the number of days that you would like to elapse before unperformed activities **Drop off** your Today's business list.

7.  ✅ **Finish**

*Using Action Plans*

# 12 Direct

12 Direct is a systematized method of working the Haven't Met portion of your database, which includes your mailing lists for farm areas and/or any other demographic groups.  It stands for twelve direct mail marketing pieces mailed out annually (one per month—every month).  The goal of 12 Direct is to generate customers from your Haven't Met database and move them into your Met Database.

Considering the time involved and the work that can be delegated, there is no question that this is a highly leveraged form of lead generation to the masses. In the same amount of time you would work a handful of names in your Met contact database, you can shape a marketing message that can be sent to thousands in your Haven't Met database.

Ho big can you go with a 12 Direct?  In the case of Jim Striegel in Dallas, Texas, big…REALLY BIG.  In addition to the 4000 pieces of marketing materials that he sends out to his Met database each month, Jim sends out monthly marketing pieces to the 200,000 people that make up his Haven't Met database.



After a successful career in the automotive industry, Jim started in real estate with a significant amount of capital and sales experience.  He knew that, if he was going to be successful in real estate, he was going to have to think big.  So he started out with a Haven't Met database of 5,000 when he first got into real estate in 2000.

Five years later, Jim has expanded his Haven't Mets to 200,000.  How?  By developing marketing messages that he was sure would attract clients and then setting aside 25% of his GCI for his marketing program.

It's true that not everyone can or should invest that much capital in a marketing program.  But for Jim, the results are impressive.  His first year in the business he earned a GCI of $365,000!  And just five years later, he earned over $4 million in GCI!  That's the power of thinking big.

Everything's bigger in Texas, including Haven't Met databases—just ask Jim.

# *Using Action Plans*

*12 Direct (continued)*

## *How to customize your 12 Direct*

In addition to the previously mentioned steps for customizing your action plans (see pg. 54), when customizing your 12 Direct:

1. Typically you will send 12 Direct through a direct mail firm or printer. However, you may choose to outsource any part of the design and production to a qualified vendor, as well (for a list of pre-approved vendors, go to the Marketing tab of the KW Intranet).

2. The 12 Direct will be a series of reminders to send marketing material to your printer or direct mail service. Determine if you are going to plan your annual 12 Direct program all at once (highly time-leveraged) or if you will develop your direct mail pieces on a monthly basis.

   a. To save time and money, plan and set up each twelve-month campaign all at once at the beginning of the year, so it can go on automatic pilot for the year. Then your 12 Direct action plan will serve merely as a reminder to make sure that those in charge of sending it out are following through.

   **Or**

   b. If you are going to develop pieces monthly, set up reminders to give yourself extra time to create the pieces (or ensure their creation through a vendor) before the mailing date comes due. You can do this by creating reminders as additional To-dos in the action plan. Or you can modify the current activities in the plan to send reminders to you (see pg. 54) before the actual due date.

3. If you do not have a Haven't Met database, make sure that you set up a reminder to obtain a mailing list for your Target Group, which includes your geographic farm, from a third-party vendor.

## *Using Action Plans*

# 8 x 8

The 8 x 8 is a high-impact, high-saturation technique that is designed to put you in the Number One position in the minds of everyone in your contact database within an eight-week period.  Use the 8 x 8 to jump-start your 33 Touch and establish a relationship that can be sustained and grown.

Below is a sample 8 x 8.

| | | |
|---|---|---|
| **Week 1** | Drop off a letter of introduction, your personal brochure, a market report, and your business card. | |
| **Week 2** | Send a postcard, inspirational card, community calendar, <u>or</u> market statistics. | |
| **Week 3** | Send a postcard, inspirational card, community calendar, <u>or</u> market statistics. | |
| **Week 4** | Make a telephone call:<br><br>"Hello, this is _____ with Keller Williams Realty.  Did I catch you at a bad time?  How are you?  Did I happen to receive the _____?  Have you had a chance to look at it?  The reason I'm calling is to find out if you happen to know of anyone who might be buying or selling their home..." | **Every single touch should have a quick reminder and instructions on how to give you referral business.** |
| **Week 5** | Send one of your free reports. | |
| **Week 6** | Send a real estate investment or house maintenance tip. | |
| **Week 7** | Send a refrigerator magnet, notepad, or other usable giveaway (not throwaway!) with your name, logo, and contact information on it. | |
| **Week 8** | Make another telephone call:<br><br>"Hello, this is _____ with Keller Williams Realty.  Did I catch you at a bad time?  How are you?  Did you happen to receive the _____ that I sent you?  That's great.  Did you have any questions?<br><br>As you can tell, I really hope you will allow me to be your Realtor® for life.  And also, let me just give you a quick reminder that if you happen to know of anyone who might be buying or selling their home, could you please share their name with me or my name with them…" | |

# *Using Action Plans*

*8 x 8 (continued)*

## Targeted 8 x 8 Plans

Along with your basic 8 x 8, you should have different versions of the 8 x 8 for various target groups (such as a FSBO version) to jump-start your 33 Touch. Having a more targeted message will greatly enhance the effectiveness of your lead generation.  From the list of sources below, put a check next to the ones for which you will develop customized 8 x 8 plans:

- ☑ **FSBO's** (remember, FSBO's require more face time)
- ☑ **Expired/Withdrawn Listings** (remember, these people may re-list quickly—this 8 x 8 will be 8-16 days, not 8 weeks)
- ☑ **Follow-up for Prospective Buyers**
- ☑ **Follow-up for Prospective Sellers**
- ☐ **My Geographic Farm** (to re-launch it)
- ☐ **My Demographic Farm(s)** (to re-launch it)
- ☐ **My Sphere of Influence** (to re-launch it)
- ☐ **Open House Attendees**
- ☐ **My Allied Resources**
- ☐ **Relocations**
- ☐ **Builders**
- ☐ **My IVR System captures**
- ☐ **Other:** _____

☑ *Regardless of other plans you may choose to include in your CMS, these are must have plans. The Keller Williams Realty version of TP 7i already has a standard version of the 8 x 8, which can be modified to other versions by adding appropriate activities (see below).*

When new contacts are entered in the CMS, the contacts should be identified by their appropriate group and contact type and placed on a corresponding 8 x 8 plan.

> *"Everyone we meet goes into our database.  Even though someone may not be an immediate buyer or seller, we put all of our Have Mets on an 8x8 plan to stay in touch."*
>
> BRUCE HARDIE
> THE HARDIE GROUP
> SPOKANE, WA

### *8 x 8: FSBO*

The 8 x 8: FSBO plan is for sellers who are trying to do a For Sale by Owner. The plan is designed to demonstrate to these sellers the value of using you as their agent in the sale of their home.  Your focus should be on communicating all of the various ways that you will market their home.  You may also communicate how important representation is when it comes to the legalities of selling a home.  One of the key items of value you will provide to communicate these messages to a For Sale by Owner is the **FSBO Packet** (see *MREA Operations Manual*).

*(continued on the next page)*

# *Using Action Plans*

*8 x 8 (continued)*

**NOTE:** *The 8 touches in the 8 x 8: FSBO can be done within a shorter period of time than eight weeks if you are in a competitive market.*

## 8 x 8: Expired/Withdrawn Listings

The 8 x 8: Expired/Withdrawn Listing plan is designed to convert sellers whose listing with another agent has expired.  One of the key items of value you will provide these sellers is the **Expired Packet** (see *MREA: Operations Manual*).

You will notice that the 8 x 8 plan for an Expired/Withdrawn Listing occurs in days, not weeks.  Thirty to fifty percent of all Expired/Withdrawn Listings will re-list within one week of expiration.  Seventy to eighty percent will re-list within thirty days.  So, it is critical with an Expired/Withdrawn listing that you make contact quickly and frequently within the first two weeks.

While the plan is numbered "day 1," "day 2," "day 3," etc., not all days occur consecutively.  Your goal should be to complete the entire plan within 2 weeks.  However, you don't want to overwhelm the seller or seem pushy, so you should allow a day between contacts.

## 8 x 8: Follow-up for Prospective Buyers

If a buyer does not sign a Buyer Representation Agreement with you after the Buyer Consultation, put them on this 8 x 8 designed to demonstrate the value of working with you.  You can also initiate the plan for buyers you meet at Open Houses and through your prospecting and networking.  In this plan, your marketing focus should be directed toward educating the buyer on what's happening in the market and how you can get them into the most amount of home for the least amount of money.

## 8 x 8: Follow-up for Prospective Sellers

If a seller does not sign a Listing Agreement with you after the Listing Consultation, put them on this 8 x 8 designed to demonstrate the value of working with you.  You can also initiate the plan for sellers you meet through your prospecting and networking.  In this plan, your marketing focus should be directed toward educating the seller on what's happening in the market and how you can get them the most money in the least time with the least amount of hassle.

# Using Action Plans

*8 x 8 (continued)*

## How to customize your 8 x 8 plan



In addition to the previously mentioned steps for customizing your action plans (see pg. 54), when customizing your 8 x 8 plans:

1. Schedule mailings before your calls or door-to-door prospecting. The benefit of making contact by mail first is that you have a built-in ice-breaker: "Hello this is _____ from Keller Williams Realty. Did you receive the _____ I sent you?"

2. Modify the 8 x 8 to work for you. For example, instead of six mail-outs and two telephone calls, do four mail-outs and four telephone calls; or instead of doing eight weeks, do twelve weeks (but never less than eight weeks). The point is for you to be systematic as you make contact over the eight weeks. It is better for you to modify this technique so that it works for you, rather than not doing it at all or doing it haphazardly.

**NOTE:** *Each time a contact is touched, take notes on what was said. Enter these notes into the* **Contact notes** *field of the contact record. When you call next time, you'll be able to ask them relevant questions about their lives (e.g., "How did your daughter's recital go?"), which strengthens the relationship.*

*Using Action Plans*

# 33 Touch

When a contact finishes their 8 x 8 plan or completes a transaction with you, they should be placed on an appropriate 33 Touch plan.  33 Touch is a systematic marketing and prospecting technique, which ensures *year-round* contact with all of the prospects, business contacts, and past clients in your contact database.  It cements your relationship with them and sustains ongoing communication.

Below is a sample 33 Touch.

| | |
|---|---|
| **14** | A combination of fourteen mailings, letters, cards, e-mails, or drop-offs (which might include your business card) and may be one of the following: letter of introduction, your personal brochure, market reports, Just Sold/Just Listed cards, your personal newsletter, recipe cards, property alerts, real estate news or articles, community calendars, invitations, service directories, promotional items, etc. |
| **8** | Thank You or Thinking of You cards |
| **3** | Telephone calls |
| **4** | Personal Observance Cards (birthdays, anniversaries, mother's day, father's day, graduation, anniversary of their home purchase, etc.) |
| **4** | Holidays (Thanksgiving, Fourth of July, etc.) |
| **33** | **Touches Total** |
| ➔ | **Every single touch should have a quick reminder and instructions on how to give you referral business and identify the benefits of working with your team.** |

**NOTE:** Y*ou will be launching different contacts on 33 Touch plans at various times throughout the year, so activities that are tied to fixed calendar dates (i.e., Holidays and Personal Observances) must be entered separately from the database action plan (see pg. 56). Because of this, you will notice that the 33 Touch plan in TP 7i is actually comprised of fewer than 33 activities.*

# *Using Action Plans*

***33 Touch (continued)***

## Targeted 33 Touch Plans

Once you have a basic 33 Touch plan, create different versions for your various groups.  Having a more targeted message will greatly enhance the effectiveness of your lead generation.  From the list below, put a check next to the ones for which you will develop customized 33 Touch plans:

- ☑ **Client for Life**
- ☑ **Advocate Appreciation Program**
- ☐ **My Sphere of Influence**
- ☐ **My Allied Resources**
- ☐ **Other:** _____

☑ *Regardless of other plans you may choose to include in your CMS, these are must have plans. The Keller Williams Realty version of TP 7i already has a standard version of the 33 Touch, which can be modified to be either a Client for Life or Advocate Appreciation version by adding appropriate activities (see below).*

When contacts finish their plan or refer business, they should be placed on an appropriate 33 Touch plan.

### *33 Touch: Client for Life*

The 33 Touch: Client for Life plan is designed to keep you in constant contact with past clients to ensure that they will continue to do business with you.  It also serves as a regular reminder to clients of how well you treat your customers.  This is a great way of turning clients into advocates.

If a contact is currently on an 8 x 8 plan or the standard 33 Touch plan, cancel that plan and place them on the 33 Touch: Client for Life plan as soon as their transaction is complete.  However, if a contact is currently on the 33 Touch: Advocate Appreciation plan, do not change them to the Client for Life plan. Leave them on the Advocate Appreciation plan.

### *33 Touch: Advocate Appreciation*

The 33 Touch: Advocate Appreciation plan is for clients in your database inner circles (Allied Resources, Advocates, and Core Advocates) who have either referred business or committed to referring business to you.  You will **include items of value** in this plan to show your appreciation for their help in growing your business.

*"Over 65% of our business comes from past clients and referrals.  You must stay in touch on a regular basis to build a network of referral resources."*

*RICHARD BASS*
*THE BASS GROUP*
*BOCA RATON, FL*

*(continued on the next page)*

# *Using Action Plans*

*33 Touch (continued)*

Items of value include such things as investment tips, school calendars, New Year calendars, home tips, baseball or football schedules for their favorite team, or other promotional items. To save time and money, plan and budget for your items of value prior to the beginning of the year.

If a contact is currently on an 8 x 8 plan or another 33 Touch plan, cancel that plan and place them on the 33 Touch: Advocate Appreciation plan as soon as they refer or pledge to refer business.

## *How to customize your 33 Touch plan*

In addition to the previously mentioned steps for customizing your action plans (see pg. 54), when customizing your 33 Touch plans:

1. Some of the 33 touches involve activities that fall on specific dates (Holidays and Personal Observances), so you cannot schedule them as part of the action plan. Instead, calendar those activities separately (see pg. 56).

2. Schedule mailings before your prospecting. The benefit of making contact by mail is that it makes it easier for you to call (or drop by) and say, "Hello this is _____ from Keller Williams Realty. Did you receive the _____ I sent you?" and break the ice.

3. Modify the 33 Touch to work for you. For example, instead of doing 33 touches, do 24 touches; or instead of sending Mother's and Father's Day cards, send home tips or market statistics. The point is for you to be systematic as you make regular contact throughout the year. It is better for you to modify this technique so that it works for you, rather than not doing it at all or doing it haphazardly. But remember, frequency matters—the more the better.

4. Keep emails limited to no more than 7.

**NOTE:** Each time a contact is touched, take notes on what was said. *Enter these notes into the* **Contact notes** *field of the contact record. When you call next time, you'll be able to ask them relevant questions about their lives (e.g., "How did your daughter's recital go?"), which strengthens the relationship.*

# *Executing Lead Generation Activities*



**1. Generating Leads**

As discussed in the first chapter, the Today's business screen is your daily dashboard. There, you will find all of the activities that you must complete to build and maintain relationships with your contacts. Every time you log in to TP 7i, you should check Today's business and complete all of the activities that have come due for the day.

**NOTE:** *You may also see your daily, weekly, monthly, and annual calendar in TP 7i by clicking on* **Schedule>My Schedule** *in the top toolbar.*

T he Today's business feature is a great way of quickly seeing the activities you must accomplish for any given day. But like many agents, Gene Arant finds himself out of the office so much that being tied to a desktop computer isn't realistic for his business. Gene's solution was to use TP 7i for Palm to take his database with him on his Palm phone. Not only is he able to view and enter activities and information about his contacts into his Palm, but because it is a Palm *phone*, he can also synchronize his database with his Palm from anywhere, at anytime.

With his database on his Palm phone, Gene can also effectively manage the activities of his team from the field using Today's business. "My communication to my Administrative and Marketing Manager is much more efficient with 7i. I can check to see what the status is of my marketing, closings, listings, and buyers, all by looking at what is on his schedule."

Being out of the office so often, Gene relies on his Administrative and Marketing Manager to keep his schedule updated. "It's great that he can do all my scheduling from his computer, and we are linked in real time. It does not matter where I am in the world, I get updated or can go online and be just like I am sitting at my desk."

Contact management really does give you the flexibility to work the way you need to—just ask Gene.

# Executing Lead Generation Activities

## How to set Today's business as your start page

The start page is the first thing you see after you login to TP 7i. To make Today's business your start page:

1. In the top toolbar, click **Setup**>**Preferences**>**General**.

2. Under **Auto display on start up**, select **Today's business**.

3. ✅ OK

> *"The **Today's Business** feature of TOP PRODUCER is the control panel for our business."*
>
> *MARY HARKER*
> *THE HARKER FIVE-STAR TEAM*
> *DALLAS, TX*

## How to configure Today's business

TP 7i allows you to view activities that are due for a given **Date range** or team member:
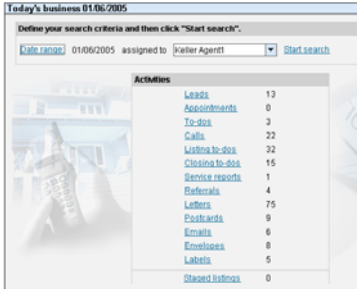
1. In the top toolbar, select **Schedule**>**Today's business**>**Summary**.

2. **Date range –** Depending on the number of contacts you have in your database, you may not want to send out mailers (e.g., letters, postcards, etc.) on a daily basis. This would be especially true if you only have a few mailers due on a daily basis.

   To save time and postage by mailing your due mailers out in bulk, you can temporarily change the date range in **Today's business** to show all mailers due for a week, month, or a range of your choosing. This allows you to send them all out together. Simply click on **Date range**, enter the **From** and **to** dates, and click **OK**. Click **Start Search**.

3. **Assigned to –** If you have team members, you can also choose to view all mailers, calls, etc., due for the team or for any one team member by choosing the name of the team member or **All** from the **assigned to** drop-down menu. Click **Start Search**.

4. If you will be out of the office and won't have access to your database either through a computer or a Palm device, you can click **View report** in the left-hand navigation to print out a multi-page report of all activities currently due in **Today's business**. The report includes the contact information for any contacts for which calls, letters, etc., have come due.

# *Executing Lead Generation Activities*

## Letters

In addition to the wide array of letter templates that TP 7i comes with, Keller Williams Realty has also added letter templates for our associates. All of these letter templates can be found in the Communication library.

### *How to print letters*

When a letter comes due in Today's business:

1. In the top toolbar, select **Schedule**>**Today's business**>**Summary**.

2. Click **Letters**.

3. In the **Letters assigned to…** screen, you will see all due letters.

4. If you also wish to print letters that may be due in the near future, you can adjust the **Activities from…to…** fields by clicking on the calendar icons beside each field and choosing the appropriate dates.

5. You can choose to print letters for other team members by selecting from the **assigned to** drop-down menu.

6. If you wish to view or edit any of the letters before printing, double-click on the appropriate letter and click **View or edit letter**. After making changes to your letter, click ✅ **OK** .

7. Click ✅ **OK** again to return to the **Letters assigned to…** screen.

8. Repeat editing individual letters as necessary.

9. To print your letters, hold down the **Ctrl** key to select multiple contacts in the list or click **Select all** (if you select all, you can hold the **Ctrl** key and click on names to deselect them from the list).

10. Select **Print letter** from the left-hand navigation.

11. In the **Print** prompt, select your **Printer**, **Paper Size**, **Paper Source** (i.e., tray), and **Layout**.

12. **Print envelopes or labels** – after you print letters, a prompt appears that gives you the choice of printing an **Envelope** or **Label** to go with the letters. Choose which you wish to print, **Envelope** or **Label**. If you choose not to print either click **Cancel**.

13. If you have not selected an envelope or label template to accompany the letters, click **Select the…you want to print**.

14. Double-click the envelope or label template you want.

*(continued on the next page)*

# *Executing Lead Generation Activities*

15. Select **Print** to print right now.

16. By selecting **Print Later**, you can print all of your envelopes or labels at once to save time. The envelope or label will appear as an activity in **Today's business**, under **Envelopes or Labels**.

17. Printing a letter automatically marks the activity done and stores a copy of the letter in the contact record under **View history**.

## Postcards

There are several ways to use TP 7i to mail out postcards:

1. Have postcards pre-printed on the front at a printer. These postcards then allow you to quickly print information (e.g., Just Listed, Just Sold, etc.) and the contact's address on the back of the card.

2. Have a batch of cards (e.g., seasonal cards) pre-printed front and back at a printer and use your TP 7i software to simply print labels for the cards.

3. Use TP 7i to print postcards both front and back.

   **NOTE:** *This last option is not recommended unless you are printing on a high-quality commercial printer than can handle bulk quantities.*

### *How to print postcards*

When a postcard comes due in Today's business:

1. In the top toolbar, select **Schedule**>**Today's business**>**Summary**.

2. Click **Postcards**.

3. In the **Postcards assigned to…** screen, you will see all postcards due at that time.

4. If you also wish to print postcards that may be due in the near future, you can adjust the **Activities from…to…** fields by clicking on the calendar icons beside each field and choosing the appropriate dates.

5. You can choose to print postcards for other team members by selecting from the **assigned to** drop-down menu.

6. If you wish to view or edit any of the postcards before printing, double-click on the appropriate postcard and click **View or edit postcard**. After making changes to your postcard, click ✅ **OK**.

7. Click ✅ **OK** again to return to the **Postcards assigned to…** screen.

8. Repeat editing individual postcards as necessary.

*(continued on the next page)*

## *Executing Lead Generation Activities*

9. To print your postcards, hold down the **Ctrl** key to select multiple contacts in the list or click **Select all** (if you select all, you can hold the **Ctrl** key and click on names to deselect them from the list).

10. Select **Print postcard** from the left-hand navigation.

11. In the **Print** prompt, set up the **Orientation**, **Alignments**, **Postcards per page**, and **Margins & Spacing** for your postcards.

12. Under **Paper size & Printer options**, select your **Printer**, **Paper Size**, and **Paper Source** (i.e., tray). Click **OK**.

13. Printing a postcard automatically marks the activity done and stores a copy of the postcard in the contact record under **View history**.

## Envelopes and Labels

In addition to printing envelopes and labels with letters, you may also need to print batches of envelopes or labels for mass mailings. TP 7i has several envelope and label sizes as templates in the Communication library.

*How to print envelopes or labels*

When an envelope or label comes due in Today's business:

1. In the top toolbar, select **Schedule**>**Today's business**>**Summary**.

2. Click on **Envelopes** or **Labels**.

3. In the **Envelopes** (or **Labels**) **assigned to…** screen, you will see all items due at that time.

4. If you also wish to print envelopes (or labels) that may be due in the near future, you can adjust the **Activities from…to…** fields by clicking on the calendar icons beside each field and choosing the appropriate dates.

5. You can choose to print envelopes (or labels) for other team members by selecting from the **assigned to** drop-down menu.

6. If you wish to view or edit any of the envelopes (or labels) before printing, double-click on the appropriate envelope (or label) and click **View or edit envelope** (or **label**). After making changes to your postcard, ✅ **OK**.

7. Click ✅ **OK** again to return to the **Envelopes** (or **Labels**) **assigned to…** screen.

8. Repeat editing individual envelopes (or labels) as necessary.

*"We use TOP PRODUCER to print labels each month for our farm and client mailings. It's fast, economical, and easy to update our mailing list when we want to."*

*JAN RICHEY*
*THE JAN RICHEY TEAM*
*FRISCO, TX*

# *Executing Lead Generation Activities*

9.  To print your envelopes (or labels), hold down the **Ctrl** key to select multiple contacts in the list or click **Select all** (if you select all, you can hold the **Ctrl** key and click on names to deselect them from the list).

10. Select **Print envelope** (or **label**) from the left-hand navigation.

11. **Printing envelopes –** in the **Print** prompt, set up the **Orientation** and select your **Printer**, **Paper Size**, and **Paper Source** (i.e., tray).

    **Printing labels –** in the **Print** prompt, set up where to begin printing, how many labels per contact, the **Printer**, and the **Paper Source** (i.e., tray).

12. Select **OK**.

13. Printing an envelope or label automatically marks the activity done and stores a copy of the envelope or label in the contact record under **View history**.

## Mass Mail

For Andy Allen, of The Allen-Lancaster Company, leverage is a beautiful thing. That's why his team leverages contact management software to stay in constant communication with a database of over 1,500 contacts through mass mailings. And the best part for Andy is that, although he doesn't spend a huge amount of his time managing it, his clients don't notice the difference.

"I sold a home to a young couple," Andy recalls, "and six years later, when they decided to sell their home, they called me once again. Now, in those 6 years, they had sent us 4 referrals, the most recent of which was a million dollar lot on the lake."

"Although I no longer handle the sales on my team, I made it a point to talk to them during their transaction to thank them for continually thinking of me over the years with their referrals," he explains. "I was amazed when they replied, 'We really appreciate you staying in touch with us over the years.' These are people I would never have had the time to even think about, but because they were in my database and receiving monthly pieces from me, they felt like I was thinking of them each and every month."

Contact management is lead generation leverage—just ask Andy.

# Executing Lead Generation Activities

As part of your 33 Touch plans, you will schedule several mass mailings (see pg. 56) throughout the year (e.g., Holiday mailers, etc.). Scheduled mass mailings will come due in Today's business under the assigned activity type (e.g., **To-dos**, **Letters**, etc.). However, from time to time, you will need to send out an unscheduled mass mailing for certain occurrences, such as Just Listed or Just Sold cards.

## *How to send out a mass mailing*

To set up an unscheduled mass mailing:

1. In the top toolbar, click on **Mail>Perform mail out**.

2. Select the type of mailing (i.e., letter, postcard, etc.).

3. Select the category from the **…categories** drop-down menu.

4. Select the template you wish to use from the list.

   **NOTE:** *Click **Change template for this mailing only** to edit the template for the current mailing.*

5. ○ **Next**

6. In the **Perform mail out – search contacts** screen, when searching for contacts:

   *a.* Select the contact record field you want to search your database for and enter the appropriate piece of information in the **Search for** field.

   **Or**

   *a.* Click the **Advanced search** tab for more searching options.

   *b.* Select the appropriate **Search category**, **Search criteria**, and **Search for** fields. When you have selected the appropriate search conditions, click ➡ to add them to the **Perform search based on:** box.

7. ○ **Start search**

8. In the **Perform mail out – select contacts** screen, select the appropriate contacts in the **Available contacts**. Hold down the **Ctrl** key to select multiple contacts or click **Select all** (if you select all, you can hold the **Ctrl** key and click on names to deselect them from the list).

9. Click **Add**. Click **Total count** below the right-hand box to see how many contacts you will be mailing.
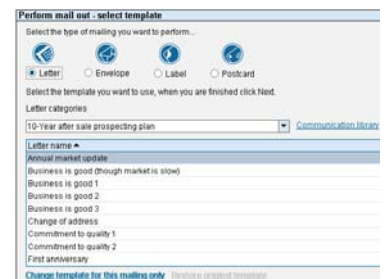
*(continued on the next page)*

# *Executing Lead Generation Activities*

**10.**   Next

**11.**  In the **Perform mail out – view or edit letter** screen, you will see a preview of the mailer customized to the first contact in your list.  To scroll through each contact's mailer click **Previous contact** or **Next contact**.

**12.**   Print now to print right now. Or  Print later to set the mass mailer to come due in Today's business under the appropriate activity type (i.e., letter, postcard, etc.).

**13.**  Printing a mass mailer using a contact's record automatically marks the activity done and stores a copy of the mass mailer in the contact record under **View history**.

## Exporting Your Database

TP 7i allows you to export your contact records to a file that you can send to a third-party vendor (e.g., printer, direct mail firm, etc.) for mass mailings.
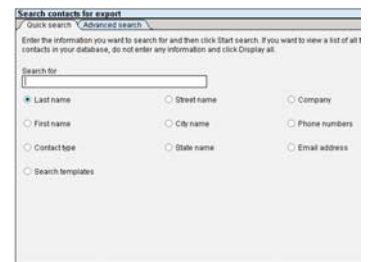
### *How to export your database*

To export your database:

**1.**  In the top toolbar, click **Setup**>**Data transfer/conversion**>**Export data**.

**2.**  In the **Export contacts** screen, choose whether you will **Export all contacts** or **Search for contacts to export**.  When searching for contacts to export:

**a.**  Select the contact record field you want to search your database for and enter the appropriate piece of information in the **Search for** field.

**Or**

**a.**  Click the **Advanced search** tab for more searching options.

**b.**  Select the appropriate **Search category**, **Search criteria**, and **Search for** options.  When you have selected the search conditions, click  to add them to the **Perform search based on:** box.

*(continued on the next page)*

# *Executing Lead Generation Activities*

3. ⊙ **Start search**

4. Select the appropriate contacts in the **Available contacts**.  Hold down the **Ctrl** key to select multiple contacts or click **Select all** (if you select all, you can hold the **Ctrl** key and click on names to deselect them from the list).

5. ⊙ **Next**

6. In the **Export contacts to a file** screen, select the appropriate **Export options** to export the data you need.

7. ⊙ **Start export**

8. Save the file to your computer.

9. The **Exporting records to file…** message box will display while TP 7i is exporting.  When TP 7i is done exporting, the **Export complete** prompt will appear.  Click **OK**.  You now have a file that you can email to a third-party vendor.

# *Executing Lead Generation Activities*

## Emails

Getting top-of-the-mind awareness with consumers is about getting your message in front of them frequently, and eMarketing provides another avenue to do this. By combining emails into your overall marketing program, you ensure that more people will see your message. And email can be a great way to mix things up, so your method of contact doesn't get stale.

The key to email, like your offline marketing, is consistency. This entails not only the frequency with which you send email messages, but also the look and feel of your email. Like offline marketing, your email messages should be consistent with your branded image. The fonts, colors, photos, and messages that you use in your emails should look like your mailers, ads, and other marketing materials. Consistency in your emailing provides your contacts the necessary exposure to your message, and it also provides you the opportunity to determine what does and does not work in eMarketing.

However, be careful not to overdo it. A simple rule of thumb is to send out no more than one marketing email every three weeks. And never send out an email unless it has something of value for the consumer.

Email also gives the consumer more choices as to how to communicate with you (by phone, mail, or email). Part of giving them this choice is allowing them to choose not to receive email from you. Every email you send should offer consumers the opportunity to "opt out" of your email marketing program. However, if you are providing value to them, you will significantly decrease your opt out rate.

*Tip! – By using TP 7i to send and receive your email, all of your emails sent to and received from your contacts can be stored with each contact's record for quick access to your past correspondences.*

## Sending Emails

As described earlier, you can set up emails as part of your plans (see pg. 54). When scheduling emails in TP 7i, you can choose to send them manually as they come due, or you can set them up to go out automatically. TP 7i also allows you to send mass emails through the email manager. In addition to the variety of email templates already in TP 7i, Keller Williams Realty has added email templates for our associates. Email templates are auto-populated with data from your contact records using merge codes for quick and easy personalized eMarketing.

# *Executing Lead Generation Activities*

## *How to send scheduled emails manually*



If you create emails as part of your plans, but choose not to send them out automatically, they will come due in the **Emails** field of **Today's business**. When an email comes due:

1. In the top toolbar, select **Schedule**>**Today's business**>**Summary**.

2. Click **Email**.

3. In the **Emails assigned to…** screen, you will see all emails due at that time.

4. If you also wish to send emails that may be due in the near future, you can adjust the **Activities from…to…** fields by clicking on the calendar icons beside each field and choosing the appropriate dates.

5. You can choose to send emails for other team members by selecting from the **assigned to** drop-down menu.

6. If you wish to view or edit any of the emails before sending, double-click on the appropriate email and click **View or edit email**. After making changes to your email, click ✔ **OK** .

7. Click ✔ **OK** again to return to the **Emails assigned to…** screen.

8. Repeat editing individual emails as necessary.

9. To print your emails, hold down the **Ctrl** key to select multiple contacts in the list or click **Select all** (if you select all, you can hold the **Ctrl** key and click on names to deselect them from the list).

10. Click **Send** in the left-hand navigation.

11. If you do not wish to send the emails, select **Delete** from the left-hand navigation or change the **Date** to send it out later.

    **NOTE:** *Do not choose **Mark done**, or the email will appear in the contact history as if you had actually sent it out. This will show up on some service reports, which would confuse your clients.*

12. Sending an email using a contact's record automatically marks the activity done and stores a copy of the email in the contact record under **View history**.

13. You can also choose **View report** to see the contact's email history.

> *"We use TP email, and the ability to keep a history of a client and transaction in one place is extremely beneficial to my business."*
>
> *CYNDI CUMMINGS*
> *LAKE TRAVIS, TX*

# Executing Lead Generation Activities

## How to create and send individual emails



From time to time, you will also have to send out emails that aren't part of your plans. To create and send an email on the fly:

1. In the top toolbar, click **Contacts**>**Address book**.

   **NOTE:** *If you would like to send an email using a template, do not use the **Address book** or **My Email**. Instead, you must use the Mass email feature (**Email**>**Mass email**.)*

2. Find the contact's name by clicking on the first letter of their last name beside the address book and/or using the arrows to scroll. Click on the contact's name. In the left page of the **Address book**, click on the email address in the **Contact information** field.

   **NOTE:** *If you have not set up your email account in TP 7i, see pg. 22.*

3. In the **New email message** composer, enter any other email addresses you wish to send the email to or choose from contacts in your address book by clicking **To**, **Cc**, or **Bcc**.

4. Enter the **Subject** of your email.

5. By clicking **Attachments**, you will bring up the **Attachments** screen. Click **Attach file** in the lower portion of the **Attachments** screen to search your computer for a file to attach to the email.

6. The email editor toolbar is similar to other webmail toolbars. You can hover your mouse pointer over any of the buttons for a pop-up to explain what the button is.

7. **Insert signature –** click on this link below the text field to insert your signature from your agent contact record.

8. **Insert company logo –** click on this link below the text field to insert your logo from your agent contact record.

9. **Insert user photo –** click on this link below the text field to insert your photo from your agent contact record.

10. **Insert link –** click on this link below the text field to insert one of your marketing links to send your contacts to the Internet for published documents, service reports, and flyers or to view a particular website.

11. **Clear message –** if you wish to start over, this will delete everything you have typed in the message field.

12. **Send** . **Save** places a copy of the email in the **Drafts** folder of **My email**. It will not appear as a due email in Today's business.

13. Sending an email using a contact's record automatically stores a copy of the email in the contact record under **View history**.
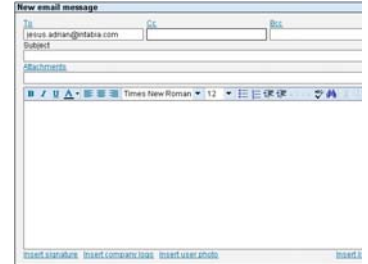
# *Executing Lead Generation Activities*

## Mass Emails

According to IMT Strategies, a leading Internet research firm, the #1 reason people open email is that they trust the sender. This kind of relationship is built by consistently adding value to every email you send.

Since value is subjective, your eMarketing program (like your marketing program) must be targeted. This means sending different messages to different database groups based on their needs. This is why an effective eMarketing program must be built, not bought. Purchasing email lists doesn't provide you with the kind of information you need in order to know what your consumers want.

Email lists are very easy to build if you are offering value from the start. There are several great ways to get email addresses from prospects at your open houses and on your website:

1.   Advertise promotional give-aways to those who sign up.

2.   Offer free CMA's on your website through online forms.

3.   Offer emailable reports

Sending your customers something they value can also pay off in ways other than just building a relationship with them. If your emails are valuable and interesting, customers will help you establish new relationships by forwarding your emails to their family and friends.

### *How to send out mass emails*

TP 7i also has a **Mass email** function that allows you to use an email template:

1.   In the top toolbar, click **Email**>**Mass email**.

2.   From the **Category** and **Template** drop-down menus, select the appropriate template for the email.

3.   Click **Use this template**, and the template will appear in the email text field.

4.   Click **To** to select the recipients for your email.

5.   In the **Select contacts** screen, choose a **Search contact by** option. Enter the appropriate search information in the field provided. **Start search**
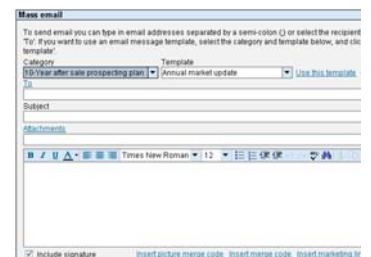
# *Executing Lead Generation Activities*

Select the appropriate contacts in the **Available contacts** list.  Hold
down the **Ctrl** key to select multiple contacts or click **Select all** (if you
select all, you can hold the **Ctrl** key and click on names to deselect them
from the list).  Click **Add**.  ✅ **OK**

6.   Enter the **Subject** of your email.

7.   By clicking **Attachments**, you will bring up the **Attachments** screen.
Click **Attach file** in the lower portion of the **Attachments** screen to
search your computer for a file to attach to the email.

> **NOTE:** *Making changes in the **Mass email** screen will change the
> template for all emails in the mass email.  The email editor
> toolbar is similar to other webmail toolbars.  You can hover
> your mouse pointer over any of the buttons for a pop-up to
> explain what the button is.*

8.   **Include signature –** if you wish to use your signature from your agent
contact record, make sure this box is checked.

9.   **Insert picture merge code –** in the **Insert picture merge code**
prompt, click on **Select merge code**.  Select the appropriate **category**
and **merge code** for the template.  Click **OK**.  Click **OK**.

10.  **Insert merge code –** insert contact information based on the contact's
record.  **Select category** and **Select merge code** for the template.  Click
**OK**.

11.  **Insert link –** click on this link below the text field to insert one of your
marketing links to send your contacts to the Internet for published
documents, service reports, and flyers or to view a particular website.

12.  🔵 **Next**

13.  In **the View or edit email for…** screen, you can edit and preview each
individual email.  To scroll through the individual emails, click
**<<Previous** or **Next>>**.

14.  ✉️ **Send**

15.  Sending an email using a contact's record automatically marks the activity
done and stores a copy of the email in the contact record under **View
history**.

*(continued on the next page)*

# Executing Lead Generation Activities

## Receiving Emails

In addition to being able to check incoming emails from any Internet-ready computer, receiving email through TP 7i has the added benefit of allowing you to quickly create new contact records from received emails. It also allows you to attach received emails to contact records for a detailed contact history.

TP 7i allows you to link an email from any sender to both their own existing contact record and any relevant contact's record, such as when you are emailed by a contact's spouse or a contact emails you from a second email address not listed in their contact record. You can even link closing party emails to the contact records of your buyers and sellers.

In the email Inbox, you will notice that TP 7i links emails from contacts in your database that it recognizes to their contact record. This is denoted by the chain link icon 🔗 next to the **From** field. You can erase these emails from your Inbox, and copies of them will still be viewable under **View history** in the contact record.

### How to create a new record from received email



1.  In the top toolbar, click **Email>My email**.

2.  Highlight the desired email by clicking on it and click on **Create Contact** at the bottom of the screen.

3.  You will notice that information from the **From** field (such as name and email) of the sender's email is automatically inputted into the contact's new record.

4.  Enter any additional information that you have for the contact. ✅ OK

    **NOTE:** *TP 7i will not automatically check for new emails while you are in **My email**. If you are in **My email** for any length of time, you should occasionally click **Check email** in the left-hand navigation.*
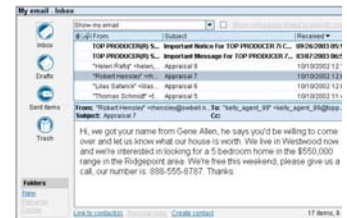
### How to link email to a current contact record



To link emails to contact records:

1.  In the top toolbar, click **Email>My email**.

2.  Highlight the desired email by clicking on it and click on **Link to contact(s)** below the text field to bring up the **Select contact(s)** screen.
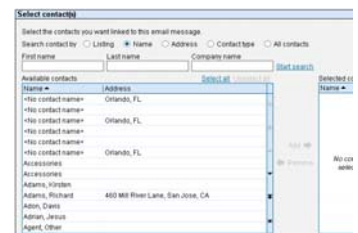
# *Executing Lead Generation Activities*

3. **Search contact by –** allows you to choose how you wish to search for the contact's record to which you want to attach the email. Enter the appropriate search information into the search field. **Start search**

4. Highlight the appropriate contact(s) by clicking on an individual record, holding the **Ctrl** key while selecting multiple records, or clicking on **Select all**. Click **Add** to place the chosen contact record(s) in the **Selected contacts** box.

5. **OK** . The email will be saved under **View history** in the contact record to which you linked it.

## Calls

As part of your activity plans, you will schedule several phone calls throughout the year to your contacts. These calls are great opportunities for you to:

1. Build the relationship

2. Offer value to your contacts

3. Educate, ask, and reward for referrals

Before you make a call, be sure to look over the **Contact notes** in the contact record for the contact and address any relevant information in the call. Being able to speak about past events (e.g., wedding, funerals, graduations, etc.) that have happened in their lives will let them know that you care.

TP 7i for Palm allows you to take your database with you wherever you go with complete contact records. By synching your Palm with TP 7i, you will have the Today's business feature on your Palm to remind you of due activities. You will also be able to call up the contact records for contacts on your Palm device (for more information on using TP 7i on your Palm, in the top toolbar, select **Help**>**Download user guides**. In the **Download User Guides** screen, download the appropriate guide.).

If you do not use the Palm version of TP 7i, you can also print a list of due calls with the contact's record, including **Contact notes** and contact history. This allows you to take your database with you to make your lead generation calls wherever you go.

*"We use our Palm Pilot to sync with our TOP PRODUCER database, allowing us to keep track of our appointments, clients, and listing files when we are out of the office."*

*JAN RICHEY*
*THE JAN RICHEY TEAM*
*FRISCO, TX*

# Executing Lead Generation Activities



Most agents know that they *should* be making regular prospecting calls to their database, but not all of them actually *do*. Many of those that don't make regular calls miss great opportunities simply because they forget to call when they're supposed to. That's why Debbie Zois, of Debbie Zois & Associates, relies on her database to hold her team accountable for consistently touching her contacts.

Debbie has a complete lead management system built around her database. As part of the system, her Buyer and Listing Specialists receive a print out every week from her Marketing Administrator of all of the prospecting calls they must make for the week. The specialists make their calls and take follow-up notes on their call lists, which are then turned back in to the Marketing Administrator for entry into the contact records. This system ensures that everyone in her database is consistently touched, which is important to Debbie because, as she says, "Forgetting to keep in touch with a contact could cost you a lot of money."

And using her database to hold her team accountable has paid off for Debbie. In 2004, Debbie Zois & Associates received the double-platinum award for generating over $1 million in GCI. That's the power of leveraging a great database in your business. "We wouldn't be where we are today without it," says Debbie.

Contact management works to ensure that what needs to get done, gets done on time—just ask Debbie.

## How to handle scheduled calls



Your TOP PRODUCER database will remind you when scheduled calls come due in Today's business:

1. In the top toolbar, select **Schedule**>**Today's business**>**Summary**.

2. Click on **Calls**.

3. In the **Calls assigned to…** screen, select the appropriate contacts from the list by clicking on the contact's name. Hold down the **Ctrl** key to select multiple contacts or click **Select all** (if you select all, you can hold the **Ctrl** key and click on names to deselect them from the list).

# *Executing Lead Generation Activities*

4. Click **View or edit contact** in the left-hand navigation to open the record(s). If you selected more than one record, you can scroll through the various records by clicking **<Previous** or **Next>**. By clicking **Active list** at the bottom right of the screen, you can call up a prompt with a list of all contacts you selected and double-click on a contact's name to view their record.

5. As you are speaking with a contact, be sure to take notes on what was said. When you are finished with the call, be sure to record those notes in the **Contact Notes** field by clicking **Add new**.

6. When you are finished with the call, click **Next call date**. Click **Mark done** in the left-hand navigation. The **Mark done** prompt will appear. Click **Yes**.

   **NOTE:** *Marking the call as done automatically records the call in the contact record under* **View history**.

7. If the contact is on a plan, the date of your next scheduled phone call will appear in the **Next call date** field. If the contact is not on an action plan or there are no more scheduled calls in their plan, the **Next call date** field will be blank. You can add or change a **Next call date** by clicking on the pick-box next to the field.

8. ⊗ **Close**. If you have several contact records open, the **Close contact(s)** prompt will appear. Click **Close** to close only the current record, or click **Close to all** to close all open records.

## *How to print call lists*



If you do not have the Palm feature as part of your TP 7i subscription, you can still take your call lists with you wherever you go in a printed format:

1. In the top toolbar, select **Schedule**>**Today's business**>**Summary**.

2. Click on **Calls**.

3. In the **Activities from… to…** field, use the pick-boxes to set the date range for which you want to view due calls. If you know that you will be out of the office for the next few days, you can print your due call list for those days.

4. Select the appropriate contacts from the list by clicking on the contact's name. Hold down the **Ctrl** key to select multiple contacts or click **Select all** (if you select all, you can hold the **Ctrl** key and click on names to deselect them from the list).
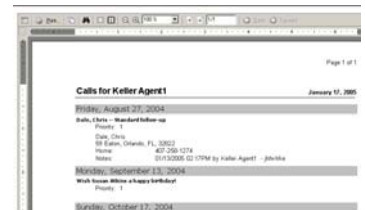
*(continued on the next page)*

# Executing Lead Generation Activities

5.   Once you have highlighted the names of all of the contacts you will call, click **View report** in the left-hand navigation.

6.   In the **Report** screen, click **Print** in the top toolbar.  The printed notes have a large margin for note taking that you can later add to the **Contact notes** in the contacts' records.

7.   Be sure that you **Mark done** calls (see pg. 83) that you have completed.

## Scheduling Follow-up Activities

In addition to scheduling dated activities (see pg. 56), you will find that, in the course of making contact with individuals in your database, you may need to follow up with them with some sort of contact that is outside your regular database plan.  This could range anywhere from sending documents to making a follow-up phone call.

*How to schedule follow-up activities*

When you need to follow up with a contact:

1.   In the top toolbar, click on **Contacts**>**Address book**.

2.   Find the contact's name by clicking on the first letter of their last name beside the address book and/or using the arrows to scroll.

3.   Double-click on the contact's name.

4.   In the left-hand navigation, click **Schedule follow-up**.

5.   Choose the **Activity type**.  **Next**

6.   **Activity details** – choose the **Description** of activity from the pick-box or type in your own description.  Set the appropriate **Date** and **Time** (if applicable for the activity) to come due in TP 7i.  Choose the responsible team member from the **Assigned to** drop-down menu.  By clicking on **Contacts**, you can select other contacts to whom you would like to apply the activity.  You can even attach contacts of a particular **Contact type**.  If you are sending an email, a letter, or a postcard, you can attach pre-filled templates.

*(continued on the next page)*

# *Executing Lead Generation Activities*

7.  **Link to** – if the activity is part of a **Listing** or a **Closing**, you can search your database to attach the property record to the activity. The activity, when marked done, will then show up on service reports.

8.  **Occurrence –** you can set activities up to be **One time** occurrences or regularly **Repeating** occurrences. If you set the activity to repeat, click on **Setup repeating activity** to set the frequency and the beginning and ending occurrences for the activity.

9.  **Reminder and Drop off** – you can set an advance **Reminder** in order to send letters and postcards in time to get to your contacts on the appropriate day. By checking the **Apply drop off…** box, TP 7i also allows you to set the number of days that you would like to elapse before unperformed activities drop off your Today's business list.

✓**Finish**

## Maintaining Contact Notes

It is very important that you and your team record the relevant highlights of any correspondence or meeting with a contact in the **Contact notes** field of their contact record. Recalling important details about a client lets them know that they are important, but this can be difficult with a large database. It can also be very difficult with a team of people who each interact with the contact.

Keeping notes in TP 7i allows you to be able to quickly look at the client's contact record and carry on a continuing dialogue with them. TP 7i will even automatically record the date the notes were taken and the name of the team member who entered them.

In addition, TP 7i records completed activities, such as sent calls, emails, letters, and postcards, in **View history** in the contact record whenever you mark done a scheduled activity.

The things you should be recording in **Contact notes** are:

1.  Major topic(s) of conversation

2.  Promises you've made to the contact (be sure to schedule a follow-up activity if appropriate)

3.  Relevant details about the contact (e.g., favorite restaurant, etc.)

4.  Upcoming events in their lives (be sure to schedule a follow-up activity if appropriate)

*"Keep notes about your clients and your conversations in your database. It shows you listen when you can recall a comment someone made in a prior conversation."*

*RICHARD BASS*
*THE BASS GROUP*
*BOCA RATON, FL*

# Executing Lead Generation Activities

*How to maintain contact notes*



After meeting with a contact:

1.  In the top toolbar, click **Contacts**>**Address book**.

2.  Find the contact's name by clicking on the first letter of their last name beside the address book and/or using the arrows to scroll.

3.  Double-click on the contact's name.

4.  In the **Contact notes** field, record any notes about the encounter by clicking **Add new**.

5.  Be sure to **Schedule follow-up** activities if necessary.

6.   **Close**

YOUR BUSINESS IS YOUR DATABASE

# *Chapter 4: Managing Leads*

## Objectives:

*[1]* *Automatically funnel leads from your website and Interactive Voice Response into TP 7i*

*[2]* *Automatically assign automated leads to action plans.*

*[3]* *Create lead sources and create referrals in TP 7i for more effective marketing.*

*[4]* *Track lead follow-up, leads per source, leads to closed business, and referrals to increase your team's productivity.*

# *F.A.S.T. Leads*

**2.
Managing
Leads**

### Funnel

Leads are funneled into a
single point of entry for
the business.

referrals

website    emails

Leads

### Assign

Leads are assigned to the
appropriate plan and team
members.

### Source

Leads are sourced in order to
calculate the return on investment
for various marketing and
prospecting activities.

00 11 01

### Track

Leads are tracked in order to ensure
that customers are properly serviced
and converted into clients.

# *Funneling Leads*

**2. Managing Leads**

Massive lead generation also requires a lead management system that can handle a massive amount of leads. Having a process in place to make sure that leads are properly followed up and converted is the key to turning leads into business. Many agents use their contact management software to guide their follow-up after they manually enter their leads into their database. But for Dave and Lisa Therrien of The Therrien Group in Crofton, Maryland, the fact that TP 7i is web-based adds another dimension to their lead management system.

Since The Therrien Group receives many leads from their website www.DaveandLisa.com, the Therriens use TP 7i's website lead capture integration to automate the entry of those leads from their site into their database. "With our website's IDX property search solution, consumers submit their contact information to receive updates on homes for sale in our geographic area," Dave explains, "and that information is automatically sent to our database from our site. TP 7i then creates contact records for those leads."

And their database also automatically starts the follow-up process for the Therriens. "Once a lead comes into our database from our website, TP 7i automatically launches the lead on our internet lead action plan," says Dave. Dave and Lisa then use the Lead manager feature to make sure that their team completes the plan activities to properly follow up on the lead. "That has allowed us to greatly reduce the processing time per lead and streamline our lead management system."

Contact management really will help you run a more effective business—just ask Dave and Lisa.

Funneling leads means channeling leads from all of your various lead generation sources through a single point of entry into the systems of your business. This not only avoids confusion and mishandling of leads, but it is the most effective way to then assign, source, and track your leads, as well. It is also the most effective method of lead management in terms of holding you or your team accountable for lead follow-up and conversion.

# *Funneling Leads*

Funneling leads allows you to:

1. Determine which lead generation sources are bringing in the leads

2. Determine which lead generation sources are more likely to yield leads that convert to business

3. Track whether or not leads are being followed up on

4. Track conversion rates

5. Reward referral sources

If you have a KW Agent Website, a personal website, or subscribe to an Interactive Voice Response System (select providers), you can choose to have your leads directly funneled into your TP 7i account. This feature not only creates a new contact record automatically, but can be combined with the **Auto apply plans** feature of TP 7i to automatically launch these leads on any action plan you choose, including an all email drip campaign (which can be automated, as well) or immediate reminders to team members for quick follow-up.

## Unity in Marketing

One of the implications of funneling is that all of your marketing must feature one email address, one website, and one phone number (with the exception of IVR numbers). Some of the marketing items that will need to feature the same contact information are:

1. Signs

2. Flyers

3. Ads

4. Direct mail pieces

5. Promotional items

6. Business cards (for all team members)

7. Letters and email signatures (for all team members)

8. Website(s)

**NOTE:** *Team members should market and prospect to your database using the team's email address and telephone number.*

*"We have our website and IVR leads fed directly into the **Leads Manager**. It is constantly updating our database with new prospects throughout the day."*

*MARY HARKER*
*THE HARKER FIVE-STAR TEAM*
*DALLAS, TX*

# *Funneling Leads*

## Phones

Anytime a lead comes into your business, it should be entered into your database. The *MREA Operations Manual* has several forms, such as the Buyer Interview and Daily Lead Log, to use in your phone conversations with new leads to capture their pertinent information for later entry into TP 7i.

## Email

As discussed earlier, it is a good idea to use TP 7i's email client to send and receive business email. TP 7i automatically stores any emails you send in the contact's record, and it allows you to attach any incoming emails to the record, so you can quickly check past correspondence.

## Websites

With lead capturing technology, you can turn your website into a lead generation tool. TP 7i has prefabricated forms that you can place on your website. Consumers who go to your site can click an inquiry button (e.g., "Click here to request more information about buying a home") and fill out the inquiry form with their pertinent information.

When they do, the form is sent to your TP 7i account, and a new contact record is automatically created for the lead. In addition to any contact information they submitted, the contact record will also show **Contact types** of **Buyer**, **Seller**, or both depending on what they selected on the form. And any comments they submitted will be stored in the **Contact notes** field. These new **Leads** will then appear in **Today's business**.

*"We use the webpage lead capture form on our websites. Once a prospect enters their information into the form, the lead automatically shows up in TOP PRODUCER for us to follow-up and convert."*

*BRUCE HARDIE*
*THE HARDIE GROUP*
*SPOKANE, WA*

### *How to create a website lead inquiry form*

1.  In the top toolbar, click on **Setup**>**My lead inquiry form**.

2.  In the left-hand navigation, choose **Create new**.

3.  In the **Create lead inquiry form – select page layout** screen, choose the **Page layout** you wish to be displayed for your customers.

## *Funneling Leads*

4.   Choose the **Source** that you wish any leads from the form to be stored
     as in the contact record.  For example, if you are using the form as a
     buyer inquiry form, you may choose to create a "Website Buyer Inquiry"
     source.

5.   **Inquiry form** – choose the specific form you wish to use by clicking on
     the pick-box.  If you wish to create a new form, click Modify list.  Enter
     the name of the form and click **OK**.  Click **OK**.

6.    Next

7.   In the **Create lead inquiry form – agent picture and company logo**
     screen, you will choose the picture and logo that appears on your lead
     inquiry form.  From the **Location of agent picture** drop-down menu,
     choose where on the form you would like your picture to be placed.

8.   **Agent picture –** the picture shown in the preview pane is the picture
     that you set up as your photo in your personal record.  If you wish to use
     another photo for the inquiry form, click **Add** and browse your
     computer for the appropriate file.  The photo should appear in the
     preview pane.

     **NOTE:** *You may only upload .jpg format files.*

9.   **Company logo –** the logo shown in the preview pane is the logo that
     you set up as your company logo in your personal record.  If you wish to
     use another logo for the inquiry form, click **Add** and browse your
     computer for the appropriate file.  The logo should appear in the preview
     pane.

10.   Next

11.  In the **Create lead inquiry form – customize** screen, you can choose
     to **Use the TOP PRODUCER background** or customize the
     background to match the branded look of your website.

     **NOTE:** *It is recommended that you customize the form to look like your
     website.  Not only is this a branding consistency issue, but if
     the form looks like something that doesn't fit in with your site,
     consumers may be less likely to fill it out.*

12.  To uncheck the **Use the TOP PRODUCER background** box, click
     on it.

     Select the colors you want to use for **text**, **background**, and **heading**.
     You will also need to select the **font style**, **text size**, and **header text
     size**.  When you are finished, click **Preview my lead inquiry form now**
     to see the form.

13.   Finish

*(continued on the next page)*

# *Funneling Leads*

## *How to funnel website leads*

After you have created a form, you can place it on your website:

**NOTE:** *KW Agent Websites are already configured to deliver leads directly to TP 7i. For more information on setting up your KW Agent Websites to funnel leads into TP 7i go to* <u>http://support.kw.com</u>.

*1.* In the top toolbar, click on **Setup**>**My lead inquiry form**.

*2.* In the **My lead inquiry form** screen, select the lead inquiry form you wish to use and click **Get URL** from the left-hand navigation.

*3.* In the **Get lead inquiry form address** pop-up, follow the directions to copy the URL. Click **OK**. Paste the link in the appropriate place on your website or have your webmaster place it on your site for you.

*4.* You can set up an action plan to automatically apply to any leads that are funneled into TP 7i from your website (see pg. 96).

## Interactive Voice Response Systems

One of the best technologies for marketing your listings is an Interactive Voice Response (IVR) system. These telephone systems allow you to record detailed voice descriptions about all of your listings that potential customers can listen to at any time.

The system assigns each listing a unique identifying phone number or extension that you then place on all of your marketing materials for the property (sign riders, flyers, websites, etc.). When customers call to listen to the information about the property, their phone number is captured by the system and sent to you via a pager. The system not only identifies the phone number of the lead, but it also tells you what property they originally called about.

Several IVR systems are capable of funneling callers' contact information into TP 7i. TP 7i will automatically create a new contact record for the caller, and add it to **Leads** in **Today's business** (contact TOP PRODUCER Support at 1-866-337-2658 or your IVR provider for more information on setting up your IVR system to funnel leads into TP 7i).

# *Assigning Leads*

For Usha Patel, of The Patel Team, communication can be a big challenge to running a successful team. "Prior to adopting TP 7i, our team's production was restricted by our inability to have up-to-date scheduling, client, and listing information available to all team members at all times," says Usha.

That's why they are so pleased with the web-based and Palm features of TP 7i. It gives them the ability to assign activities to team members and keep track of who's doing what, wherever they are. "Since adopting TP 7i's Internet-based system, each of us now has everything we need at our fingertips via Palm devices. Tasks are disseminated throughout the team at the touch of a button over the net," Usha explains.

Comparing the way they do business now to the way they used to, Usha says, "Top Producer 7i has revolutionized The Patel Team's ability to share information." And although technology is often maligned as a barrier to personal relationships, The Patel Team has found that their database gives them the ability to build relationships on a massive level. "With contact management software," Usha says, "our relationship-based business has launched into the information age and broken through another ceiling of achievement."

Contact management really works for teams—just ask The Patel Team.

Once you have leads funneling in, you must have systems in place to effectively convert those leads into business. How those leads are followed up on will depend upon how you assign:

1.    New leads to the proper group in your database (see pg. 38)

2.    New leads to the appropriate action plan (see pg. 56)

**And if you have a team…**

3.    Action plan activities to team members (see pg. 54)

In addition to the previously mentioned ways of assigning leads in TP 7i, you can also automate the way that some leads are assigned to an action plan. When TP 7i is set up to funnel leads into your database automatically through your website or IVR system, you will see **Leads** show up on the **Today's business** screen. Any lead that is automatically funneled into TP 7i, can also be automatically assigned to an action plan of your choosing.

# Assigning Leads

*How to auto apply action plans to automated leads*

To place leads funneled to TP 7i from your website or IVR on automated plans:

1.  In the top toolbar, select **Schedule**>**Today's business**>**Summary**.

2.  Click **Leads**.

3.  In the left-hand navigation, click **Auto apply plans setup**.

4.  In the left-hand navigation, click **Add rule**.  Any leads that are automatically funneled into TP 7i and match the **Source**(s) and **Inquiry form**(s) you select will be placed on the plan that you select for the rule.

5.  🔵 Next

6.  Choose the **Contact type**(s) for which you wish to set up the rule. 🔵 Next

7.  Under **Lead ownership type** select **Agent generated**. 🔵 Next

8.  Under **Action plan**, click on the plan you wish to apply to the lead. Click **Add**. 🔵 Next

9.  In the **Add auto apply plan rule – selection summary** screen, make sure that the rule is set up to your liking. 🔵 Next

10. Enter an **auto apply plan rule name** in the box. ✅ Finish
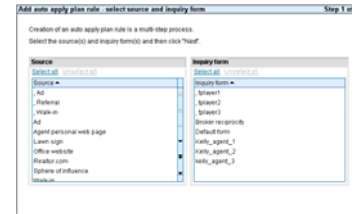
# *Sourcing Leads*

You will be lead generating through a variety of methods.  Without the ability to determine which of those methods are bringing in leads—and how many leads each method is yielding—your lead generation activities would be the equivalent of playing darts blindfolded.  Not only would you not know your score, but you wouldn't even know if you had hit the board at all.

Determining which sources are worth the team's resources—and which sources are not bringing in the necessary leads to justify their cost—begins with knowing what your lead generation sources are.  For every lead source in your business, you should create a **Source** in TP 7i and record the source of every lead that you enter into your database.

You will deal with leads from a variety of sources, including:

1. Past client referral

2. Agent referral

3. Network, Advocate, Core Advocate, or Allied Resource referral

4. Sign calls

5. IVR calls

6. Website

7. Magazine ad calls

8. Newspaper ad calls

9. Newsletter

10. Past Client (repeat business)

11. Just Sold cards

12. Sponsorship (little league)

> *"The more efficient you get with your database, the more business you'll generate from it. There's no question about that."*
>
> *GARY UBALDINI*
> *THE GARY AND NIKKI TEAM*
> *PALM HARBOR, FL*

**NOTE:** *If you advertise in several different magazines or have more that one website, make sure that you are giving each one its own source (e.g., "Premiere Homes," "Tampa Bay Fine Living," etc.).  This will enable you to be very specific about where your leads are coming from.*

## *Sourcing Leads*
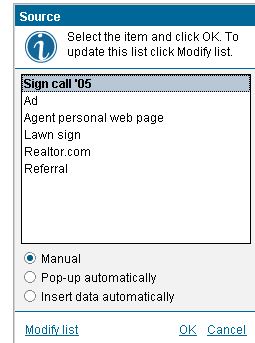
### *How to create a source*

In order to create a new **Source**, TP 7i requires that you open a contact record:

1. In the top toolbar, select **Contacts**>**Add new contact**

2. Click on the pick-box next to the **Source** field.

3. In the **Source** prompt, click **Modify list**.

4. Enter the name of the **Source**.

   **NOTE:** *If you want to track your leads per source annually, you can label sources with the year (e.g., Website '05, Flyer '05, etc.).*

5. Click **OK**.  Click **OK**.  ✖ **Cancel**

## Creating Referrals

| Truth |
| :---: |
| **To get to and remain at the millionaire level, your chief concern has to be filling your database with advocates who will help you grow your business.** |

As discussed earlier, your contacts should be grouped not only in terms of their relation to you, but in terms of their relevance to your business.  The inner circles of your database will consist of those people that you know who are willing to refer you to their friends and family.

In order to create advocacy, top agents know that all marketing and prospecting activities should include a request for referral business.  Anytime you speak with, email, write a note, or send a marketing piece to someone in your database, your strategy for turning contacts into advocates is clear:

1. Educate

2. Ask

3. Reward

| Truth |
| :---: |
| **The intent of your marketing is to consistently "touch" your target audience to create, not only business, but *advocacy*, as well.** |

# *Sourcing Leads*

## *How to create a referral*



Whenever you send or receive a referral (regardless of whether or not a referral is from an agent or a contact), you will want to list the referral's **Source** as **Referral** in their contact record:

1. In the top toolbar, select **Contacts>Leads**.

   **NOTE:** *It is better to use* ***Leads*** *to add new contacts rather than* ***Add new contact****. **Leads** forces you to choose the source for the lead. Only leads that have sources entered will appear in the* ***Lead manager****.

2. Click **Add new lead**.

3. In the **Source** prompt, choose **Referral** and click **OK**.

4. The **Change lead to referral?** prompt will appear. Click **Yes**.

5. The **Set referral source** prompt will appear. Check **Do not remind me again** to prevent the prompt in the future. Click **OK**.

6. When you are finished creating the contact's record, ✅ **OK**

7. In the **New referral – select referral direction** screen, choose whether the referral was **Sent** to another agent or **Received** by you (from either an agent or a contact). 🔵 **Next**

8. In the **New referral – search…** screen –

   a. If the contact is in your database:

      i. Select whether you wish to search for the contact's record by their **Name** or **Address**.

      ii. Enter the appropriate search information in the fields provided.

      iii. Select the contact's name from the search list. ✅ **Finish**

   **Or**

   b. If the contact is not in your database:

      i. Check the **Don't search. I will create a new contact.** box by clicking on it. 🔵 **Next**

      ii. Create the contact's record. ✅ **OK**

9. In the **Referral details** screen, fill in any appropriate information. ❌ **Close**

   **NOTE:** *If the lead is a referral from an agent, make sure to enter the* ***Referral fee****.*

10. After you have set up a referral, you will want to launch a referral action plan to properly reward the referring contact (see pg. 105)

# *Tracking Leads*

Tracking a lead begins the moment the lead hits your system. You will track leads as they enter your business, are sourced, are assigned, and are followed-up. With TP 7i, you can create several reports using the Advanced search tab (under **Search>Search for contacts**) to track many aspects of your business, including:

1. Lead follow-up

2. Leads per source

3. Leads to closed business

4. Referral reward process

*Tip!* – *New contacts will only show up in the* ***Lead manager*** *if they are assigned a* ***Source*** *in their contact record.*

D ave Herries, of The RealtyColorado Team, understands just how important a role technology can play in an agent's business. As a founding member of eAgentC's Associate Technology Council, Dave has always tried to stay on the cutting edge of technology in real estate.

It's no surprise then that he has been a longtime advocate of using contact management software. "A contact management system is absolutely essential for a Realtor that wants to build a business that 'Nets a Million.'" And after using a CMS for years to help *create* business, Dave recently began using his CMS to better *manage* his business. "We decided that we needed to have a system that would track our business," he explains.

Through his CMS, Dave has instituted several new measures to track his team's production numbers. "Today we can print a report for each sales person that tracks their sales activity from lead to contact, contact to appointment, appointment to listing, and listing to contract," Dave says. "This is accountability at its very best."

Contact management works—to both *create* and *manage* business. Just ask Dave.

# *Tracking Leads*

## Lead Follow-Up

The **Lead manager** feature of TP 7i is a real-time snapshot of how quickly
your team is responding to new leads. Whether leads are entered manually or
funneled from a website or an IVR system, the Lead manager gives you a quick
overview of what new leads have entered your business, who has followed up
with them and how, and what the results of the follow-up were. The status of
leads (e.g., new, followed-up, listed, etc.) in the Lead manager change
automatically as various activities are completed within TP 7i. If you are
running a team, you should be checking this invaluable tool often to ensure that
your leads are properly followed up on and converted by your team members.

### *How to track lead follow-up*

Whenever you or your team complete activities and create a listing or a closing
for a lead in TP 7i, the status of the lead is changed in the lead manager. To
track the status of a lead:

1. In the top toolbar, select **Schedule**>**Today's business**>**Summary**.

2. Click **Leads**.

3. In the **Lead manager**, select the type of leads you wish to view from the
   **Only display leads…** drop-down menu.

4. The **Status** column shows where the lead is in the process of conversion
   from lead to closed business.

   a. **New –** a lead's status will be marked **New** when it is entered into the
      database but nothing has been done in TP 7i to convert the lead.

   b. **Followed up –** a lead will change to **Followed up** after the first
      activity in TP 7i has been marked done.

   c. **Listing –** a seller lead will change to **Listing** once a listing file is
      created in TP 7i.

   d. **Listing-closing –** a seller lead will change to **Listing-closing** when
      a closing file has been created in TP 7i.

   e. **Closing –** a buyer lead will go directly from **Followed up** to **Closing**
      when a closing file has been created in TP 7i.

5. Double-click on any lead to view the contact record. Make sure that the
   lead is on the appropriate **Action plan** (lead generation, listing or
   closing) and that the **Contact notes** are current and correct. You will
   also want to **View history** to see what has been done to convert and
   service the client.

*(continued on the next page)*

> *"Our systems track
> what each team
> member does to
> follow-up with their
> leads. This is the
> only way we can
> effectively measure
> their effectiveness
> and keep them
> accountable to our
> team's goals and
> standards."*
>
> *MIMI PATRICK*
> *THE GARY AND NIKKI TEAM*
> *PALM HARBOR, FL*

## *Tracking Leads*

## Leads per Source

In order to hold your marketing dollars accountable, you should be analyzing your cost per lead. TP 7i gives you the ability to track the crucial piece of that puzzle: leads per source. Knowing how many leads each of your sources generates, you can easily divide how many leads the source generated into how much you spent on the marketing source (for forms to track your marketing expenses, see the *MREA Operations Manual*).

**NOTE:** *If you want to track your leads per source annually, you can label your **Sources** with the year (e.g., Website '05, Sign call '05, etc.).*

### *How to track leads per source*



1. In the top toolbar, click **Search>Search for contacts**.

2. In the **Search contacts** screen, select the **Advanced search** tab.

3. In the **Search criteria** list, under the **Primary person**, scroll to and click on **Source**.

4. In the **Search for** list, double-click on the source for which you wish to see the total leads.

5.    ● **Start search**

6. In the **Search results** screen, click on **Search results total** in the lower right side of the screen. The total number of leads in your database that were generated from that source will be calculated for you.

7. Select ● **Previous** to go back and repeat this process for each of your lead sources.

# Tracking Leads

## Leads to Closed Business

In addition to knowing how many leads each source is generating for your business, you will also want to know how many closed sales each source is bringing in.  If you track your commissions earned for your closings in TP 7i, you can total the amount of commissions you earned from sales from any given source and compare that to your expenditures on the source to yield your ROI for the source. In order, to properly track this, you must:

**NOTE:** *If you want to track your closed business per source annually, you can label your* **Sources** *with the year (e.g., Website '05, Sign call '05, etc.).  You should also be tracking your total costs spent on each marketing source (see* MREA Operations Manual *for tracking forms).*

### How to track leads to closed business



1.  In the top toolbar, select **Search>Search for Contacts**.

2.  Click on the **Advances search** tab.

3.  In the **Search criteria** field, select **Source** (under **Primary Person**).

4.  In the **Search for** field, select the **Source** you wish to track.

5.  Click ➡ next to the **Perform search based on:** field.

6.  Select **Listings/Closings** from the **Search category** drop-down menu at the top left of the screen.

7.  Select **Closing Status** (under **Closing**) in the **Search criteria** field.

8.  In the **Search for field**, select **Closed/Paid** and **Closed/Paid Transferred**.

9.  Click ➡ next to the **Perform search based on:** field.

10. Select **Closing Date** in the **Search criteria** field.

11. From the **Return records that** drop-down menu, select the appropriate option.

12. Click ➡ next to the **Perform search based on:** field.

13. 🔵 **Start search**

14. Click on **Search results total** in the bottom right hand corner to display number of contacts generated by the source.
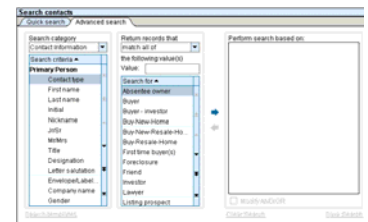
*(continued on the next page)*

# Tracking Leads

## Tracking Referrals

To be systematic in your approach to rewarding a referral, there are five things to keep in mind:

1. Your rule of thumb should be: treat the referral source even better than the referral.

2. Show your appreciation at every stage of the transaction: when you take the referral call, when you meet with the referral, when you do business with the referral, and when the transaction is complete. The important thing is that you reward them right away, so they repeat the behavior soon.

3. Reward the right behavior. Your contacts aren't in the business of screening clients before they refer them to you—the act of referral is what should be meaningfully rewarded. That is what you want them to do again and again.

4. Recognition and appreciation are as important as gifts. You don't have to buy the referral relationship—a simple Thank You note goes a long way.

5. Reciprocate when possible. Be a networker, and find ways to help them with their business or work. Ultimately, sending them referrals will generate referrals from them.

## Referral Manager

The **Referral manager** manages more than just referrals from other agents. This powerful feature of TP 7i tracks all of your Advocates, Core Advocates, and other types of referral business. You can quickly view specific details about each referral, including who was referred, when it closed, and how much commission was earned. The Referral manager also has integrate referral action plans to remind you to keep your referring parties updated and track any referral fees that might need to be paid.

The Referral manager gives you an ongoing overview of all referrals you have sent and received. At any time you can quickly see where referrals are in their transactions. This allows you to reward them at every step:

1. The Interview
2. The Appointment
3. The Contract
4. The Closing

*"We work a large number of referrals from agents around the country. The referral manager in TOP PRODUCER keeps us organized by reminding us to follow-up and by keeping track of referral fees."*

*DAN HARKER*
*THE HARKER FIVE-STAR TEAM*
*DALLAS, TX*

# *Tracking Leads*

To remind you to reward at these various stages, you should launch any referring contact on a referral action plan. The plan will serve as a reminder to check on the progress of the referrals transaction. When their status hits any of the above mentioned stages, you know it's time to reward.

### *How to launch a referral action plan*



1.  In the top toolbar, click **Contacts**>**Referrals**.

2.  In the **Referral Manager**, search your referral by choosing from the **Search by** and **Referral direction** drop-down menus. Click **Start search**.

3.  Select the appropriate referral. In the left-hand navigation, click **View or edit referred by/to details**.

4.  Click **Action plan**.

5.  Click **Select plan** in the left-hand navigation.

6.  Select a referral action plan from the **Available plans**. There are referral action plans for both sent and received referrals. Click **Add**.

7.  In the **Select plan start date** prompt, select the **Start date**. Click **OK**.

8.  Click **OK**.

9.  **Close**. The activities for the plan will come due in Today's business.

**NOTE:** *In addition to rewarding them as you would any referring contact, referring agents are also entitled to a referral fee should their referral complete a transaction with you. This should be set as a reminder in your referral action plan for referring agents.*

### *How to track and reward for referrals*



In addition to regularly updating referring contacts as to the progress of their referrals, anytime you enter a lead or change the status (i.e., create a listing or buyers presentation, create a closing, or close the transaction) of a lead, check the lead's **Source**. If they are a referral to your business:

1.  In the top toolbar, click **Contacts**>**Referrals**.

2.  In the **Referral Manager**, use the **Search by** drop-down menu to find the referral.

3.  Double-click on the name of the referral that you received.

4.  Under **Referred by**, click on the name of the referring person. Schedule a referral reward (Thank you note, phone call, gift, etc.) by clicking on **Schedule follow-up** in the left-hand navigation (see pg. 85).
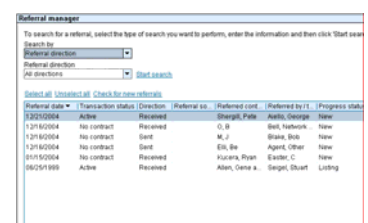
## Tracking Leads

In the **Assigned to** field, make sure that the reward activity is assigned to the proper team member. ✅ **Finish**

Click ❌ **Close** to close the referring party's contact record.

5. In the **Referral details** screen, make a note of the referral reward in the **Referral notes** field (e.g., "Sent Interview referral gift.").

6. ❌ **Close**

**NOTE:** *The Referral manager also allows you to easily track your top referral sources by clicking* **View top sources**. *In the Top sources screen, you will see a list of your referring contacts. From the* **Referral direction** *drop-down menu, you can select which types of referrals you wish to view,* **Sent**, **Received**, *or* **All**. *Click* **Start search**.

*You can also click* **View referral business summary** *in the left-hand navigation in the Referral manager. This allows you to track your referral numbers by* **Month** *and* **Year**.

## Other Tracking Reports

TP 7i features a very robust search tool (**Search>Search for contacts** in the top toolbar). Under the **Advanced search** tab, you can search your database to create all of the reports mentioned above and many more to help keep your business and your team accountable. TP 7i also allows you to save your searches as a template, so you don't have to recreate the same search if you will be using it repeatedly.

### *How to save and use custom searches*



After you have performed a search, you can save the search for your convenience the next time you want to perform a search:

1. In the **Search results** screen, click **Save search template** in the left-hand navigation.

2. In the **Save search template** prompt, enter the **Search template name** and click **OK**.

3. To access your search templates in the future, in the **Search contacts** screen under the **Quick search** tab, click on **Search templates**.

4. In the **Search for** drop-down menu, select the search you wish to perform. 🔵 **Start search**
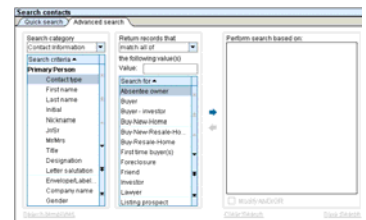
YOUR BUSINESS IS YOUR DATABASE

# *Chapter 5:*
# *Converting Leads*

## Objectives:

**[1]** *Schedule the listing appointment and prepare the listing presentation packet.*

**[2]** *Schedule the buyer consultation and prepare the buyer consultation packet.*

# *Consulting Sellers*

Ask Mel and Gary Gentry, of The Gentry Group, about converting clients, and they'll tell you, "It's all about being prepared when you walk into the appointment." Part of the Gentry's preparation when they get a call for a listing appointment is to gather all of the pertinent information from the seller over the phone and enter it into their contact management software. "That way, when our Listing Specialist walks into an appointment, they have all of the seller's information, and they're already aware of the potential issues," Mel explains.

On one particular occasion though, just having the seller's information in their database was all it took for the Gentry's to get the listing. "A seller who had bought a house from us years ago called us to set up a listing appointment," recalls Mel. "Since we still had all of her information in our database, we were able to ask, 'How's *so and so*?'

"The woman was shocked. She told us later, that she had planned on talking to a few agents before deciding who to go with, but she was so impressed that we remembered her that she signed with us without talking to anyone else."

Contact management helps, not just to generate leads, but to convert them, as well—just ask Mel.

After you or your team has converted a lead to an appointment for a listing consultation, you will need to schedule the appointment (see pg. 56) in TP 7i and prepare for it.

As part of your preparation, you will need to create a listing packet. In the Communication library, you will find a large selection of individual marketing and consultation templates that can be combined to create a variety of listing consultation packets, including robust, detailed CMA's, pre-listing packets, and seller books. Keller Williams Realty has also uploaded listing presentation materials, which are based on the best practices from the top agents in KWR. These consultation packets can be printed, saved to a file, or hosted on the Internet and sent as a hyperlink within an email.

*"TOP PRODUCER has definitely paid for itself!"*

*DEBBIE FONTENETTE*
*AUSTIN, TX*

# Consulting Sellers

If you purchase a Top Connector 7i subscription with TP 7i, you can create a CMA from your MLS directly through TP 7i (for more information on using Top Connector 7i, in the top toolbar, select **Help**>**Download user guides**. In the **Download User Guides** screen, select **Top Connector 7i**.). Or you can print all of the various forms for your listing packet from TP 7i and create your CMA directly through your MLS software.

## *How to prepare the listing presentation packet*

When you are ready to create a listing presentation packet:

1.   In the top toolbar, click **Contacts**>**Address book**.

2.   Find the contact's name by clicking on the first letter of their last name beside the address book and/or using the arrows to scroll.

3.   Click on the contact's name.

4.   In the left-hand navigation, click **Create CMA/Buyer presentation**.

5.   If the seller has more than one property (i.e., investment or other properties), you will be taken to the **Select property** screen. Select the property for which you wish to create the CMA. ⊙ **Next**

6.   In the **Create CMA – Select template** screen, select the appropriate **Template category** from the drop-down menu.

7.   Double-click on the **Template name** you wish to use.
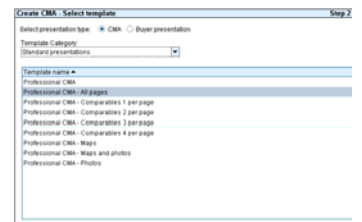
   If you are not using Top Connector 7i to pull MLS data into TP 7i, skip to step number 11 on the next page. If you are using Top Connector 7i, proceed to step number 8.

   **NOTE:** *If you have not yet set up Top Connector 7i, click on **MLS import** from the left-hand navigation, and follow the instructions. For help on using Top Connector 7i, in the top toolbar, select **Help**>**Download user guides**. In the **Download User Guides** screen, download the appropriate guide.*

8.   In the **Create CMA – Property Search** screen, enter the search criteria for your comparables. ⊙ **Next** . Top Connector 7i will then retrieve the data from your MLS.

# Consulting Sellers

**NOTE:** *If you prefer to search for comparables using your MLS software, you can choose* **Search by MLS numbers***, then enter the numbers into the* **MLS number** *field (separated by a comma).* ⓒ Next

9.  From the **View** drop-down menu, choose which homes you wish to appear in the list. Clicking on **Column settings** allows you to choose what property information you view and in what order you view it on the screen. TP 7i will remember your column settings for future CMA's.

10. Next to each property in the search results list, click the check box if you would like to include the property in your CMA. ✅ Make CMA

11. In the **CMA for …** screen, you can click and drag properties in the **Comparable properties** list to determine their order in the presentation, You can also **Preview maps** and **Configure charts** in the presentation. Click **View or edit the presentation** in the left-hand navigation to make any changes, such as **Organize pages**, **Customize stationery**, etc.

    **NOTE:** *You can edit property descriptions for any of your comparables by double-clicking on the property in the* **Comparable property** *list.* ✅ OK

12. When the presentation is ready, click **Print**, **Send**, or **Save as file**:

    a.  **Print –** choose which pages of the presentation you wish to print (hold down the **Ctrl** key to select multiple pages) and select the correct printer settings. Click **OK**.

    b.  **Send –** choose the file **Size** for the link and choose which pages of the presentation you wish to send (hold down the **Ctrl** key to select multiple pages). Click **OK**. The email will be automatically created with the link to the presentation. Make any necessary changes to the email template (see pg. 78). ⓒ Next · ✉ Send ·

    c.  **Save as file –** choose the file **Size** for the attachment and choose which pages of the presentation you wish to send (hold down the **Ctrl** key to select multiple pages). Click **OK**. Save the file to your computer or disk.

13. ❌ Close

> *"Top Connector makes it easy for us to prepare a listing presentation. We automatically download the local MLS comps, create a quick seller net sheet, and produce a customized presentation with maps, that doesn't look like the typical MLS printout."*
>
> *BRUCE HARDIE*
> *THE HARDIE GROUP*
> *SPOKANE, WA*

# *Consulting Buyers*



3.
Converting
Leads

After you or your team has converted a lead to an appointment for a buyer consultation, you will need to schedule the appointment (see pg. 56) in TP 7i and prepare for it.

As part of your preparation, you will need to create a buyer consultation packet. In the Communication library, you will find a large selection of individual marketing and consultation templates that can be combined to create a variety of buyer consultation packets, including robust, detailed CMA's and buyer books. Keller Williams Realty has also uploaded buyer consultation materials, which are based on the best practices from the top agents in KWR. These consultation packets can be printed, saved to a file, or hosted on the Internet and sent as a hyperlink within an email.

As with listing presentations, you can create pull property information for your buyers from your MLS directly through TP 7i (for more information on using Top Connector 7i, in the top toolbar, select **Help**>**Download user guides**. In the **Download User Guides** screen, select **Top Connector 7i**.). Or you can print all of the various forms for your buyer consultation packet from TP 7i and printout a list of properties directly through your MLS software.

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*How to prepare the buyer consultation packet*

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When you are ready to create a buyer consultation packet:

1. In the top toolbar, click **Contacts**>**Address book**.

2. Find the contact's name by clicking on the first letter of their last name beside the address book and/or using the arrows to scroll.

3. Click on the contact's name.

4. In the left-hand navigation, click on **Create CMA/Buyer presentation**.

5. In the new window, select **Buyer presentation** next to **Select presentation type**.

6. Select the **Template category** from the drop-down menu.

7. Double-click on the **Template name** you wish to use.

    If you are not using Top Connector 7i to pull MLS data into TP 7i, skip to step number 11 on the next page. If you are using Top Connector 7i, proceed to step number 8.
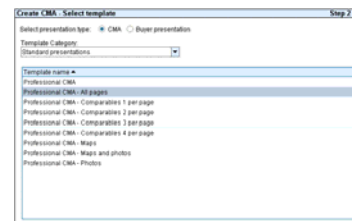
## *Consulting Buyers*

**NOTE:** *If you have not yet set up Top Connector 7i, click on* **MLS import** *from the left-hand navigation, and follow the instructions. For help on using Top Connector 7i, in the top toolbar, select* **Help>Download user guides***. In the* **Download User Guides** *screen, download the appropriate guide.*

8. In the **Create Buyer Presentation – Property Search** screen, enter the search criteria for the type of home that the buyer is looking for. 🔵 **Next**

**NOTE:** *If you prefer to search for homes using your MLS software, you can choose* **Search by MLS numbers***, then enter the numbers into the* **MLS number** *field (separated by a comma). When you have entered the numbers, click* **Next***.*

9. From the **View** drop-down menu, choose which homes you wish to appear in the list. Clicking on **Column settings** allows you to choose what property information will appear in the CMA and in what order you view it on the screen. TP 7i will remember your column settings for future CMA's.

10. Next to each property in the search results list, click the check box to include them in your buyer consultation materials. ✅ **Make buyer presentation**

11. In the **Buyer Presentation for …** screen, you can click and drag properties in the **Comparable properties** list to determine their order in the presentation. You can also **Preview maps** and **Configure charts** in the presentation. Click **View or edit the presentation** in the left-hand navigation to make any changes, such as **Organize pages**, **Customize stationery**, etc.

**NOTE:** *You can edit property descriptions for any of your comparables by double-clicking on the property in the* **Comparable property** *list.* ✅ **OK**

12. When the presentation is ready, click **Print**, **Send**, or **Save as file**:

   a. **Print –** choose which pages of the presentation you wish to print (hold down the **Ctrl** key to select multiple pages) and select the correct printer settings. Click **OK**.

   b. **Send –** choose the file **Size** for the link choose which pages of the presentation you wish to send (hold down the **Ctrl** key to select multiple pages). Click **OK**. The email will be automatically created with the link to the presentation. Make any necessary changes to the email template (see pg. 78). 🔵 **Next** 🔵 **Send** .

*"Once I previewed TOP PRODUCER, I immediately recognized it as the perfect automated solution."*

*CYNDI CUMMINGS*
*LAKE TRAVIS, TX*

## *Consulting Buyers*

       *c.*   **Save as file –** choose the file **Size** for the attachment and choose which pages of the presentation you wish to send (hold down the **Ctrl** key to select multiple pages).  Click **OK**.  Save the file to your computer or disk.

13.    ❌ Close

YOUR BUSINESS IS YOUR DATABASE

# *Chapter 6: Servicing Clients*

## Objectives:

**[1]** *Service listings using listing action plans and listing service reports.*

**[2]** *Service buyers using buyer action plans or the buyer service checklist.*

# *Servicing Sellers*

A sk Debby Lewis, of the Lewis Home Team, how they use their database, and she'll tell you, "Our overall goal is to give our clients the kind of service that *we* would love to get, but rarely do. The key to doing that is being organized and consistent." And that's how Debby leverages her database. "With our database, we have been able to keep up with all of the phone, e-mail, and personal changes in our clients' lives."

Focusing on their database has paid off in big ways for the Lewis Home Team. "Because we regularly stay in touch with our clients, we have sold some of the same homes 2 and 3 times," says Debby. And that's just the kind of business that Debby loves. "Repeat and referral business is so much more satisfying to us."

Although they had to rebuild their database from scratch since moving from Dallas to Austin, they were diligent about adding everyone that they sold, listed, and did business with. And that diligence shows. Today the Lewis Home Team's database accounts for 95% of their business.

Contact management really works—not just to build business, but to build the kind of business you want. Just ask Debby.

| Truth |
|---|
| **The primary reason many agents market a listing is to have it sell for the best price in the right time frame.** |
| The marketing of listings should be seen as a lead generation tool for more listings. |

Your listing marketing system needs to protect you from your own "get-the-house-sold-as-quickly-as-possible" instincts. If you haven't already, implement the *MREA* Basic Fourteen-Step Marketing Plan for Listings on every single listing. And make sure that you and your team follow it for *every house you list*, regardless of the market. Even if your marketing generates inquiries after the sale of the house, those leads can be captured and redirected to other listings.

## Servicing Sellers

### Basic Fourteen-Step Marketing Plan for Listings

Based on the statistics presented in the *MREA*, if you want to have 50 sales in one year, you'll need to develop a lead generation plan that delivers 25 salable and marketable seller listings and then effectively market them to bring in 25 buyers. And if you want to net a million with 320 closed sales, you'll need to generate leads that deliver 160 sellers and 160 buyers. One of the best ways to do this is to follow the Basic Fourteen-Step Marketing Plan for Listings:

1. Staging and Pricing Strategies

2. For Sale Sign, Rider Signs, and Directional Signs

3. Tube or Box with Flyers and Distribution of Flyers in Neighborhood

4. Flyers in House/Home Book/Comment Cards

5. MLS

6. Web Listings with Virtual Tour (strategic placement on your site; include the IVR number for the listing in the property description field)

7. House Featured in "Marketing Vehicle" (calendar, etc.)

8. Open House Program

9. E-mail/Fax/Voice Broadcast (with your web address)

10. Track Showings/Collect Feedback

11. Target Marketing

12. Weekly Seller Updates

13. Property Caravans

14. Creative Marketing Ideas (10K, Cable show, etc.)

*Tip! – You should be using all fourteen steps to market each and every seller listing.*

# Servicing Sellers

## Creating a Listing in TP 7i

The Listing manager feature of TP 7i is designed to help you manage the multitude of tasks and responsibilities that arise during the servicing of a listing. The Listing manager will help you to organize, track, and ultimately communicate your progress to your clients. The core of the listing manager are the detailed listing action plans that feature dated activities to serve as reminders to you and your team in the Today's business feature. As these activities are completed, you can create service reports for your clients to receive timely updates as to the details of your marketing and servicing efforts.

### *How to create a listing*

1.  In the top toolbar, click **Listings**>**Create listings**.

2.  In the **Create listings – search…** screen:

    *a.* **If the seller is in your database:**

        *i.* Select whether you wish to search for the contact record by their **Seller** name or **Address**.

        *ii.* Enter the appropriate search information in the fields provided. **Next**

        *iii.* Select the seller's name from the search list. **Next**

    **Or**

    *b.* **If the seller is not in your database:**

        *i.* Check the **Don't search. I will create a new contact record for this listing.** box by clicking on it. **Next**

        *ii.* Create the seller's contact record. **OK**

3.  If there are *additional* sellers involved in the sale (such as in the case of a divorce), search your database for them and double-click on their name to add them to the listing file. If necessary, you can create a new contact record by clicking **Add new contact**.

4.  **Next**

5.  In the **Create listings – select listing plan(s)** screen, select the plan you wish to apply to the listing.

    To create a new listing plan for this listing, click on **Listing plan library** at the bottom of the screen; for help on creating and editing action plans, see pgs. 55 and 54).

6.  **Finish**

## Servicing Sellers

7.  In the **Listing details for …** screen, enter all of the data for the listing and remember to set the proper **Expiration date** and set an appropriate date for the **Expiration reminder**.

8.  **Activities** tab **–** you can customize and add activities for the listing plan.

9.  **Notes** tab **–** when you create a listing, any information you enter in the **Listing notes** will show up in the **Listing details** screen and the contact record.

10. **Include/Exclude** tab **–** add items from the seller's disclosure that will be included and excluded from the sale of the home.

11. **Flyer information** tab **–** the **Description** and **Flyer text** fields are can be merged into flyers.

12. **Sellers** tab **–** all sellers involved in the sale of the property will be listed here if you attached them when creating the listing.  By clicking **Send email** here, TP 7i will automatically generate an email addressed to all involved sellers.  You can also perform a mail out that will automatically pull contact information into the mailer for all involved sellers.

13. **Scheduled reports –** this displays all listing service reports sent and scheduled to be sent to your sellers (see pg. 123).

14. ⊗ Close

*"Our listing coordinator keeps all of the details in TOP PRODUCER. This makes it easy for our team members to keep updated in real-time on the details of each of our properties."*

*BRUCE HARDIE*
*THE HARDIE GROUP*
*SPOKANE, WA*

**(continued on the next page)**

# Servicing Sellers

## *How to add photos to a listing*



To add photos of a property to the listing file in TP 7i:

1. In the top toolbar, click **Listings**>**Current listings**.

2. In **Current listings**, double-click on the listing to which you wish to add photos.

3. In the left-hand navigation, click **View or add property photos**.

4. When you add photos, use the **Merge code** drop-down menu below the preview pane to select the proper merge code for the photo you are uploading. Be sure to change the merge code each time you upload a different photo.

   **NOTE:** *For each of your listings, if you use the same merge code (e.g., **view_front**) for the same type of photo (e.g., front of the house), you will be able to auto-populate flyers in TP 7i so that the appropriate pictures are in the correct place on the flyer without having to change the merge codes on the flyer for each property.*

5. Click **Add** to upload property photos to TP 7i. In the dialogue box, browse your computer to select the file and click **Open**. You may add multiple photos for each property. To scroll between photos, use **<<Previous** and **Next>>**.

   **NOTE:** *You may only upload .jpg format files.*

6. **⊗ Close**

## Listing Action Plans

TOP PRODUCER has a listing plan called the Listing Services Checklist. Keller Williams Realty has also added a listing plan for our agents to TP 7i based on the *MREA* Basic Fourteen-Step Marketing Plan for Listings. Regardless of which plan you use for your listings, you will want to customize it to your method of servicing your sellers.

After you have launched a listing plan, activities for the listing will come due in the **Today's business** screen under **Listing to-dos**. As part of your daily routine, you should complete any due listing activities. As you complete those activities remember to *mark them done*. TP 7i places any activities that are marked done on a seller report that is emailable, printable, and publishable to the web.

> *"Our action plans set everything in motion in our business."*
>
> *MARTIN BOUMA*
> *THE BOUMA GROUP*
> *ANN ARBOR, MI*
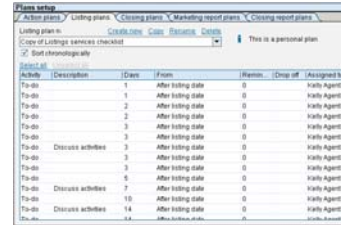
# Servicing Sellers

## How to customize listing action plans



*1.* In the top toolbar, click **Listings**>**Listing plans**.

*2.* Choose the plan you wish to customize from the **Listing plan** drop-down menu.

*3.* You can create, edit, and delete activities in the plans just as with your other action plans (see pg. 54).

*4.* To create a new listing action plan, click **Create new** above the **Listing plan name** drop-down menu (for more information on creating action plans, see pg. 55).

*5.* ⊗ **Close**

## How to execute Listing to-dos



When a listing activity comes due in Today's business:

*1.* In the top toolbar, select **Schedule**>**Today's business**>**Summary**.

*2.* Click on **Listing to-dos**.

*3.* Double-click on the listing activity you wish to complete. For more information on completing various activities, see pg. 67.

*4.* When you are done with an activity, click **Mark done** in the left-hand navigation. A prompt will ask if you wish to mark the activity done; click **Yes**.

*5.* The **Add activity to service report** prompt will appear. Click **Yes** if you wish for your sellers to be able to see that you have performed this activity.

*6.* In the **Add activity for…** prompt, add any details about the activity that you wish the seller to know.

> **NOTE:** *If you add the **Cost** of the activity, you can choose later to hide it from the seller when you send out the service report. While you may want sellers whose homes have expired to know that you have invested money in servicing their listing, you may not want other sellers whose home sold quickly to know how much you spent to earn the commission.*

*7.* ✓ **OK**

*"If you're not aggressively following up with your past clients and customers, somebody else will."*

*RICK BRENKUS*
*THE BRENKUS TEAM*
*LAS VEGAS, NV*

# Servicing Sellers

*How to create a flyer*

The **Flyers** feature of TP 7i offers a variety of publishing shortcuts and delivery options for marketing pieces you create in the Flyer library. To save time, the flyer publishing program in TP 7i incorporates merge codes to auto-populate the text and photos in flyers. In addition to traditional desktop printing, flyers can be saved as .pdf files or published to the Internet and sent to an individual or group as an email.
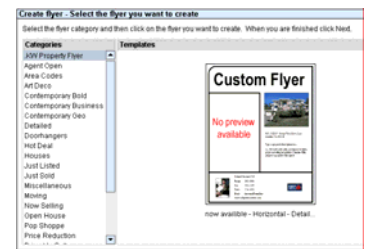
To create property flyers in TP 7i:

1.   In the top toolbar, click **Listings**>**Current listings**.

2.   In **Current listings**, double-click on the listing for which you wish to create a flyer.

3.   In the left-hand navigation, click **Create flyer**.

4.   Scroll through the **Categories** column and click on the category of flyer you want to use.

5.   In the **Templates** column, double-click directly on the template you wish to use.

6.   Make any necessary changes to the flyer (for help on this, see pg. 47).   **Next**

7.   In the **Create flyer – Distribute flyer screen**, select how you want to distribute the flyer.   **Finish**:

    *a.*   **Email this flyer…**

       *i.*   Enter the appropriate email addresses.   **Next**

           **NOTE:** *For help on how to send out mass emails see pg. 79.*

      *ii.*   In the **View or edit email for…** screen, make any necessary changes.

     *iii.*   **Send**

    *b.*   **I want to print this flyer –** set your printer options and click **OK**.

    *c.*   **I want to publish this flyer to the web… –** (see step 8 below).

    *d.*   **I want to finish this flyer…later –** the **Create flyer** prompt will appear telling you your flyer is stored in **My Flyers**, which is under **Flyers** in the top toolbar. Click **OK**.

8.   The flyer will *not* appear under **View history** in the contact record. Instead, a copy of the flyer will be stored in **My Flyers**, which is under **Flyers** in the top toolbar. In **My Flyers**, you can add the flyer to the link library and send it as a link in an email to cut down on the size of the email.

# Servicing Sellers

## Listing Service Reports

TP 7i allows you to publish listing service reports to a password-protected Internet site, where your sellers can log in to see reports on what steps you have taken in servicing their listing and any showing feedback on their property.  You also have the option of emailing or printing and mailing these reports directly to your sellers.

This feedback is a powerful part of your value proposition to sellers.  Not only is this a great tool for getting the listing in a competitive market, it is also a great tool for sellers who overprice their home.  Continuous input from prospective buyers about overpricing can help to bring unrealistic sellers back down to reality about selling their home.

> *"Service reports are a useful tool for enhancing communication with the seller."*
>
> *USHA PATEL*
> *THE PATEL TEAM*
> *ALLENTOWN, PA*

### *How to enter showing feedback*

1.  In the top toolbar, click **Listings**>**Current Listings**.

2.  Double-click on the listing to which you wish to add showing feedback.

3.  In the **Listing details for…** screen, click on the **Service report** tab.

4.  In the left-hand navigation, click on **Add showing**.

5.  In the **Add showing for…** prompt.

6.  Enter the showing agent's information and any remarks from the prospective buyer or agent.

7.  ⊗ **Close**
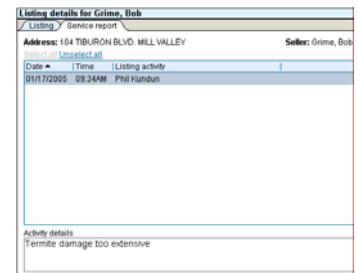
### *How to create a customer website*

1.  In the top toolbar, click **Contacts**>**Address book**.

2.  Find the contact's name by clicking on the first letter of their last name beside the address book and/or using the arrows to scroll.  Double-click on the contact's name.

3.  In the **Contact details for…** screen, click on the **Customer web page** tab near the bottom of the screen.

4.  Click the **Create a customer web page** link.

5.  The **Web page created successfully** prompt will appear.  Click **OK**.

6.  ⊗ **Close**

## Servicing Sellers

*How to create listing service reports*

Before you can publish a service report to the Internet, you must first create a customer website (see above).  To create a service report:

1.  In the top toolbar, click **Listings**>**Current listings**.

2.  Double-click on the listing for which you wish to publish a service report.

3.  In the **Listing details for…** screen, click on the **Service report** tab. You will see all activities that you have completed.

4.  In the left-hand navigation, click **Report**.

5.  In the **Market service report** screen, you can customize your service report.

6.  **Introductory comments** and **Summary remarks** – you can make one time changes to these fields by typing them in the window.  To make permanent changes, click on **Introductory comments** or **Summary remarks**.  In the **Insert comments/remarks** screen create your customized comments/remarks.  ✅ OK

7.  **Report options** – click on the checkboxes to remove and add elements of the report.  You can also click **Set up market data** and **Advanced report options** to customize the report even more.

    **NOTE:** *If you do not wish to **Include cash expenses** in the service report, make sure that the checkbox is unchecked.*

8.  When you are ready to send or save the report, choose the appropriate option from the left-hand navigation or click ✅ **Save and print later**:

    **NOTE:** *The first time you publish a report, choose **Publish**.  It will send the username and password that the seller needs to access the site.  To notify sellers of subsequent reports you will need to click **Publish and send**.*

    a.  **Print –** set your printer options and click **OK**.

    b.  **Publish** (to the Internet)

        i.  An email template addressed to the seller will be automatically created for you.  Make any necessary changes to the email.  ✉ Send

        ii.  A confirmation screen will appear with the URL to the published page.  Click **OK**.
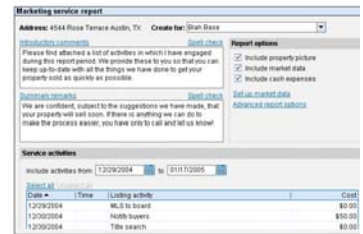
*"Do you lose more listings because you follow up too much or because you don't follow up enough?  When in doubt, follow up more often."*

*TERI BRENKUS
THE BRENKUS TEAM
LAS VEGAS, NV*

## *Servicing Sellers*

> *c.* **Publish and send**
>
> > *i.* Choose the email template you wish to use by selecting from the **Category** and **Template** drop-down menus. Enter any additional recipients' email addresses in the **To** field. Click **Next**.
> >
> > *ii.* Make any necessary changes to the email.
> >
> > *iii.* ✉ Send
>
> *d.* **Save to disk –** save the file to your computer or disk. Click **Save.**
>
> *e.* **Save and print later –** in the **Print later** prompt, enter the **Report name**, the **Date** you wish it to come due, and who the activity will be **Assigned to**. The report will come due in **Today's business** under **Service reports**. Click **OK**.
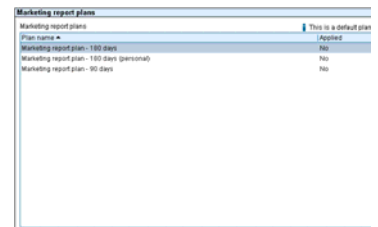
*9.* ⊗ Close

### *How to send out automatic listing service reports*

To set up an automated service report plan:

*1.* In the top toolbar, click **Listings**>**Current Listings**.

*2.* Double-click on the listing for which you wish to set up automatic service reports.

*3.* In the **Listing details for…** screen, click on the **Service report** tab.

*4.* In the left-hand navigation click **Automatic reports**.

*5.* In the **Marketing report plans** screen, double click the report plan that you wish to apply to the listing.

*6.* **Add new** reports or **View or edit** the existing reports on the plan to customize it to the way you do business. ⊗ Close

*7.* Back in the **Marketing report plans** screen, click **Apply** in the left-hand navigation. ⊗ Close

*8.* The activities for report plans will come due in **Today's business** under **Service reports**.

# *Servicing Buyers*

**4.
Servicing
Clients**

Although servicing buyers is typically a hands-on process, TOP PRODUCER also has several buyer action plans that help you keep in constant communication with your buyers. Keller Williams Realty has also added a Buyer Services Checklist in the Communication library.

After you have launched a buyer plan, activities for the buyer will come due in the **Today's business**. As part of your daily routine, you should complete any due buyer activities. As you complete those activities remember to *mark them done*. TP 7i places any activities that are marked done on a seller report that is emailable, printable, and publishable to the web.

*How to launch a buyer action plan*

1.    In the top toolbar, click **Contacts**>**Address book**.

2.    Find the contact's name by clicking on the first letter of their last name beside the address book and/or using the arrows to scroll. Double-click on the contact's name.

3.    Click on **Action Plan**.

4.    In the left-hand navigation, choose **Select plan**.

5.    In the **Apply action plan** prompt, scroll through the **Available plans** and select the appropriate plan.

6.    Click **Add**. In the **Select plan start date** prompt, select the correct **Start date**. Click **OK**.

7.    Click **OK**. ⊗ **Close**

8.    You can create, edit, and delete activities in your buyer action plans just as with your other action plans (see pg. 54). To create a new buyer action plan, select **Setup**>**Plans setup** in the top toolbar (for more information on creating action plans, see pg. 55).
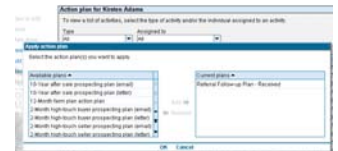
*How to print the Buyer Services Checklist*

1.    In the top toolbar, click **Mail**>**Communication library**.

2.    In the **List of categories** drop-down menu, select **KW Checklists**.

3.    Double-click the **Buyer Services Checklist** in the **Letter name** list.

4.    🖨 **Print** . In the **Print** prompt, set your printer options and click **OK**.

5.    Follow the Buyer Services Checklist to meet and exceed your buyers' expectations.
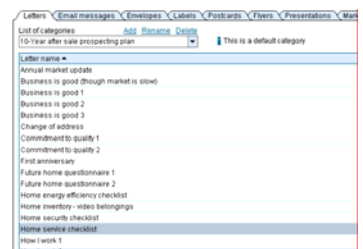
YOUR BUSINESS IS YOUR DATABASE

# *Chapter 7: Managing Transactions*

## Objectives:

[1]   *Coordinate closings using closing action plans and closing service reports.*

[2]   *Close files in TP 7i after the sale.*

# *Coordinating Closings*

**5.
Managing
Transactions**

The best Realtors will tell you that repeat and referral business is generated *during* the sale, not *after*. Exceeding your clients' expectations during the transaction is what brings them back again and again and makes them want to refer others. That's why Realtors like Cyndi Cummings have systems in their business to make sure that their clients are serviced the way they should be. And for Cyndi, her contact management software *is* that system.

"When I was a new agent just starting out in the business, it didn't take me long to realize that I needed to have solid processes in place to achieve my sales goals," says Cyndi. "There were too many details, too many transactions, and too many clients to take care of properly; relying on memory was not going to be the way to have the information I needed when I needed it. Very soon it became obvious to me that important things can fall through the cracks if your processes are not automated and reminders not set within the systems.

"In my pursuit of the best system, I went to every class, every seminar held to improve those processes. Once I previewed TOP PRODUCER, I immediately recognized it as the perfect automated solution," she says.

Now Cyndi uses TP 7i to make sure that she never drops the ball with her clients. "My closings are all coordinated using my own customized closing plan. Not only does it give me peace of mind, it also presents that 'wow' closing that we strive to achieve in each and every transaction."

And TP 7i has also allowed her to begin leveraging herself to grow her business. "I have recently added a part time assistant, and, with this system in place, she has been able to hit the ground running. This has freed me up to go out and get that next deal!"

Contact management really will systematize your business—just ask Cyndi.

When a listing or a buyer goes under contract, you can leverage TP 7i to help you with the closing details. Not only will TP 7i remind you of all of the paperwork and activities that need to be completed in order to close successfully, but it will also keep your clients informed of the closing process via closing reports.

# Coordinating Closings

*How to create a seller closing*



To create a closing for sellers:

1.  In the top toolbar, select **Listings**>**Current listings**.

2.  Double-click on the listing you want and select **Create closing** from the left-hand navigation.

3.  In the **Create closing – indicate…** screen, click **Buyer**, **Seller**, or **Seller and Buyer** below **I represent the**.

4.  **Selected sellers –** if there are additional sellers not attached to the listing you created, search your database for them , click on their name, and click **Add** by the **Selected sellers** field.  If necessary, you can create a new contact record by clicking **Add new contact**.

5.  **Selected buyers –** if you will be representing the buyers as well, search your database for them, click on their name, and click **Add** by the **Selected buyers** field.  If necessary, you can create a new contact record by clicking **Add new contact**.

6.   Next

7.  In the **Create closing – select…** screen, you may select a closing plan for the closing.  To customize a closing plan for this closing, see pg. 130.

8.   Finish

9.  In the **Closing details for…** screen, you will see the closing activities listed in the **Activities** field.  These activities will come due in Today's business under **Closing to-dos**.
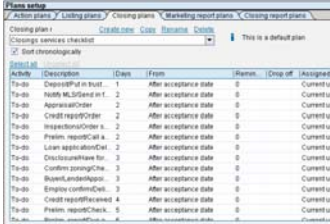
10.  Close
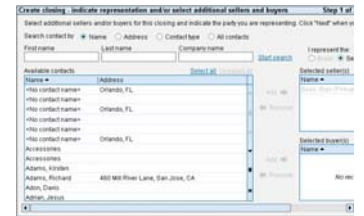
# Coordinating Closings

## *How to create a buyer closing*

Before you can create a closing for the buyer, you must enter the seller and their information into TP 7i, even though you may not be representing them. When you are ready to create a closing for your buyer:

1.  In the top toolbar, click **Closings**>**Create closing**.

2.  In the **Create closing – search or create new contact** screen search for or create the *seller's* contact record:

    a.  **If the seller is in your database:**

        i.   Select whether you wish to search for the seller's record by their **Name** or **Address**.

        ii.  Enter the search information in the fields provided. **Next**

        iii. Select the seller's name from the search list. **Next**

    **Or**

    b.  **If the seller is not in your database:**

        i.   Check the **Don't search. I will create a new contact record for this closing.** box by clicking on it. **Next**

        ii.  Create the contact's record. **OK**

3.  In the **Create closing – indicate…** screen, click **Buyer**, **Seller**, or **Seller and Buyer** below **I represent the:**.

4.  **Selected sellers –** if there are other sellers involved in the transaction that are in your database, search for them , click on their name, and click on **Add** by the **Selected sellers** field.  If necessary, you can create a new contact record by clicking **Add new contact**.

5.  **Selected buyers –** search your database for the buyer, click on their name, and click on **Add** by the **Selected buyers** field.  If necessary, you can create a new contact record by clicking **Add new contact**.

6.  **Next**

7.  In the **Create closing – select…** screen, you may select a closing plan for the closing.  To customize a closing plan for this closing, see pg. 130.

8.  **Finish**

9.  In the **Closing details for…** screen, you will see the closing activities listed in the **Activities** field.  These activities will come due in Today's business under **Closing to-dos**.

10. **Close**

# *Coordinating Closings*

## Closing Action Plans

TOP PRODUCER has a closing plan called Closing Services Checklist.  You will want to customize the plan to your method of servicing your closings. After you have launched a closing plan, activities for the closing will come due in the **Today's business** screen under **Closing to-dos**.  As part of your daily routine, you should complete any due closing activities.  As you complete those activities remember to *mark them done.*  TP 7i places any activities that are marked done on a closing report that is emailable, printable, and publishable to the web.

### *How to customize closing action plans*

1. In the top toolbar, click **Closings**>**Closing plans**.

2. Choose the plan you wish to customize from the **Closing plan** drop-down menu.

3. You can create, edit, and delete activities in the plans just as with your other action plans (see pg. 54).

4. To create a new closing action plan, click **Create new** above the **Closing plan name** drop-down menu (for more information on creating action plans, see pg. 55).

5. ⊗ **Close**

### *How to execute Closing to-dos*

When a closing activity comes due in Today's business:

1. In the top toolbar, select **Schedule**>**Today's business**>**Summary**.

2. Click on **Closing to-dos**.

3. Double-click on the closing activity you wish to complete.  For more information on completing various activities, see Lead Generation Activities on pg. 67.

4. When you are done with an activity, click **Mark done** in the left-hand navigation. A prompt will ask if you wish to mark the activity done; click **Yes**.

5. The **Add activity to service report** prompt will appear.  Click **Yes** if you wish for your clients to be able to see that you have performed this activity.

# Coordinating Closings

6. In the **Add activity for…** prompt, add any details about the activity that you wish the client to know. Click **OK**.

   **NOTE:** *If you add the **Cost** of the activity, you can choose later to hide it from your clients when you send out the service report.*

## Closing Service Reports

Like Listing Service Reports (pg. 123), TP 7i allows you to create closing service reports and send them to a password-protected Internet site, where your sellers and buyers can log in to see reports on what steps you have taken in servicing their closing. You also have the option of emailing or printing and mailing these reports directly to your clients.

In addition to activities completed as part of the closing action plans, you can also document any notes or feedback on the closing in the **Notes** field in the **Closing details…** screen and include this in your closing service reports to clients.

*"Top Producer 7i has revolutionized The Patel Team's ability to share information."*

*USHA PATEL*
*THE PATEL TEAM*
*ALLENTOWN, PA*

### *How to create closing service reports*



If you have not set up a customer website (see pg. 122), you must do so before you can publish closing service reports to the Internet:

1. In the top toolbar, click **Closings**>**Current closings**.

2. Double-click on the closing for which you wish to publish a service report.

3. In the **Closing details for…** screen, click on the **Service report** tab. You will see all activities that you have completed.

4. In the left-hand navigation, click **Report**.

5. In the **Closing service report** screen, you can customize your service report.

6. **Introductory comments** and **Summary remarks** – you can make one time changes to these fields by typing them in the window. To make permanent changes, click on **Introductory comments** or **Summary remarks**. In the **Insert comments/remarks** screen create your customized comments/remarks. **OK**

## *Coordinating Closings*

7. **Report options** – click on the checkboxes to remove and add elements of the report. You can also click **Advanced report options** to further customize the report.

   **NOTE:** *If you do not wish to **Include cash expenses** in the service report, make sure that the checkbox is unchecked.*

8. When you are ready to send or save the report, choose the appropriate option from the left-hand navigation or click ✅ **Save and print later**:

   **NOTE:** *The first time you publish a report, choose **Publish**. It will send the username and password that the client needs to access the site. To notify clients of subsequent reports, you will need to click **Publish and send**.*

   a. **Print –** set your printer options and click **OK**.

   b. **Publish** (to the Internet)

      i. An email template addressed to the seller will be automatically created for you. Make any necessary changes to the email. ✉ **Send**

      ii. A confirmation screen will appear with the URL to the published page. Click **OK**.

   c. **Publish and send**

      i. Choose the email template you wish to use by selecting from the **Category** and **Template** drop-down menus. Enter any additional recipients' email addresses in the **To** field. ▶ **Next**

      ii. Make any necessary changes to the email.

      iii. ✉ **Send**

   d. **Save to disk –** save the file to your computer or disk. Click **Save.**

   e. **Save and print later –** in the **Print later** prompt, enter the **Report name**, the **Date** you wish it to come due, and who the activity will be **Assigned to**. The report will come due in **Today's business** under **Service reports**. Click **OK**.

9. ✖ **Close**

*(continued on the next page)*

# Coordinating Closings

*How to send out automatic closing service reports*

To set up an automated service report plan:

1.  In the top toolbar, click **Closings**>**Current closings**.

2.  Double-click on the closing for which you wish to set up automatic service reports.

3.  In the **Closing details for…** screen, click on the **Service report** tab.

4.  In the left-hand navigation, click **Automatic reports**.

5.  In the **Closing report plans** screen, double click the report plan that you wish to apply to the closing.

6.  **Add new** reports or **View or edit** the existing reports on the plan to customize it to the way you do business. **Close**

7.  Back in the **Closing report plans** screen, click **Apply** in the left-hand navigation. **Close**

8.  The activities for report plans will come due in **Today's business** under **Service reports**.
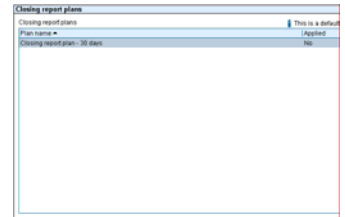
*"The beauty of utilizing contact management systems like Top Producer is that you are able to make your clients feel special while at the same time running a very efficient real estate practice…We really believe in 'high tech, high touch.'"*

*BETSY SCHEFFE*
*THE SCHEFFE GROUP*
*AUSTIN, TX*

# At the Point of Closing

At the point of closing, make sure that you complete the necessary steps in TP 7i to close the file and transfer the property information from the seller's to the buyer's contact record. The property information will still be viewable in the seller's record; however, the Property type will change to **Pre-owned**. All of the property statistics and photos for the property will also transfer to the buyer's contact record.

If your client was a referral, you will also need to close out the file in the referral manager. In addition to rewarding the referring contact, you will need to compensate any referring agents. You should then place the client on an appropriate lead generation action plan to ensure future business and referrals.

## How to close a file

1. In the top toolbar, select **Closings**>**Current closings**.

2. Double-click on the closing file you wish to close.

3. From the **Status** drop-down menu at the top, select **Closed/Paid**.

4. The **Stop reminders** prompt will appear if you put the closing party on a closing action plan. Click **Yes**.

5. The **Transfer property** prompt will appear. Click **Yes** to transfer the property from the seller's contact record to the buyer's.

6. In the **Transfer property** screen, select whether the sold property will be the buyers primary or investment property. If you choose to make it the buyer's primary property and the buyer already has a primary property, you will have to choose to assign the older property as an investment property or delete it. 🔵 Next

7. Select the appropriate property association option for the seller. 🔵 Next
   If you choose **Add a new property**, enter the property information. 🔵 Next

8. ✅ Finish

9. In the **Closing details for…** screen, check the **Source**. If the contact was a referral, you will need to close out the file in the **Referral manager**.

10. You should also begin the buyer and seller on the appropriate lead generation action plan (see pg. 56).
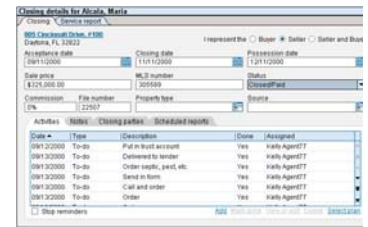
# At the Point of Closing

## How to close a referral

1. In the top toolbar, select **Contacts**>**Referrals**.

2. Double-click on the referral that has closed.

3. In the **Transaction status** drop-down menu, select **Closed/paid**.

4. Document that you have properly rewarded the referring party in the **Referral notes** section.

5.  Close