Keller Williams University

Lead Generation 36:12:3

Power Session 4: Leveraging a Powerful Contact Database

Kim Harryman

Building Your Business with an Automatic Assistant

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Notes

Introduction

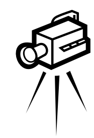
Ground Rules

1. Arrive to class on time and return promptly from breaks.
2. Move quickly when you are instructed to form small groups or partner with someone to role-play.
3. Limit your side conversations.
4. Turn your cell phones and pagers to vibrate or OFF.
5. Feel free to stand and walk around if you find yourself getting tired.
6. Accept the reality of time and participation.
7. Respect the different learning styles and opinions of others.
8. Help each other learn. None of us is as smart as all of us working together to improve our skills and knowledge.
9. Consider everything we do in class confidential. What is discussed and role-played behind closed doors *stays* behind closed doors.
10. Have fun!

How You Will Learn

Learning Methods

1. In this manual, you will find:
    - **Models and systems** that are tested and proven ways of accomplishing Big Goals.
    - **Exercises and discussion** that allow you to test new skills and clarify your thinking in a safe environment.
    - **Stories, lessons learned, anecdotes, and advice** from top agents who offer invaluable insights.
2. Your classroom learning experience will be enhanced by:
    - **PowerPoint slides** to help keep you on track with the topics inside the course manual.
    - **KWConnect videos** to enrich your understanding of the course material. Watch for the camera icon in your course materials.
    - **Your classmates and instructor**. Don't underestimate the value of what you can learn from your peers, who ask great questions, who share their experiences, and who participate in exercises with you.



Accountability Methods

Accountability is, in the KW experience, the most crucial part of goal achievement. To support your goal setting, we recommend you:

1. Develop a Lead Generation Action Plan. At the end of this course, you will create a plan that outlines the specific actions you will take to achieve your lead generation goals. You will also create a calendar that helps you schedule your specific activities into your daily 3 hours of lead generation time.
2. Select an accountability partner or program to help you measure, evaluate, and make adjustments to your Action Plan. Look to the following resources for an accountability relationship:
    - KW MAPS Institute individual and group coaching
    - Market Center Productivity Coach
    - Team Leader
    - ALC Members
    - Peers

Where You Are Today

Exercise

Where are you today with your lead generation efforts? Get into the habit of taking accountability for your actions and your progress. Take time to share with your instructor and your peers your aha's, your challenges, and your next steps.

Directions:

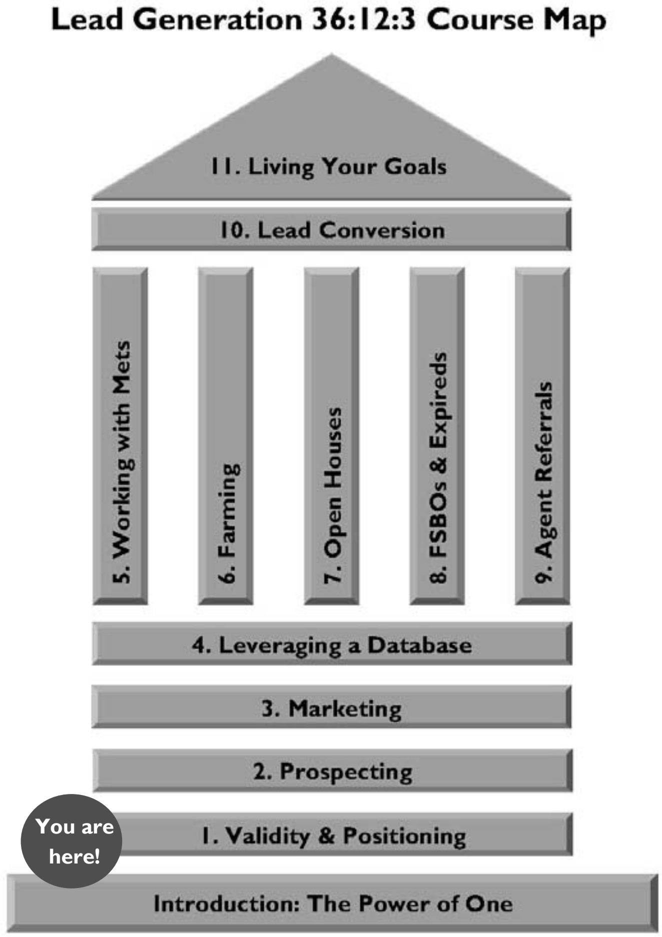
1. List the lead generation activities you completed during the last 24 hours.
2. What were your aha's?
3. What were your challenges?
4. Discuss what you will do differently in the next 24 hours.

Time: 10 minutes

1. Lead Generation Activities:	Time Spent on Activity
2. My aha's from these activities:	
3. The most difficult part of these activities:	
4. What I need to work on:	

Introduction

Why You Are Here



Seeing the Light

Read, underline, and share …

Bruce Hardie, a top-producing agent in Spokane, Washington, had a revelation when he realized the power that building and working a contact database could bring to helping him grow his business. He started his database with 25 people an dhas grown it to over 4,000 people he's met over a twelve-year period.

"When I first started, I would go out and do open houses of other people's listings. I would take floor calls. My biggest breakthrough was when I realized that I needed to go out and meet people. What I started to do was build my database. I started prospecting my Mets. That's really what I did. And it didn't take long once I started doing it. I was really astounded at how quickly business started to show up."

What Will Make This a Great Training Experience

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-
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Notes

The Power of a Database

A Record of Your Business Successes

Your ability to generate leads—and therefore, grow your business—is tied to your ability to amass and systematically prospect and market to a large database of contacts.

Truth

The heart of your business is your database.

And the heartbeat of your business is your regular contact with your database.

Don't think of your database as a file, or a software program, or a simple mailing list. Your database is the record of your business successes and its potential. In other words, *it is your business*. You will use it to record contact information for your leads, to track your interactions with them, and to assign them to appropriate marketing plans.

Truth

When you hear of doctors or lawyers selling their practice, what are they really selling?

Their contact database and the relationships they have built with people in it.

Database Tools

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

Debbie Zois
Debbie Zois & Associates
Las Vegas, Nevada

The tools that can help you manage your database take several forms:

1. **3 x 5 Index Cards** – Even index cards in a shoebox allow you to store and alphabetize the contact information for the people you know.
2. **Electronic Spreadsheet** – In addition to what index cards can do, an electronic spreadsheet, such as Microsoft Excel, allows you to quickly update contact information. You can also quickly sort your contact information by date, zip code, contact type, etc.
3. **Personal Information Manager** – A personal information manager program, such as Microsoft Outlook, gives you more abilities than a spreadsheet. It also allows you to assign action items and schedule activities such as making phone calls and sending direct mail pieces.
4. **Database Management System** – A database management system (DBMS), such as Microsoft Access, gives you extensive capabilities for sorting and filtering your data, including designing custom forms and reports for inputting and outputting your data.
5. **Contact Management System** – A Contact Management System (or CMS), provides you the most power to work with your database. A CMS can be specialized for real estate use and can track the history of the contacts, or touches, you've made with those in your database. A CMS can prioritize and prompt you regarding the specific actions you need to do each day to actively seek business. Many CMSs also help you do things like manage listings and transactions. Contact Management Systems are discussed in detail later in this Power Session.

Question

Which is the best type of database tool to use?

Answer

The one that you will actually use—and use systematically!

Obey the Law(s)!

Your contact database is the engine that drives your business. The size of your real estate business, over time, will be in direct proportion to the size and quality of your database. The following four laws will help you maintain your focus on daily lead generation:

The Four Laws

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.**

Notes

1. Build a Database

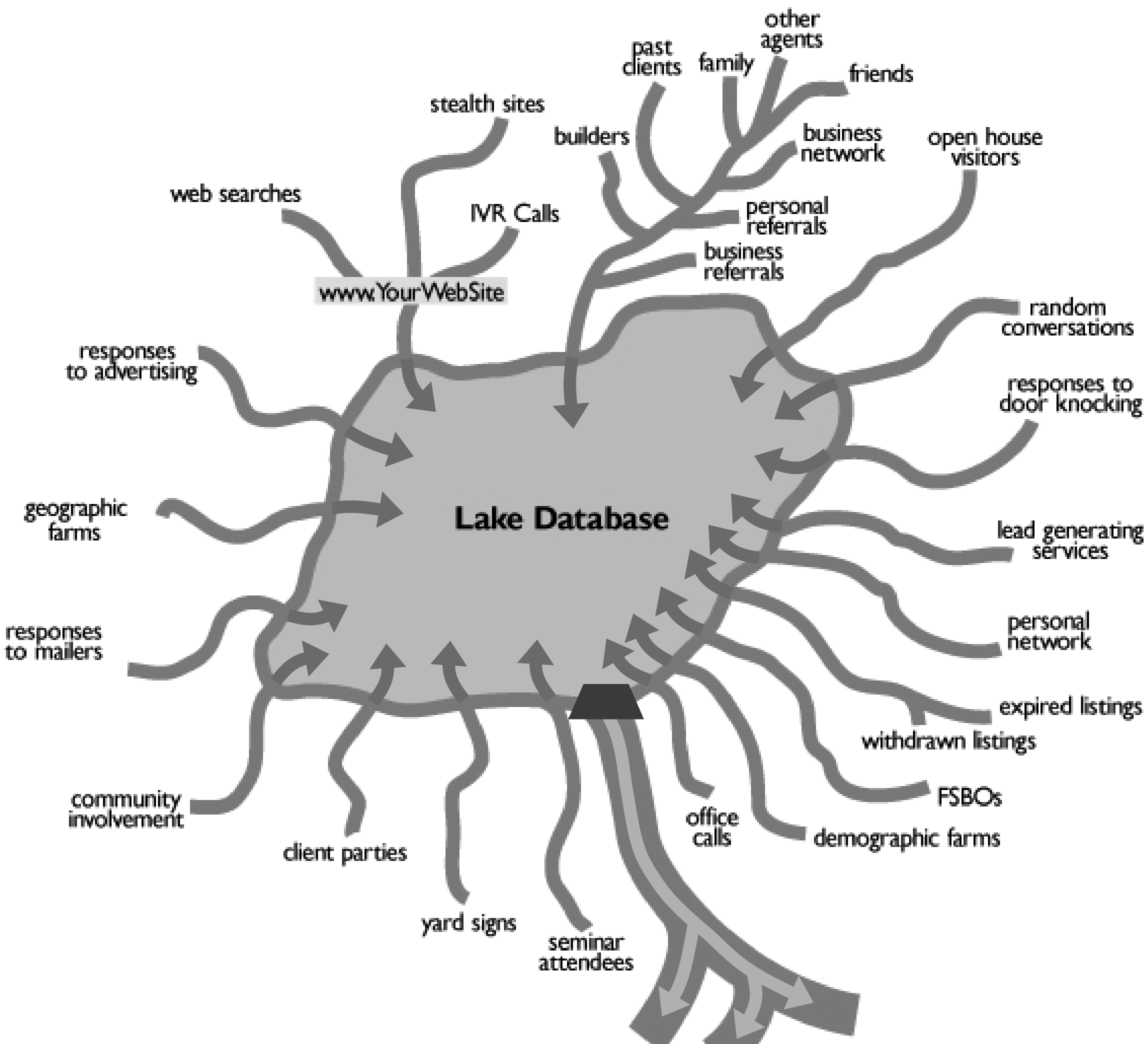
Many agents we spoke with in our research remember when they first started in real estate. They thought that for sure the business would just start flowing in the moment they received their licenses. They had always thought of real estate as the business of showing buyers houses and putting signs in sellers' yards. They soon realized that real estate is not just the business of *servicing* clients; it is, first and foremost, the business of *finding* clients to service.

The key to making the most of your lead generation is to build a database of the people you meet in your business. And of course, stay in touch with them. Over time, that database will become the engine of your business. It will power your lead generation, it will produce a continuous flow of referrals, and in the end, it will be a key financial asset of your sales business.

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

Where Contacts Come From

As you can see from the illustration below, the contacts you put in your database can come from a wide variety of sources. These "tributaries" feed your database each time you capture the contact information for a potential customer. Depending on your skills and your focus, some will be trickles and others white water torrents! Capturing them is your first job, but then you must cultivate them over time for new, repeat, and referral business. If you fail to systematically communicate with them, these leads will be like "water under the bridge."



***Note**: This course uses terms first used and defined in The Millionaire Real Estate Agent.*

Haven't Mets and Mets

Regardless of the lead generation source, the contact information you gather for your contact database can be classified into one of two fundamental groups: Haven't Mets and Mets.

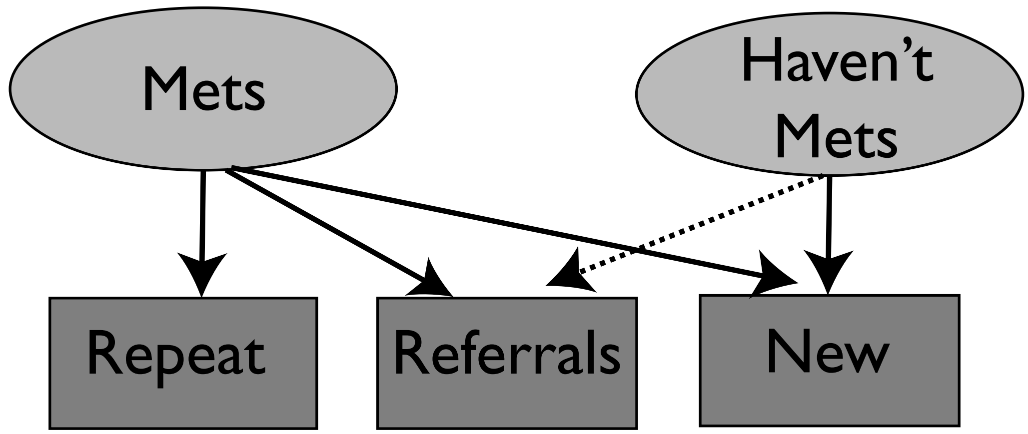
Category	Group	Definition
Haven't Mets	**General Public**	People you haven't met and who don't know you.
	Target Group	People you haven't met and don't know. It differs from the General Public in that you have targeted them as people with whom you'd specifically like to do business (like a geographic or demographic farm).
Mets	**Network Group**	Individuals who know you because you have met them either in person or by phone. *Might do business with you.*
	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* (mortgage companies, title companies, appraisers, landscapers, etc.).
	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.
	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.*

"Even if you only know 50 or 100 people, they need to be in your database."

Brad McKissack
McKissack Realty Group
Denton, Texas

The types of business Mets and Haven't Mets bring you

Let's look at the type of business you can expect your Mets and Haven't Mets to bring you.



Mets and Haven't Mets bring you business from three sources. It comes from:

1. Repeat
2. Referrals
3. New

Mets can provide you with repeat, referral and new business. Haven't Mets can provide you mainly with new business, but may provide you with referral business as well, particularly with Targeted Haven't Mets that have received your branded marketing over time.

How large should your database be?

The Millionaire Real Estate Agent provides us with some calculations for how many Mets and Haven't Mets you would have to work with to achieve 320 closed transactions in a single year. For the Mets, it assumes a 12:2 conversion rate if you've put them through an 8 x 8 and subsequently a 33 Touch program for 12 months. Likewise, the Haven't Mets assumes a 50:1 conversion rate if you've marketed to them with a 12 Direct program over the course of a year.

The Lead Generation Numbers Game			
	METS		**HAVEN'T METS**
Option 1	1,920 in database	+	0 in database
Option 2	0 in database	+	16,000 in database
Option 3	960 in database	+	8,000 in database
Net 320 Sales Per Year			

If you simply scale down these ratios for a target of 36 closed transactions in 12 months, and worked only with Mets (since they're the quickest way to get new business), this calculation would indicate that you would need 216 people in your Mets database. This, however, would not be accurate because:

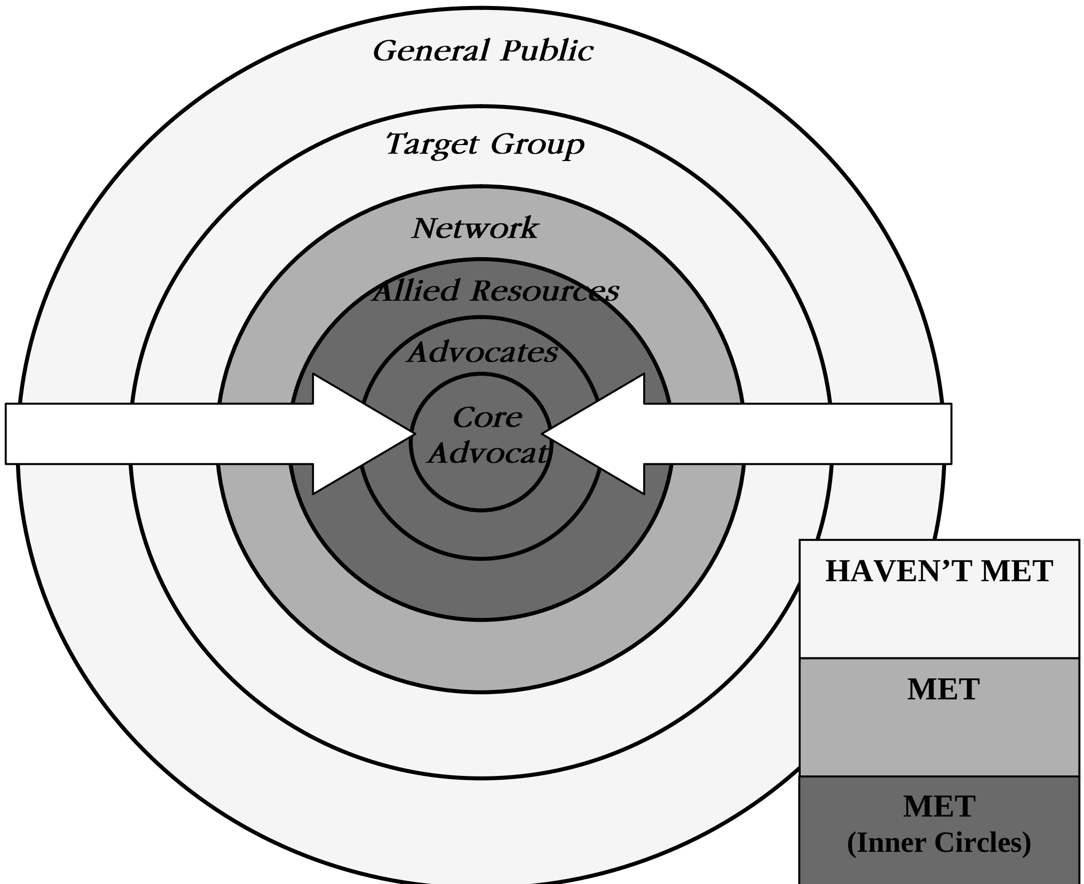
1. You would need to have ALL 216 people in your database from day one and have already been working them for some time. In reality, you'll be steadily building your Mets database over time.
2. The receiving of repeat and referral business from a Mets database increases over time and the number of contacts you have made with them. It will take two to five years of consistent communication to ensure hitting the 12:2 ratio.

It's best to follow the CAMP 4:4:3 model and collect 10 business cards each day. If you do this alone, in 200 working days you will have 2,000 people's names and addresses in your Mets database! Those contacts, when worked systematically, will likely be more than you need to hit your goal of 36 closed sides.

Classifying your Haven't Mets and Mets

Leverage your database to help you establish and maintain regular communication to continually build your relationships with your contacts so that they continually move toward becoming a Core Advocate.

For example, you may choose to market to Mortgage Loan Officers as a Target Group and begin doing business with one particular loan officer so that they become an Allied Resource. You may eventually build your business relationship to the point where they become a Core Advocate and send you a steady stream of business.



Scott Crouch, recognized as Sales Person of the Year for New Home Sales in Phoenix, Arizona, understands the power of Core Advocates and what they can do for your business. Scott thinks of it in terms of the 80/20 Principle. He says, "Out of 20 people, you're going to have 4, 5, 6 advocates that are going to sing your praises because you've done a couple of goods things. Go discover who those guys are. They are going to be the people who say 'Hey, thinking of real estate? Think of Scott Crouch. By the way, here's his card, here's where he lives. Let me tell you all about this guy.'"

20% of your database can lead to 80% of your business!

Building Your Mets Database

Here are some sources for building your Mets database:

a. Family
b. Friends
c. Neighbors
d. Home
e. School
f. People you do personal business with (e.g., grocer, dentist)
g. Sports and hobbies
h. Former employers, co-workers, suppliers, customers
i. Organizations
j. Other ______________________________

See *Power Session 5: Working with Mets* for specific guidelines on working with Mets.

"Everyone we meet goes into our database. Even though someone may not be an immediate buyer or seller, we put all of our Mets on an 8 x 8 plan to stay in touch."
Bruce Hardie
The Hardie Group
Spokane, Washington

Who Knows You Already?

Exercise

Who knows you already that you may not have thought to add to your database?

Directions:

1. Listen as the instructor leads you through an exercise to jog your memory about people that you already know that you may not have thought of.
2. Use the blank lines below to make a list of the people who come to mind.

Time: 15 minutes (you can also repeat this exercise on your own once you get back to your own office to think of even more people)

	Name	Occupation
1.		
2.		
3.		
4.		
5.		
6.		
7.		
8.		
9.		
10.		

Building Your Haven't Met Database

As your business grows, you may have the desire (and budget) to begin marketing to groups of Haven't Mets such as geographic or niche farms.

Two main sources to acquire Haven't Mets contact information from are:

1. **Title Companies** – Often title companies will supply you with lists of contacts you haven't met free of charge. You may want to comarket with the title company to reduce printing and mailing costs.
2. **Third Party Vendors** – You can also purchase lists from vendors. All three major credit bureaus: TransUnion, Experian, and Equifax sell mailing lists. There are also vendors who provide services such as sending out Just Listed/ Just Sold postcards around your listings. The cost depends upon the vendor and the size of the mailing. Keller Williams Realty has a list of approved vendors that you can access by logging in to the Keller Williams Intranet and clicking on the **Marketing/Vendors** tab.

Some agents do maintain their own Haven't Met database, typically for a small farm. Print marketing vendors maintain larger databases themselves. Just tell them where your farm or listing is and they will send the mailing out. This makes it easier to ensure that the right name is on the marketing piece. Imagine trying to keep up with correct names of homeowners in a farm of 2,500 plus!

After a year and a half in the industry, and knowing only one person in Denver when he moved there, Greg Drake quickly realized the importance of working with Allied Resources to help him build a top-producing business."I try to contact as many people within the industry or ancillary services and go to lunch with them, get coffee or whatever, to develp a relationship with them so we can cross-market each other's databases. For instance, I'm working with an insurance guy right now and a lender where we are going to send out value-add pieces to each others' databases saying that we are affilitated and have great working relationships. The message on the value-add piece will be that if you have a need for insurance, mortgage, real estate services, you call these people that are part of my team."

Notes

2. Feed It Every Day

The CAMP 4:4:3 course stresses the important of meeting the Daily Challenge to:

1. Collect 10 business cards
2. Call 5 people
3. Write 15 notes
4. Preview 5 homes

Growing a strong database is not a one-time or even part-time activity. It is vital that you persistently continue the daily activities prescribed in *CAMP 4:4:3*. In particular, the business cards you collect will provide you with contacts to add to your database. The Daily Challenge is about building an important business habit. Whenever you meet someone new—whether a chance encounter at the coffee shop or through purposeful prospecting like networking or door knocking—you should always be looking for the opportunity to capture their contact information for your database.

The astounding potential for what 10:5:15:5 can accomplish for your business is put into clear perspective by Gary Keller, cofounder and chairman of the board, Keller Williams Realty, and Dave Jenks, vice president of research and development, KWRI. "In *The Millionaire Real Estate Agent* research we realized that if you add 10 people a day to your database and do this for 200 working days, that will give you a database of 2,000 names. And that's the database of … a Millionaire Real Estate Agent."

If you have not completed CAMP 4:4:3, please refer to the CAMP 4:4:3 course materials for specific details regarding 10:5:15:5 activities.

Mets do NOT have to be local real estate agents; family members and others in your sphere of influence who live outside your area can be a valuable source of referral and new business.

Expanding Your Mets Database

Dave Jenks expresses the clear priority of the steps to take after you have built your initial Mets database. “Once you have put everyone you know into your Mets database, your next challenge is to expand it. Your goal is to meet more people, build those relationships and ask them for business.”

The key to adding Mets to your database is to be proactive. By using the prospecting and marketing methods listed below, you will make contact with new people to add to your database.

1. Phone calls and personal visits with your past customers, others in your sphere of influence, and anyone else already in your Mets database. This is vital “database maintenance” to keep the hard-won contacts you have and collect more meaningful information about them (birthdays, anniversaries, etc.)!
2. Meeting new people through school, church, neighbors, sports/hobbies, your community, etc.
3. Open Houses
4. Geographic and/or Niche Farms
5. For Sale By Owners
6. Expired Listings
7. Agent-to-Agent Referrals
8. Internet Leads

You will probably not use all of these lead generation methods. Focus on the methods that are the most productive for you and the ones which best suit your personality profile. However, whichever methods you use, you should definitely be using a database to help you make consistent personal contact with your past clients, others in your sphere of influence, and anyone else already in your Mets database. In the next few pages, we’ll detail kinds of business and personal information you’ll collect to make these contacts rich and productive.

What to Feed Your Database

You must gather at least a minimal amount of information from each new person you meet in order to be able to add them to your database and maintain consistent personal contact with them. Depending on the setting, you may be able to gather:

1. **Their Name** – Make sure you note the accurate spelling of their name.
2. **Their Home Address** – If they already own property, you should be able to find their home address by simply searching the county property tax records.
3. **Their Home Phone Number** – You can ask permission for a follow-up phone call to discuss an item of value you will send.
4. **Their Email Address** – Although many people are more comfortable giving their email address than their phone number, be sure to ask for their home address before you ask for their email address. If you get their email address first, it will be harder to get a mailing address. An all email follow-up campaign will not be as effective.
5. **Their Business Card** – Their business card will provide their name, business phone number, business address, and probably their business email address and fax number. When you collect a business card, write on the back:
   - Who was with them
   - What day you met them
   - Where you met them (ex. by the elevator)

When you follow up with them you can include these details to help them remember you.

The idea is to get enough information to set them up on an 8 x 8 and 33 Touch marketing action plan. (These are discussed later in this course).

The FORD Technique

At your first meeting, or during a follow-up phone call or meeting, you may have the opportunity to speak with your prospects at length and use the FORD technique. FORD stands for

F – Family

O – Occupation

R – Recreation

D – Dreams

This will afford you the opportunity to gather additional information that will help you build your relationship more quickly such as:

1. **Buyer or Seller** – What are they looking for? Do they wish to buy a home or sell one?
2. **Their Urgency** – How soon are they likely to do business with you?
3. **Their Spouse's Name** – Their spouse will almost certainly be involved in any future transaction. You want to get to know them too.
4. **Their Personality Profile** – So you can adapt your communication style to theirs.
5. **Their Birthday** – Everyone likes to receive a card on their birthday!
6. **Their Hobbies/Interests** – This can help you choose which postcards and/or items of value to send them.
7. **Children** – Find out the names and ages of their children.

Buyer and Seller Data

As you move forward in building your relationships with your contacts and conducting Listing Consultations and/or Buyer Consultations, you will need to gather specific data from your contacts.

Exercise

What information do you need to collect for a Seller Prospect versus a Buyer Prospect?

Directions:

1. Break into small groups of four to six people.
2. Your instructor will assign you as either a Buyer or Seller group.
3. Use the checklist on the following page to indicate which information you will need to gather from a Buyer or Seller prospect.
4. Discuss how you might use this information to build or strengthen relationships, establish trust, provide greater service, and so forth.
5. Choose a spokesperson and be prepared to present your results to the class.

Time: 15 minutes

	Contact Information		Property Information
✓	Source of contact (ad, referral, open house, etc.)		Address of property
✓	Referral's name		Date property was purchased
✓	Date referred		Purchase price
✓	Contact's name, address, phone, fax, email		Assessed tax value
	Contact's employer and work phone		Desired sales price
	Contact's job title		Occupancy: residence, rental, other
	Contact's start date of employment		Date of lease end
	Contact's date of birth		Date listing to expire
	Spouse's name		Mortgage balance
	Spouse's employer and work phone		Loan type
	Spouse's job title		Interest rate
	Spouse's date of birth		Available equity or down payment
	Spouse's start date of employment		Description of property
	Anniversary date		House style
	Children(s) names		Number of bedrooms, sizes
	Children(s) date of birth		Number of baths, sizes
	Recreation, hobbies, interests		Features
	Desired move date		Property square footage
	Date began house hunting		Home's square footage
	Owns or rents		Age of home
	Desired property features		Information on the neighborhood
	Desired property price range		
	Working with another agent (Yes / No)		
	Name of the agent they're working with		
	Name of the lender they're working with		
	Lender's address, phone, fax, email		
	Has met with lender (Yes / No)		
	Plans to do a FSBO (Yes / No)		
	Able to offer seller financing (Yes / No)		
	Seen houses they like (Yes / No)		
	Available down payment ($ / %)		
	Maximum monthly payment		
✓	Contact history (conversations, mailings)		
✓	Classification for potential for referrals		
✓	Database group		

✓ = "Must have" contact information

Be sure to promptly update your database anytime a contact's information changes or you get additional information about a contact.

Adding contacts

Once you have your database set up, you will need to systematize the way in which you feed it from your prospecting and marketing efforts.

When to enter contacts

Enter new contacts into your database any time, but generally speaking, the sooner the better. You want to enter information while it is still fresh on your mind. You also want to avoid a backlog of data entry that can feel like a chore to be avoided. That's why part of your daily 3-hour habit is set aside for contact updates and entry.

1. A prospective customer calls looking to buy or sell a home.
2. You meet someone new. *Everyone* you meet is a potential client, Allied Resource, Advocate, etc.

Updating contact info

Any time information for any of your contacts changes, you should update their information immediately. Each time you speak with a contact, make sure that you record any changes (phone number, address, email address, place of employment, etc.) in your database.

Contact history

The more contacts you add to your database, the harder it will be to remember relevant details about the lives and transactions of all of your contacts. However, it is remembering the details that lets your customers know that they are important to you.

1. To help you remember, you should be keeping a history of all correspondences with each contact in your database. The history should record the dates and highlights of any conversation, email, letter, etc.
2. If you use a Contact Management System (CMS), the CMS will automatically maintain a history for each contact in your database. Contact Management Systems are discussed in detail later in this Power Session.

Notes

3. Communicate with It in a Systematic Way

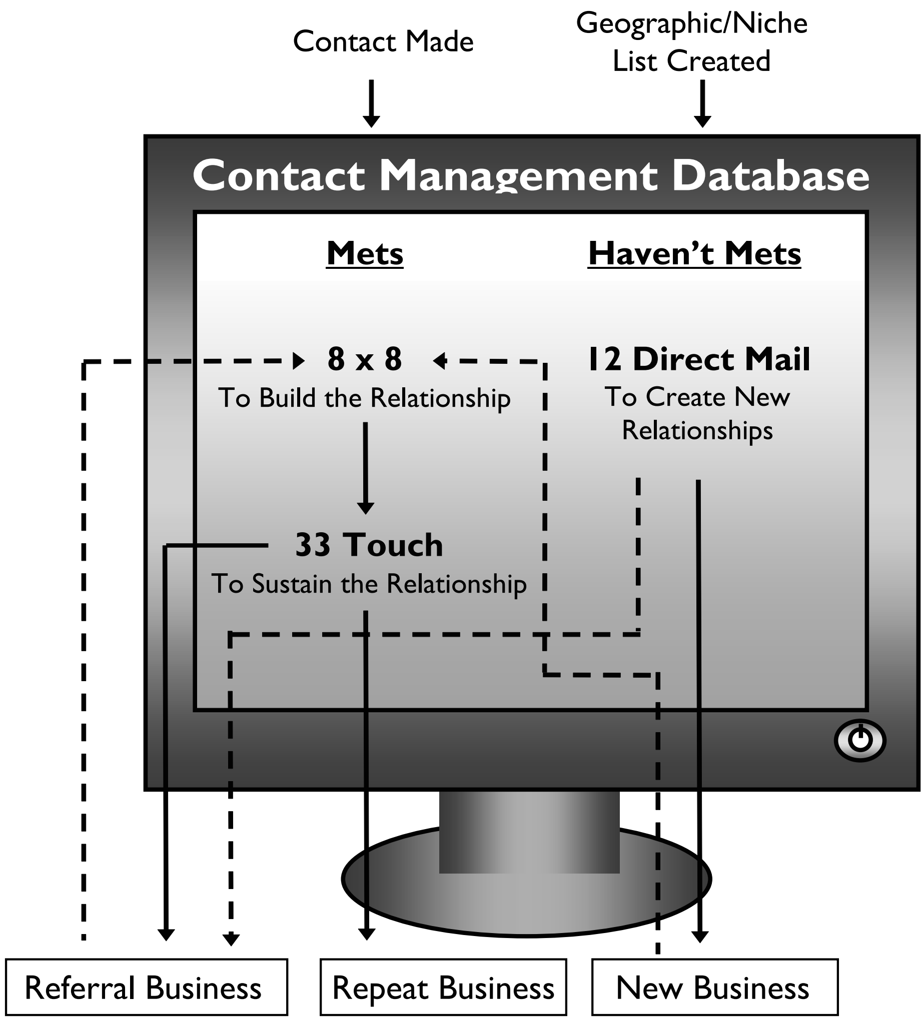
Put Your Database to Work

One Habit

The Power of One principle for 36:12:3 states that you should lead generate for 3 hours every workday. If you work on your database during this time-blocked lead generation time, your database will continue working for you throughout the week, month, and year.

1. **The beginning of the 3 hours** – Use your database to identify and prioritize the appointments, phone calls, letters, postcards, and other activities you need to complete during your lead generation time that morning. If you use a Contact Management System (CMS), it can do this for you automatically. The CMS is discussed later in this Power Session.
2. **The end of the 3 hours** – Update your database while the results of your lead generation activities are fresh on your mind. Add any new contacts you've gotten from your lead generation efforts. Update any existing contact information that has changed.

Overview of Systematic Marketing Plans



By marketing to your Haven't Mets with a systematic 12 Direct Mail marketing plan, some of them will eventually bring you new business and/or referrals. These contacts then become Mets and are included in your Mets database along with the other Mets you've gained through your prospecting activities. Regardless of the source, each Met is initially assigned to a systematic 8 x 8 marketing action plan to build the relationship. Once the relationship is cemented, the Met contact graduates to a systematic 33 Touch marketing action plan to sustain the relationship.

It's important to note that a contact can generate referral business regardless of which systematic marketing plan they are assigned to. Any contact may also lead to new business unless they've already done business with you.

Types of Systematic Marketing Action Plans

The table below provides a brief definition for each type of systematic marketing action plans.

Category	Systematic Marketing Plan	Definition
Haven't Met	**12 Direct**	Direct mail marketing pieces you send out once a month over a one-year cycle (then begins again!).
Met	**8 x 8**	Cements your relationship with eight touches in the eight weeks after you've made contact.
	33 Touch	Maintains relationship with Mets over a one-year cycle (then begins again!).

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 tent to *underdo* it.

For more specific information about implementing basic and customized 8 x 8, 33 Touch, and 12 Direct Plans, please see:

Power Session 5: Working with Mets
Power Session 6: Farming
Power Session 7: Open Houses
Power Session 8: FSBOs and Expired Listings
Power Session 9: Agent-to-Agent Referrals
Internet Lead Generation

Your goal is to "Out-touch" all other agents!

The Benefits of Systematization

1. **Consistency** –Systematized marketing action plans deliver your branding and Unique Selling Proposition in a nearly identical fashion to potential clients every time. It also helps assure that your monthly newsletter goes out on time each month, every month. Customers come to expect it and it sends a strong message about your professionalism.
2. **Predefined** – The scripts, letters, notes, and other mailing pieces you use in your plans are premade. All you have to do is internalize a message once to be able to deliver it countless times. Items that you mail exist as premade templates. You only have to do a mail-merge or fill in the pertinent contact information before sending the piece. You don't have to reinvent the wheel!
3. **Repeatable** – The more you use your scripts for phone calls and visits, the better you will get at delivering them. Once you find printed mailing pieces and items of value that work for you, you can continue to use them to drive business to you indefinitely. Knowing that you will use marketing materials repeatedly over time also allows you to purchase them in greater volume and reduce your cost per item.
4. **Automatic** – If you apply the systematic marketing plans within a Contact Management System, the CMS will automatically prompt you when it's time to do each activity you've assigned in your plan. Once you've decided which marketing pieces to use such as calendars, sports and back-to-school schedules, etc., you can simply put the plan on autopilot.

Keller Williams Marketing Materials

Professional quality, premade marketing materials are available as a free download on the Keller Williams Intranet! You can get

1. 12 Direct plans
2. 8 x 8 plans for Buyers, Sellers, For Sale By Owners, and Expired Listings

To download the free materials:

1. Log on to the Keller Williams Intranet.
2. Go to the **My Information** tab.
3. Click on the My **ProManage** link.
4. Right click on the template you wish to download.
5. Left click on "Save Target As" from the pull-down menu.
6. Save the file to your own computer.

A hardcopy version with samples of all the Keller Williams Marketing Materials may also be purchased from the Keller Williams University website.

Basic 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 you add to your Mets database. The 8 x 8 is a jump start to the longer duration 33 Touch. The 8 x 8 should be:

1. **The entry point** – The 8 x 8 should be the entry point for all Mets in your database.
2. **Applied immediately** – Don't let a new contact or lead linger. For example, that busy HR executive you met at the luncheon should hear from you before she has the chance to forget about the great conversation you had!

The 8 x 8 is a combination of:

1. Personal visits
2. Phone calls
3. Items of value (dropped off or sent)
4. A handwritten note

Basic 8 x 8 Plan

Week 1	Send or drop off a handwritten note with your business card.	**Every single touch should have a quick reminder and instructions on how to give you referral business.**
Week 2	Contact the individual by phone to follow up.	
Week 3	Send or drop off an item of value (see list below for suggestions).	
Week 4	Contact the individual to quickly touch base, ask if there is anything you can do to help, ask for a referral, and ask for an appointment. *Sample script:* "Hello, this is __________ with Keller Williams Realty. Do you have a minute? How are you? Did you 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."	
Week 5	Send or drop off an item of value.	
Week 6	Contact the individual to quickly touch base, ask if there is anything you can do to help, ask for a referral, and ask for an appointment.	
Week 7	Send or drop off an item of value.	
Week 8	Contact the individual to quickly touch base, ask if there is anything you can do to help, ask for a referral, and ask for an appointment.	

Items of Value

Items of value are things you can provide to potential clients that will have meaning and will be important to them. Some suggested items of value are:

Suggested Items of Value			
	1. Facts About Expired Listings		10. Renting vs. Owning
	2. Getting Your Home in Top Selling Condition		11. Security Tips
	3. The Home Buying Process		12. Seven Real Estate Truths
	4. Homeowner's Insurance and Your Credit History		13. Six Selling Myths Uncovered
	5. How to Buy a Great House		14. The Ten Commandments When Applying for a Real Estate Loan
	6. Moving Tips & Checklist		15. Ten Signs It's Time to Sell Your Home
	7. Packing Checklist		16. Ten Steps to Selling Your Home
	8. Helping Children Cope with the Move		17. Ten Steps to Selling Your Home For-Sale-By-Owner
	9. Real Estate Glossary		18. What's Happening in Our Area?

***Note**: These Items of Value are included in the CAMP 4:4:3 Tool Kit*

Customized 8 x 8

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:

- ☑ FSBOs (remember, FSBOs 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 relaunch it)
- ☐ My Demographic Farm(s) (to relaunch it)
- ☐ My Sphere of Influence (to relaunch it)
- ☐ Open House Attendees
- ☐ My Allied Resources
- ☐ Relocations
- ☐ Builders
- ☐ My IVR System captures
- ☐ Other: ______________________________
- ☐ Other: ______________________________
- ☐ Other: ______________________________

☑ *Regardless of other plans you may choose to include, these are must have plans.*

To see examples of specific 8 x 8s for working with Expired Listings, For Sale By Owner, etc., please see the specific Power Sessions in this course related to those topics.

"Get in the habit of getting peoples' business cards. If you establish them on an 8 x 8 early on, you've got it nailed. Personally follow up with past clients. You've got to be prospecting all the time."

Judy Johns
The Judy Johns Family Team
Overland Park, Kansas

33 Touch

Once you have cemented the relationship with an 8 x 8 plan, the 33 Touch picks up where the 8 x 8 left off to nurture and sustain the new relationship.

33 Touch

The 33 Touch is a systematic marketing and prospecting technique that ensures year-round contact with all of the propsects, business contacts, and past clients in your contact database. It nurtures your relationship with the contacts in your database and sustains ongoing communication.

A 33 Touch consists of the following elements:

# of Touches	Description of Contacts
14	A combination of fourteen mailings, letters, cards, emails, 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 you.**

Succeeding through a 33 Touch

The keys to achieving success with a 33 Touch are:

1. **Be Consistent** Complete each and every action included in the 33 Touch plan you are using.

2. **Be Personal** Sending e-mails, direct mail marketing, and even hand-written notes are not enough to get people to do business with you. You must anchor a mental association of your name and face to those touches with personal contacts in the form of either in-person visits or phone calls.

3. **Be Long-term** You are in this for the long-haul. By being persistent in continuing your 33 Touch plans over the years, they will eventually reap huge benefits for your business.

Timothy and Jennifer McKenna, top-producing agents in Henderson, Nevada, understand that patience is a virtue, especially when you're facing slow turnover in your market. "I mean you've gotta remember that the majority of these 33 Touches are people that we've either sold a house to or sold a house for. So, it's gonna take years to see how this works."

"The mistake that a lot of people do is they do one mailing and they sit back and wait for the phone to ring off the hook. And you know, that is not going to happen."

Marvin Jolly
Former Top Agent
Plano, Texas

Mass Mailing

As part of your 33 Touch plans, you will schedule several mass mailings throughout the year (e.g., holiday mailers, 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.

Customized 33 Touch Plans

Like your 8 x 8 plans, you may use various 33 Touch plans depending on what type of prospecting and/or marketing you choose to do. Please refer to chapters pertaining to specific types of lead generation to see specific examples of 33 Touch plans for those types of lead generation.

12 Direct

12 Direct

A 12 Direct program is a series of direct mail pieces mailed to a targeted Haven't Met group at the rate of one piece per month over a cycle of twelve months.

"Direct mail is the least effective method of lead generation if you don't follow up. It's great if you do."

Doris Carlin
The Doris Carlin Team
Joplin, Missouri

Establish a Personal Presence

You will typically send 12 Direct materials to lists of people you haven't met such as a geographic or niche farm. You may also send 12 Direct materials to other agents to generate referral business. 12 Direct materials can take the form of either printed materials to be mailed or hand-delivered, or can be emails. To be effective, however, it is crucial that you establish a personal presence within your target group by personal contacts through phone calls and/or face-to-face visits. Since 12 Direct programs often go to larger groups of contacts, hosting events (like a neighborhood ice cream social for your farm or a networking event for a niche list) is a great way to bring a personal touch to these mailings. The idea is to gradually and consistently convert each Haven't Met into Met.

Once a Haven't Met becomes a Met, you will need to enter them into your Mets database and decide the most appropriate 8 x 8 plan to assign them to.

Branding versus Junk Mail

There is a fine line between promotion and junk mail. Some things to watch out for are:

1. Maintain a physical presence with your target group. If they can't associate what you send with a real person, what you send will likely be thrown away.
2. If you send emails too frequently, they may be perceived as spam and the recipient may block future emails from you.
3. Make sure whatever you send has the most value-add for the recipient as possible.

Systematizing Your Database

Gary and the Box

If you have attended the CAMP 4:4:3 course, you will have seen the *Gary and the Box* KWConnect video. If not, please take a moment to watch it. In the included clips, Gary Keller discusses how he set up a database management system using a black box and a filing system of index cards. Keep in mind, Gary started building and working his database before computers were readily available and affordable.

Gary's story demonstrates that there is no excuse not to start building and working with whatever system is available to you. However, as your business grows, and you begin prospecting and marketing on a grander scale, manually managing all of the touches and other activities associated with your database would become extremely labor intensive and time consuming.

Avoid the Technology Trap

Avoid what Todd Duncan, in his popular book *Time Traps*, calls the Technology Trap.

The Technology Trap

When Technology intended for convenience actually ties us down and steals our time.

The point of having a database is to systematize and automate the way you take action and actively seek business. Whichever system you choose, you don't want to spend a lot of time each day configuring it. **Your database must not become an excuse for not calling your Mets.**

Ready, Fire, Aim! is better than
Ready, Aim, Aim, Aim, Aim …

How Much Time Does It Really Take to Manage Your Database?

Exercise

Find out how much time it really takes to manage contacts in your database.

Directions:

1. Break into small groups of four to six people.
2. Cut along the dotted lines of the two following pages to create 12 separate "index cards."
3. You only need one set of cards per group.
4. Choose a member of your group who has a second hand on their watch to be the timekeeper.
5. Follow the instructor as they tell you how to work with your new "database."

Time: 15 minutes

First Name: Tom
Last Name: Smith
Street Address: 1234 Walnut
Phone: 555-1267
City: Anytown **State:** Ohio
Zip Code: 77445
Contact Type: Seller
Lead Source: Yard Sign
Birthday: January 12

First Name: Elizabeth
Last Name: Connelly
Street Address: 44 Evergreen Trail
Phone: 555-9914
City: Anytown **State:** Ohio
Zip Code: 77447
Contact Type: Buyer
Lead Source: Website
Birthday: February 20

First Name: Mary
Last Name: Wright
Street Address: 9213 Stone Cliff
Phone: 555-2243
City: Anytown **State:** Ohio
Zip Code: 77443
Contact Type: Expired
Lead Source: MLS
Birthday: March 7

First Name: James
Last Name: Green
Street Address: 1717 Chestnut Road
Phone: 555-0097
City: Anytown **State:** Ohio
Zip Code: 77445
Contact Type: FSBO
Lead Source: Referral
Birthday: April 29

First Name: Larry
Last Name: Thomson
Street Address: 5112 Ventura Boulevard
Phone: 555-7800
City: Anytown **State:** Ohio
Zip Code: 77443
Contact Type: Seller
Lead Source: Yard Sign
Birthday: May 2

First Name: Carole
Last Name: Charters
Street Address: 7771 Victory Lane
Phone: 555-0482
City: Anytown **State:** Ohio
Zip Code: 77441
Contact Type: Buyer
Lead Source: Website
Birthday: June 25

Notes

First Name: Victoria
Last Name: Saenz
Street Address: 1191 Oldham Road
Phone: 555-9902
City: Anytown **State:** Ohio
Zip Code: 77441
Contact Type: Seller
Lead Source: Referral
Birthday: July 9

First Name: Victor
Last Name: Rosemont
Street Address: 8912 Lantern Lane
Phone: 555-0034
City: Anytown **State:** Ohio
Zip Code: 77442
Contact Type: FSBO
Lead Source: Yard Sign
Birthday: August 30

First Name: Betty
Last Name: Heinz
Street Address: 6651 Market Street
Phone: 555-1099
City: Anytown **State:** Ohio
Zip Code: 77445
Contact Type: Seller
Lead Source: Yard Sign
Birthday: September 16

First Name: Carl
Last Name: Drake
Street Address: 7788 Barrel Road
Phone: 555-0553
City: Anytown **State:** Ohio
Zip Code: 77441
Contact Type: Expired
Lead Source: Referral
Birthday: October 22

First Name: Sam
Last Name: Murdock
Street Address: 8804 Larchmont
Phone: 555-9939
City: Anytown **State:** Ohio
Zip Code: 77442
Contact Type: Buyer
Lead Source: Seminar
Birthday: November 19

First Name: Nancy
Last Name: Durden
Street Address: 44 Forrest Lane
Phone: 555-3334
City: Anytown **State:** Ohio
Zip Code: 77440
Contact Type: Buyer
Lead Source: IVR
Birthday: December 14

Notes

Database Duties of an Agent

Let's take a look at what duties an agent has to complete when working with a database, manually or not.

1 *Daily Duties*

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

2 *Weekly Duties*

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

3 *Monthly Duties*

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

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

Microsoft Outlook

Most agents will quickly realize the benefits of using some type of computer program to work with their database. Many agents are drawn to Microsoft Outlook because they are already somewhat familiar with it. From a database standpoint, Outlook has many capabilities and limitations. Some of these are:

1. **Email** – Many agents already use Outlook to manage their email and are familiar with its features.
2. **Calendar** – You can schedule appointments and Outlook will automatically give you reminders.
3. **Contact Information** – You can store the names, addresses, phone numbers, and other contact information for everyone in your database. Updating contact information is relatively easy. You can also assign your contacts to numerous contact groups such as buyers, sellers, etc.
4. **Categories** – Outlook allows you to assign multiple customizable categories to your contacts (e.g. John Smith may be assigned to your "Shiloh Rd. 12 Direct" category in addition to having earned the status of "Advocate" for his referrals.
5. **Mail-merge** – Outlook can create a data file of all, or selected groups, of your contacts. You can then use a separate program, such as Microsoft Word, to merge that information to create mailing labels or personalized letters.
6. **Exporting Information** – Outlook can export selected contact information in the form of mailing lists that can be provided to outside vendors for mass mailing. You can also export your entire database to a Contact Management System when you are ready to transition to a more powerful database management tool.
7. **Contact History** – The program provides a Notes field where you can record details regarding your contacts and your interaction with them. This can be a very limiting factor. For example, details like your contacts children's names are stored in the same field with notes about which exact mailing pieces, phone calls, and other touches you've made with your contacts.
8. **Action Plans** – Outlook has extremely limited capabilities to help you automate your 8 x 8, 33 Touch, and 12 Direct action plans. It is possible to flag messages with follow-up reminders. However, each individual activity, such as sending a single postcard, would have to be scheduled *each time* for *each individual* assigned to every one of your action plans.
9. **Personal Digital Assistant** – You can configure Outlook to synchronize with your PDA to upload contact and scheduling information you've added in the field.

> ***Note:*** *Keller Williams Realty International does not provide technical support for Microsoft Outlook. Please consult Microsoft Office Online Help for assistance.*

It's time to use a Contact Management System

What Is a Contact Management System?

As your business grows, the job of manually maintaining your database and scheduling activities can assume monumental proportions. A Contact Management System (CMS) is a computer program that can automatically schedule and track many of the tasks you need to complete in order to do prospecting, marketing, lead conversion, and manage transactions on either a small or massive scale. It can remind you of the priority actions you need to complete each day to successfully seek out business and close transactions.

The Most Popular CMS Programs

A Keller Williams eAgentC survey conducted in October of 2003 revealed that the contact management software programs most favored by Millionaire Real Estate Agents were:

1. TOP PRODUCER
2. Online Agent
3. Sharper Agent
4. Agent 2000
5. Outlook
6. ACT!

Myth

I don't have enough leads to bother with a Content Management System.

Truth

Most agents in the growth phase of their career are managing twenty to eighty leads at a time. With just twenty, it's difficult to keep contact information up to date, as well as scheduling and completing your other lead generation activities. Implementing touch programs without an automated system becomes virtually impossible.

"A contact management system simply records the name, address, phone numbers, and contact information of the individuals, and then puts them into a contact program that automatically causes you to stay in contact and touch those individuals."

Gary Keller
Cofounder and Chairman
Keller Williams Realty Intl.
Austin, Texas

The Benefits of Using a CMS

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

Mimi Patrick
The Gary and Nikki Team
Palm Harbor, Florida

A Contact Management System can drastically reduce the amount of manual work, and therefore time, that you must spend building, maintaining, and getting your database to work for you. A CMS can help you accomplish a huge variety of tasks including:

1. **Action Plans** – You can easily customize 12 Direct, 8 x 8, and 33 Touch plans and assign them to the contacts in your database. **Think of action plans as the equivalent of hiring a $50K per year accountability assistant!**
2. **Marketing Materials** – You can link your 12 Direct, 8 x 8, and 33 Touch plans to preexisting professionally created templates. Your CMS will automatically fill in the appropriate contact information on each item.
3. **Prompts** – Very importantly, the CMS will display a “dashboard” to prompt you each morning with the exact appointments, phone calls, notes, letters, direct mail pieces, and other activities you must complete that day. You can even synchronize your CMS with your cell phone to have text reminders sent directly to you wherever you are.
4. **Contact Information** – You can easily and instantly add detailed contact information to your database. You can import address books from other databases without reentering the information. You can also export your address book for sending mailing lists to third-party vendors.
5. **Contact History** – You can instantly view the history of the contacts you’ve had with anyone in your database.
6. **Calendaring and Appointment Scheduling** – You can schedule all of your appointments in your CMS so you don’t have to use a separate program.
7. **Email Integration and Automation** – Your CMS may automatically receive emails and add them to your database as a new contact. The CMS may also automatically send out emails, one at a time, such as to an 8 x 8 email contact, or for mass mailings.
8. **Lead Sourcing and Tracking** – Once you assign the source of a contact in your CMS, the CMS can track the progress of converting that contact to a closed transaction.
9. **Reports** – The CMS can produce a wide variety of reports so you can analyze the expense and effectiveness of your various marketing plans.
10. **Web-based Software** – A CMS may have the capability to allow you to access your database away from the office through electronic devices accessing the Internet.
11. **Transaction Management** – For little more effort than it takes to set up and operate your database in a CMS, you can track the activities you need to complete to service listings and get transactions through to successfully closed business.

The Key to CMS Success

The following key actions will help you successfully put your CMS to work:

1. **Use It!** – Put your very next contact in your CMS. Import your whole database into your CMS! Your CMS can't work for you if it doesn't have your contacts.
2. **Take Baby Steps** – Many very successful, tech-savvy agents never use all of the features of their Contact Management System. Simply add the contact information for the next person you meet and schedule a follow-up phone call with them. Put them on an 8 x 8 program and let your CMS take it from there. You don't have to start off automatically emailing HTML pages of new listings to your prospective buyers. You can create more sophisticated prospecting and marketing action plans over time.
3. **Listen to It** – Often, agents will simply enter all of their contact information into their CMS and then not use any of the automated features–as if their CMS were simply an Excel spreadsheet. The key to harnessing the leverage of your Contact Management System is to assign action plans and then **let the CMS prompt you about the activities you need to do each morning!** For example, TOP PRODUCER has a feature called Today's Business that, at a glance, lists the priority activities you should complete that day. First thing in the morning you will know exactly who you should call and what items to send as directed by your active 8 x 8, 33 Touch, and 12 Direct action plans.

   Microsoft Outlook also has a dashboard, called Outlook Today, that will display that day's calendar, tasks, and messages. You have to activate the Outlook Today dashboard. It is not turned on by default.

The Advantages of ProManage

Because we believe so passionately in the power a CMS can bring to your agent business, we created ProManage to make it both easy and affordable for you to get started.

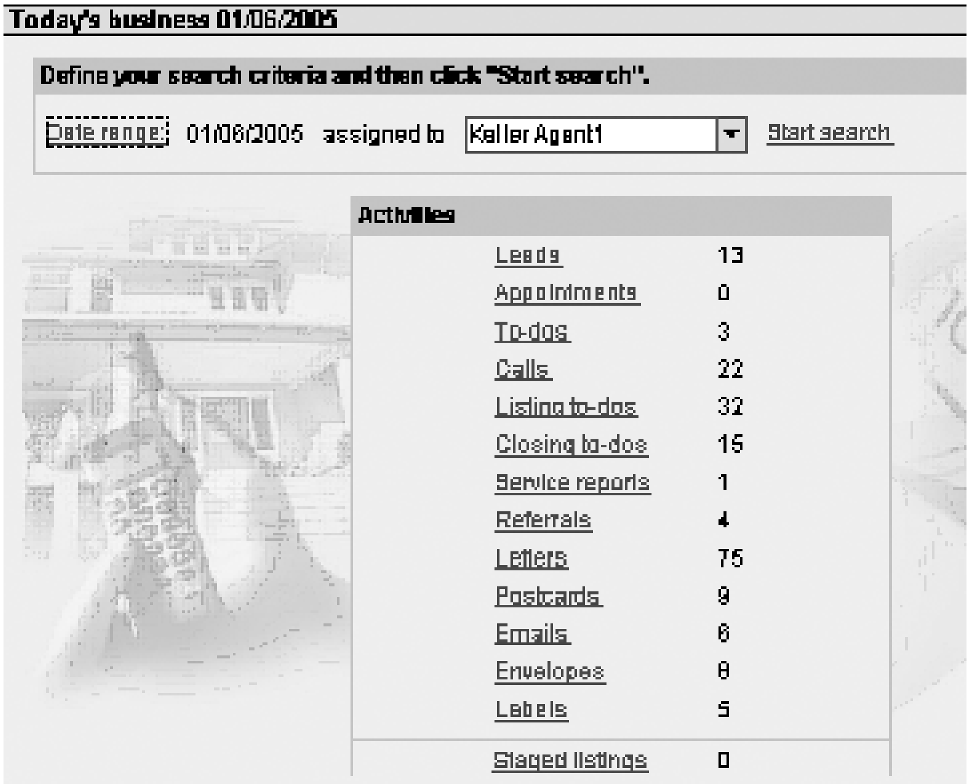
ProManage is a suite of tools incorporating lead generation and contact management products with professionally designed marketing materials and quality KWU training.

The Keller Williams version of the CMS TOP PRODUCER® 7i is the first technical solution to be a part of ProManage. This includes:

1. **Best Pricing** – For TOP PRODUCER® 7i (with a year contract), plus periodic special promotions and pricing only available to KW associates.
2. **Custom Marketing Materials** – Top-of-Class customized Keller Williams 8 x 8, 33 Touch, and 12 Direct templates that already have the Keller Williams look and logo for your letters, postcards, and emails.
3. **Agent Website Leads** – Leads from Agent Websites funnel directly into your TOP PRODUCER 7i database.
4. **Training** – *Your Business Is Your Database* how-to guide available for free download on the Keller Williams Intranet. Additional training is available on KWConnect.
5. **Dedicated Support** – TOP PRODUCER maintains a dedicated support line for Keller Williams associates.

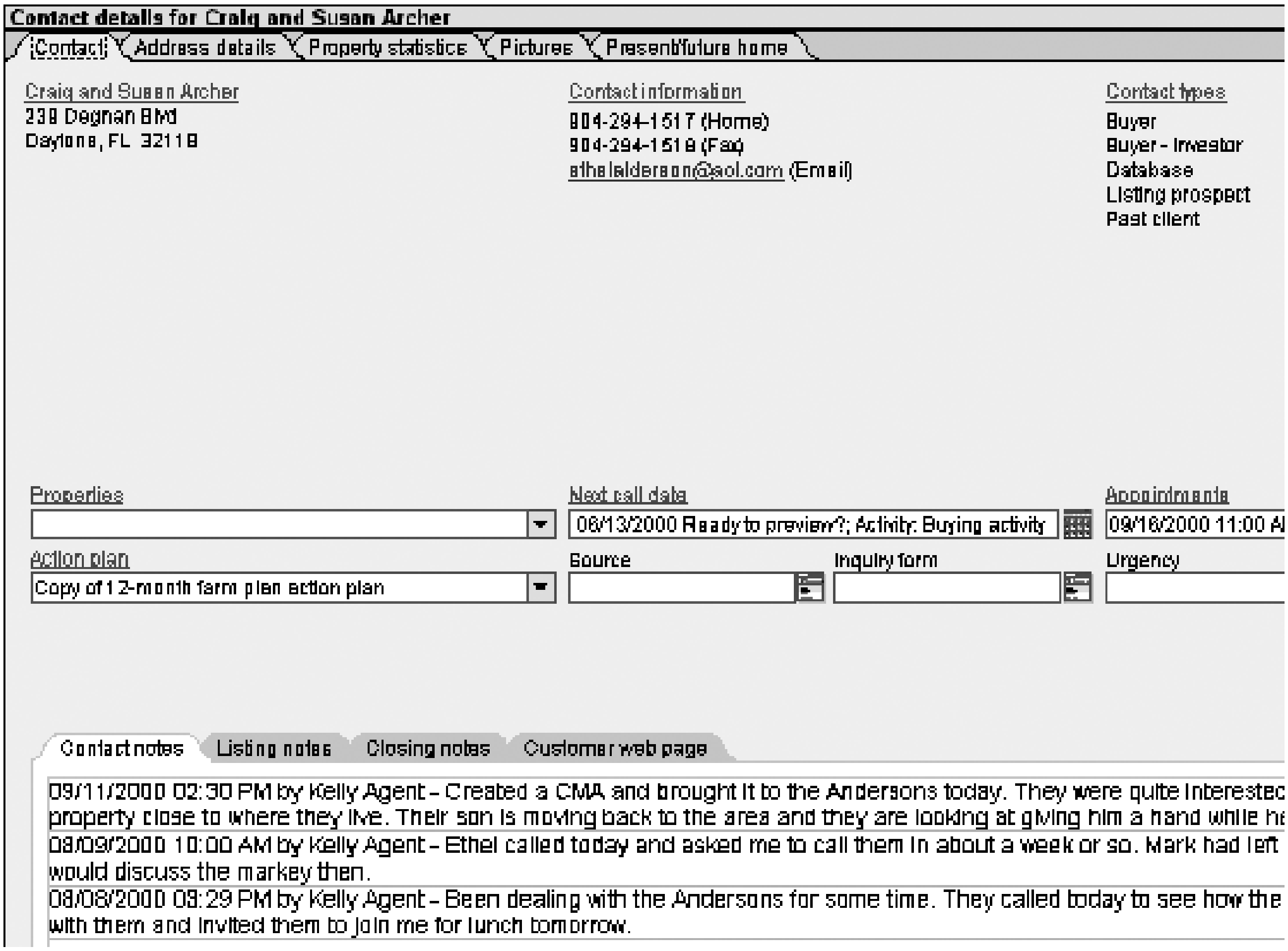
Today's Business in TOP PRODUCER

You can set Today's business to be your start-up page in TOP PRODUCER. This will allow you to instantly view all of the activities you must complete during your lead generation session each day.



Contact History in TOP PRODUCER

TOP PRODUCER also allows you to instantly view the contact history of how you are building your relationship with each person in your database.



Customized Action Plans in TOP PRODUCER

The Keller Williams Realty version of TP 7i comes with several action plans, including the 12 Direct, 8 x 8, and 33 Touch lead generation plans. Keller Williams Realty has even developed customizable marketing material for use in your lead generation plans.

Martin Bouma, of The Bouma Group in Ann Arbor, Michigan, 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: FSBOs, Expireds, prospective sellers …," says Martin. And even with more than 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.

How Do You Get TOP PRODUCER for Keller Williams?

1. **New Users** – Call the TOP PRODUCER sales line dedicated to Keller Williams associates: (866-459-7891)
2. **Already Using TOP PRODUCER** – Contact TOP PRODUCER systems and request to change to the Keller Williams version. (866-337-2658).

Don’t Touch That Delete Key!

Harnessing the power of your contact database takes commitment and consistency—and time. Until you have grown your database (and your business) to the point where you have several thousand people in your Mets database, you really shouldn’t be removing anyone from your database.

What About Unresponsive Contacts?

Over time, you will have some contacts who simply:

1. Have not done any business with you
2. Have not referred any business to you

While it may not make sense for you to keep spending the same amount of time and money on personal touches with them and items of value, you should still keep them in your database. You might still get business from them eventually.

Some ideas for altering your prospecting and marketing approach to unresponsive contacts are to take them off the 33 Touch plan you currently have them on and to:

1. Put them only on a 12 Direct plan that is much less expensive than the items of value you send out on a 33 Touch.
2. Put them on an email-only plan that costs you virtually nothing.

Andy Allen, a top-producing agent with the Allen–Lancaster Team in Austin, Texas, knows the power of staying in touch. “Everybody already has a friend or family member in real estate, right? Difference is, those friends and family members are not calling them every week and asking them for referrals. If you are, you quickly rise to the top and you’re the one who is going to get their business because you’re the only one asking.” Make sure you are the one calling them—just ask Andy.

The Millionaire Real Estate Agent Database

Once you’ve grown your database to thousands of people, you will have earned the right to begin culling contacts from your database who have never given you any business despite repeated, consistent contact with them. In fact, you will need to do this because of the expense associated with the marketing and prospecting activities you are doing at that scale. But until then—don’t touch that delete key!

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 antispam 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. Or create an **Opt Out–Yes or No** field in your database.
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.*

Be courteous always!

Always be courteous to anyone who requests to no longer be contacted. Being rude to someone who asked to opt out can result in a complaint to your broker, your Board of Realtors, or *worse!*

Notes

4. Service All the Leads that Come Your Way

Get on the FAST track

Careful attention to lead tracking and conversion is one of the core disciplines of lead generation. To do this effectively, you need processes that capture leads and track their progress through your business.

Properly following up and tracking your leads will help you:

- Determine what prospecting and marketing activities work for you.
- Determine who is sending you business.
- And, by tracking referrals, you can better reward those who have helped you grow your business and ensure that they will continue to send you clients.

Get on the lead management FAST track:

The FAST System		
1.	**Funnel**	Leads are funneled into a single point of entry for the business.
2.	**Assign**	Leads are assigned to the appropriate plan and/or team members.
3.	**Source**	Leads are sourced in order to calculate the return on investment for various prospecting and marketing activities.
4.	**Track**	Leads are tracked in order to ensure that customers are properly serviced and converted into clients.

If you are focused on generating leads, there will come a time when you will have more leads than you are able to personally handle. This is when you know it is time to leverage talent.

1. Funneling Leads

*"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, Texas

Funneling leads means channeling leads from all your various lead generation sources through a single point of entry into the systems in your business. By funneling leads initially, you will later be able to Source and Track the leads 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

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. Fliers
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.*

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 your database.

Email

Some Contact Management Systems can send and receive business email. For example TOP PRODUCER 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. For example, TOP PRODUCER 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.

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, fliers, 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 your Contact Management System and will automatically create a new contact record for the caller.

"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, Washington

2. Assigning Leads

"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, Texas

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
2. New leads to the appropriate marketing action plan

And if you have a team …

3. Action plan activities to team members

Using Contact Types

You should be as specific as possible in classifying each contact in your database. These fields in MS Outlook or a CMS allow you to perform quick searches of your database to find contacts of a particular nature to send out specific marketing messages. One individual in your database can be assigned multiple contact types. Some of your primary contact types are:

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

In addition, each of these groups can be further divided into contact types (e.g., sphere of influence, past client, etc.). 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.*

3. 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 your 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 your database 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. Open House
6. Farm
7. FSBO/Expired Listings
8. IVR calls
9. Website
10. Magazine ad calls
11. Newspaper ad calls
12. Newsletter
13. Past client (repeat business)
14. Just Sold cards
15. Sponsorship (Little League)

NOTE: *If you advertise in several different magazines or have more than 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.*

"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, Florida

4. Tracking Leads

Tracking a lead begins the moment the lead hits your database. You will track leads as they enter your business, are sourced, are assigned, and are followed up. You may track many aspects of your business, including:

1. Lead follow-up
2. Leads per source
3. Ratio of leads to closed business

Lead Follow-Up

Whether leads are entered manually or funneled from a website or an IVR system, your database should provide a feature for giving you a quick overview of what new leads have entered your business, whether you have followed up with them and how, and what the results of the follow-up were.

Leads per Source

In order to hold your marketing dollars accountable, you should be analyzing your cost per lead. Your database can be configured to give 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*). For more specific information on tracking Leads per Source, please see *Power Session 3: Marketing.*

Ratio of 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 your database, 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.

Final Thoughts

A powerful contact database can help you grow your business to astonishing heights while actually reducing the amount of manual activities you must complete. Just remember the Four Laws:

1. **Build a database** – If you don't currently have a database, build one immediately. Put every single person you know in it.
2. **Feed it every day** – Follow the CAMP 4:4:3 principle and go get 10 new business cards each and every day. Conduct the lead generation activities that work best for you to get new contacts. Update contact information as soon as any changes occur.
3. **Communicate with it in a systematic way** – Use a contact management system and place each new contact on a systematic marketing action plan such as an 8 x 8, 33 Touch, or 12 Direct immediately.
4. **Service all the leads that come your way** – Funnel each lead to a single phone number for your business. Assign an action plan right away. Record the source of the lead so you can see where your business is coming from. Track each lead to take it from first contact to a closed transaction—then repeat!

"That shoebox of leads turned into a monster. With a database, it never gets bad."

Gary Keller
Cofounder and Chairman
Keller Williams Realty Intl.
Austin, Texas

Notes

Putting It All Together

Power Session Aha's

Your Lead Generation Action Plan

Your success in the discipline of lead generation is dependant on your daily habit of action. If you focus your actions, you will propel yourself forward to 36 transactions or more per year.

Use the Action Planning Worksheet on the following page to record numbers from both your current lead generation program and your future goals. Then determine what actions you will take to "close the gap" (if any) between your current state and your goals.

These are your focused actions. When specifying them, consider:

- Adopting lead generation activities that complement each other and suit your behavioral style and interests.
- Mastering at least three reliable lead generation activities that you will be able to rely on in your business.
- Tracking your results with each activity and continuing to add new activities over time.

Note next to each activity how often you will conduct it—is it daily, weekly, or monthly?

Lead Generation Action Planning Worksheet			
	Current as of ____________	Goal by ____________	Activities to "Close the Gap"
Annual GCI:			
Annual Closed Transactions:			
Do I Have a Database?			
Number of Mets in Database:			
Number of Mets Added to Database (daily)			
Am I Applying Marketing Action Plans to Each Contact?			
Am I Using a Contact Management System?			
Am I Using the FAST System for Every Lead?			

The 3-Hour Habit

The Power of One

Focus on just one thing—lead generation.
Develop one habit—3 hours of lead generation every single workday.

Of the activities listed on your Lead Generation Action Planning Worksheet, which will you add to your calendar for this week?

By adding items to your calendar, you are time blocking. Time blocking means that you always know what your most important job is every day and that you commit to getting it done. It means that you are going to do what you must do: generate leads. You're going to call and meet people, prepare marketing materials, network, host open houses, and prepare seminars. And it means that whichever of these actions you decide to focus your efforts on, you are going to get really good at them over time.

There are just three simple rules you must follow to put the powerful daily habit to work for you. But beware that these must be adhered to and not taken lightly.

1. Time block 3 hours every workday before noon.
2. No skipping. If you must erase, then you must replace.
3. Allow no interruptions (unless they truly are emergencies).

Time on the task beats talent every time. And when you follow these three rules, you're making sure you put in the right amount of time on the right task.

Use the calendar on the following page to time block your lead generation activities. What did you learn during today's Power Session that you would like to incorporate into your regular lead generation program? What did you list on your Lead Generation Action Planning Worksheet that you can start doing?

This calendar is your flexible draft. Sketch out how you will handle your time here. Then, add these activities to your real calendaring system—whether it's an electronic calendar, like Microsoft Outlook, or a paper-based calendar.

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
8	8	8	8	8	8	8
9	9	9	9	9	9	9
10	10	10	10	10	10	10
11	11	11	11	11	11	11
12	12	12	12	12	12	12
1	1	1	1	1	1	1
2	2	2	2	2	2	2
3	3	3	3	3	3	3
4	4	4	4	4	4	4
5	5	5	5	5	5	5
Evening	Evening	Evening	Evening	Evening	Evening	Evening