MAPS Agent Contact Types

Note, series' with a ( ) in the title indicate a "header" type, indicating the general purpose of the series; the "header" should not have any contacts associated. Example: 02.0 (Buyer Pipeline)

Note, there are examples of "building out" a series. Example: In the 03.0 (Action Plans and Campaigns) series, you'll see 03.10 (12 Direct), 03.11 12 D Newsletter, 03.111 12 D {Subdivision} Newsletter, 03.112 12 D {Subdivision} Newsletter. This is for use and as an example of how to add to your Contact Type list while still keeping the naming process and organization intact. Brackets { }, indicate insert (if needed) appropriate info. {Agent] indicates use as a Team with more than one agent on the Team; {Subdivision} indicates a specific subdivision. Use if you have different marketing pieces for different subdivisions.

Best practice to modify the list is to copy an existing Contact Type, then overtype/replace the new name as any extra or missing spaces or other mistyped characters will disrupt the "alphabetization" of the list.

0.00 (Inquiry unassigned)
0.01 Seller Inquiry unassigned
0.02 Buyer Inquiry unassigned

01.0 (Seller Pipeline)
01.{Agent}.1 Seller Inquiry
01.{Agent}.2 Seller Lead
01.{Agent}.3 Seller Active
01.{Agent}.4 Seller Closed
01.{Agent}.5 Seller Expired
01.{Agent}.9 Seller Lost

02.0 (Buyer Pipeline)
02.{Agent}.1 Buyer Inquiry
02.{Agent}.2 Buyer Lead
02.{Agent}.3.0 Buyer Active – No Agreement
02.{Agent}.3.1 Buyer Active - Agency Agreement Signed
02.{Agent}.4 Buyer Contract
02.{Agent}.5 Buyer Closed
02.{Agent}.9 Buyer Lost

03.0 (Action Plans and Campaigns)
03.10 (12 Direct)
03.11 12 D Newsletter
03.111 12 D {Subdivision} Newsletter
03.112 12 D {Subdivision} Newsletter
03.12 12 D Market Statistics
03.20 (8x8)
03.21 (8x8 Seller)
03.211 8x8 Seller - General
03.212 8x8 Seller – FSBO
03.213 8x8 Seller – Expired

03.22 (8x8 Buyer)
03.221 8x8 Buyer – General
03.222 8x8 buyer - Relocation
03.30 (33 Touch)
03.31 33 Touch – General
03.32 33 Touch – Seller Internet
03.33 33 Touch – Buyer Internet
03.34 33 Touch – Past Client
03.341 33 Touch – Past Client High
03.342 33 Touch – Past Client Medium
03.343 33 Touch – Past Client Low

04.0 (MREA Status)
04.1 Met
04.2 Haven't Met – TARGET
04.3 Haven't Met
04.4 Advocate
04.5 Core Advocate

05.0 (Client Type/Demographic/Mailing List)
05.1 (Seller)
05.11 Seller Investor
05.12 Seller REO
05.2 (Buyer)
05.21 Buyer Investor
05.22 Buyer – First Time
05.23 Buyer – Condo

06.0 (Source)
06.1 Referral
06.11 Referral {Name}
06.2 FSBO
06.3 Expired
06.4 Open House

Session 1 - Business Building Activities

❖ Complete any unfinished "**It's Your Turn**" action items

     Action: Enter Contact Record (self)

          Name

          Primary Contact Method - Telephone

          Secondary Contact Method - Email

          Address

          Note

     Action: Modify Your Contact Type List

          Open Your Contact Record

          Add Contact Types to List:

               * Apply 8X8 Action Plan

               04.1 Met

     Action: Modify newly entered Contact Record (Self)

          Add birthday

          Add birthday reminder

          Add additional phone number

          Add note

     Action: Send yourself a Mass Email

          Category: .KW Agent Website Stationary

          Template: You choose

          Text: You choose

❖ Send Mass Email to self and selected contacts

❖ Add 10 new "Met" Contact Records to database every day according to *MAPS* standards

     Assign "* Apply 8X8 Action Plan" Contact Type

     Assign "04.1 Met" Contact Type

❖ Modify existing database according to *MAPS* standards

     Assign "04.1 Met" Contact Type

     Assign other Contact Types as appropriate

          Modify Contact Records individually as accessed or as a project

          Use Mass Update tool as needed

Business Building Activities

❖ Visit *Top Producer Tech Forum*

>> Post questions and answers, ahas, challenges and successes

❖ Read *Millionaire Real Estate Agent* pages 119 – 152

❖ Read *SHIFT* *p*ages 49 - 81

❖ View *KW Connect*

>> Your Business is Your Database 8i

>>> Introduction: Introduction to Your Business is Your Database for Top Producer 8i (9:23)

>>> Session 1: Getting Started

>>>> Layout and Navigation – The Dashboard (4:14)

>>>> Setting up and editing your Email and Letter Signature (4:29)

>>>> Helpful Tips and Tricks to know about Top Producer 8i (5:18)

>>> Session 2 – Creating Quality Contracts

>>>> Adding Basic Information (3:15)

>>>> Adding Detailed Information (6:21)

>> Lead Generation 36:12:3

>>> Power Session 2: Prospecting

>>>> Newscast (4:01)

>>>> How do I approach, connect and ask? (2:00)

>>>> Need a script for talking with neighbors? (0:23)

❖ View *Top Producer Campus* - 8i Videos:

>>> How to Set-Up Internet Explorer 7 for Top Producer

>>> Getting Started with Top Producer 8i

>>> How to Set Up Mozilla Firefox 2.0 for Top Producer 8i

>>> How to Add a Contact in Top Producer 8i

>>> How to Edit a Contact Record in Top Producer 8i

>>> Contacts Landing Page

>>> Finding a Contact

>>> How to Perform a Mass Email in Top Producer 8i

>>> Performing a Mass Update in Top Producer 8i

Session 2 - Business Building Activities

❖ Complete any unfinished "**It's Your Turn**" action items

    Action: Schedule To Do for Yourself:

        Send handwritten thank you note (Today)

    Action: Schedule your Team Meeting as recurring appointment

    Action: Enter Lead

    Action: Convert Lead:

        Open Contact Record

        Add/Complete Activity

        Schedule next Activity

        Convert from Lead to Contact

❖ Add 10 new "Met" Contact Records to database every day according to *MAPS* standards

    Assign "* Apply 8X8 Action Plan" Contact Type

    Assign "04.1 Met" Contact Type

❖ Assign activity to "Met" Contact Records

    Possibly do mass update for next call date

❖ Schedule all new activities and appointments in *Top Producer*

❖ Schedule known activities and events

    Vacations and Holidays

    Profit Share distribution

    Time block for Business Building Activities

    Market Center Events

        Team Meetings

        ALC Meetings

    Regional Training Events

    KWRI events

        Family Reunion

        Mega Camp

        MasterMinds

        SHIFT Tour

    Shift with Top Producer Sessions

❖ Daily, check and complete Activities in Activities Summary screen

❖ Possibly perform data import

        Contact *Top Producer Help* for assistance 1-800-830-6047

❖ Send Mass Email to import group

❖ Visit *Top Producer Tech Forum*

        Post questions and answers, ahas, challenges and successes

❖ Read <u>*Millionaire Real Estate Agent*</u>

        Pages 217-227, and 289-305

❖ Read <u>*SHIFT*</u>

        Pages 83-108

❖ View *KW Connect*

        Success Series: Week 3 Planning and Accountability (12:30)

        Personal Development: Time Blocking (4:31)

        Breakthrough to Mastery: Lead Capture and Conversion (3:10)

        My Listings, My Leads: Part 1 (3:00)

        My Listings, My Leads: Part 2 (7:00)

❖ View *Top Producer Campus*

        How to Schedule and View Activities in Top Producer 8i

        Calendar Landing Page

Session 3 - Business Building Activities

❖ Complete any unfinished "**It's Your Turn**" action items

    Action: Apply 8X8 Action Plan to Yourself

        Open Your Contact Record

        Activities Tab

            Select Action Plan *".KW SHIFT 8X8 for investors – email"*

        Apply Action Plan

            Assign to matching Contact Type "03.202 *8X8 for investors – email"*

            Create new Contact Type if needed

    Action: Mass Update (yourself only)

        Search for Contacts by Contact Type "*Apply 8X8 Action Plan"*

        Check Yourself ONLY

        Add Action Plan "*.KW SHIFT 8X8 for newly met not buying or selling"*

        Match Contact Type

            Add matching Contact Type "03.201 *8X8 for newly met not buying or selling"*

            Remove from Contact Type "*Apply 8X8 Action Plan"*

        Add Note

        Update and confirm

❖ Add 10 new "Met" Contact Records to database every day according to *MAPS* standards

        Assign appropriate Action Plan and matching Contact Type

        Assign "04.1 Met" Contact Type

❖ Assign appropriate *SHIFT* 8X8 Action Plan to prior "Met" Contact Records assigned to "Apply 8X8 Action Plan" Contact Type

        Either when previously scheduled Activity pops up

        Or via Mass Update – be careful to "spread out" the launch dates

❖ Schedule all new activities and appointments in *Top Producer*

❖ Daily, check and complete Activities in Activities Summary screen

- ❖ Read Marketing Library "Read Me" files

    Email and Postcard Libraries

- ❖ Visit *Top Producer Tech Forum*

    Post questions and answers, ahas, challenges and successes

- ❖ Read *Millionaire Real Estate Agent*

    Pages 185 - 191

- ❖ Read *SHIFT*

    Pages 109 -134

- ❖ View *KW Connect*

    Lead Generation 36:12:3

    Power Session 4: Leveraging a Database

        Newscast (4:58)

    Power Session 5: Working With Mets

        Newscast (5:00)

    Your Business is Your Database 8i

        Session 3: Marketing Through Communication

            Template Library (1:25)

            Default Letter Templates (3:03)

            Create Templates (2:50)

        Session 4: Managing Follow-Up – Mass Mailings and Action Plans

            Overview of Action Plans (4:31)

            Marketing Messages to a Group (3:58)

            Your Net Exercise (10:30)

        Session 5: Managing Activities

            Activities Overview (2:52)

- ❖ View *Top Producer Campus*

    Marketing Landing Page (3:21)

<u>Session 4 - Business Building Activities</u>

❖ Complete any unfinished "**It's Your Turn**" action items

> **<u>Action:</u>** (Pretend to) Transition Contact Record (Yourself) from 8X8 Action Plan to 33 Touch Action Plan
>
> > Open your Contact Record
> >
> > Click Activities Tab – review Activities
> >
> > Assign 33 Touch Plan
> >
> > Click Contact Details
> >
> > Assign matching Contact Type – create if needed
> >
> > Add Note: Moved from 8X8 to 33 Touch

> **<u>Action:</u>** Create 12 Direct Program
>
> > Schedule recurring activity: to Do
> >
> > "Create and send 12 Direct"
> >
> > Pick day of week to recur monthly for 12 months – can modify/delete later

❖ Add 10 new "Met" Contact Records to database every day according to *MAPS* standards

> Assign appropriate Action Plan and matching Contact Type
>
> Assign "04.1 Met" Contact Type

❖ Transition Mets to appropriate 33 Touch Action Plan as they complete 8X8 Action Plan cycle

> Assign to matching Contact Type

❖ Assign "Targeted Haven't Mets" and low commitment Mets to 12 Direct Program

> Assign appropriate Contact Type
>
> Create To-Do to send 12 Direct to that group

❖ Perform data imports if needed

❖ Schedule all new activities and appointments in *Top Producer*

❖ Daily, check and complete Activities in Activities Summary screen

❖ Visit *Top Producer Tech Forum*

Post questions and answers, ahas, challenges and successes

❖ Read *Millionaire Real Estate Agent*

Pages 289-306

❖ Read *SHIFT*

Pages 271-283

❖ View *KW Connect*

Lead Generation 36:12:3

Power Session 6: Farming

Newscast (4:19)

Power Session 10: Lead Conversion

Newscast (4:19)

My Listing, My Leads

Session 1 (5:00)

Breakthrough to Mastery

Gaining Mind Over Market (4:00)

Upshifting Your Lead Generation (2:15)

10 Steps to Effective Marketing

Session 1 (21:07)

Session 2 (20:05)

❖ View *Top Producer Campus*

Copying and Adding Personal Templates (2:39)