

K E L L E R W I L L I A M S R E A L T Y

kw|Technology

Increase Your Database IQ and Make It Work For You

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Session #14I



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- ❖ KWU International Master Faculty
- ❖ Has enhanced more than 4,500 websites for real estate agents
- ❖ www.michaeltritthart.com



Increase Your Database IQ

Truth

Your database is the engine that drives your business.



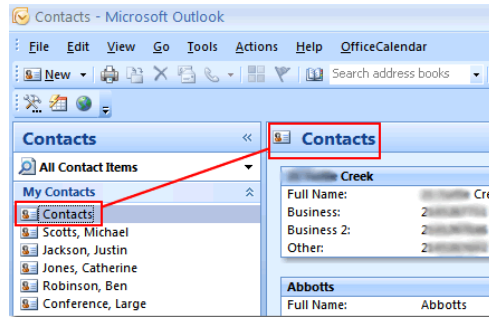
Increase Your Database IQ

Make Your Database Work For You

1. Build and feed your database.
2. Clean up your database.
3. Organize your database systematically.
4. Automate your database activities.
5. Be aware of database do's and don'ts.



1. Build and Feed Your Database



My Database

Name	Phone	Email	Mailing address	Connected on social media*
1. Franny Friend	555.1234		123 Main Street	FB
2. Allie Resource	555.5678	allie@resource.com		
3. Nick Neighbor				
4.				

Consolidate your contacts in one place



1. Build and Feed Your Database

The screenshot shows the myKw myContacts interface. The 'Contacts' menu is open, and 'Import/Export' is selected. The 'Import Contacts' section is active, showing instructions for importing a CSV file. A red box highlights the 'Custom Import Template' link. A large text box on the right contains the text: 'Use the eEdge Custom Import Template'.

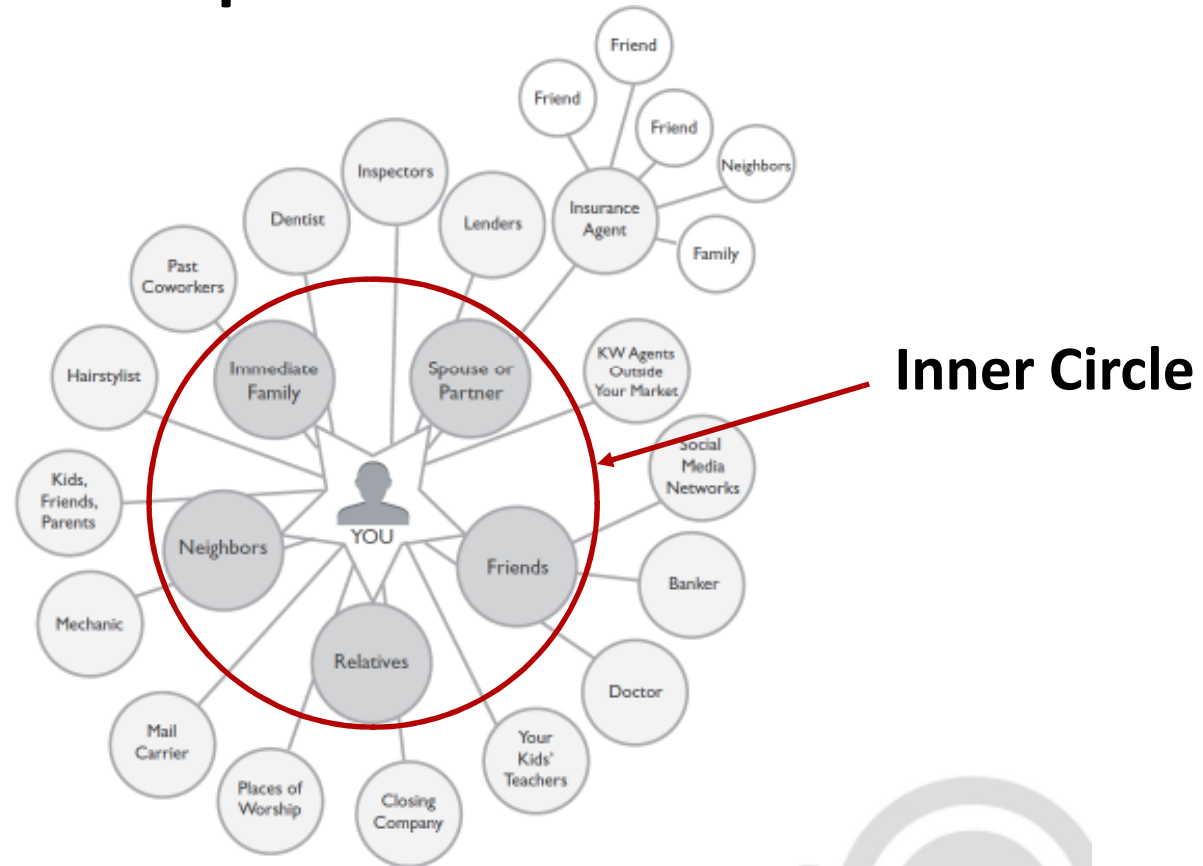
Use the eEdge Custom Import Template





1. Build and Feed Your Database

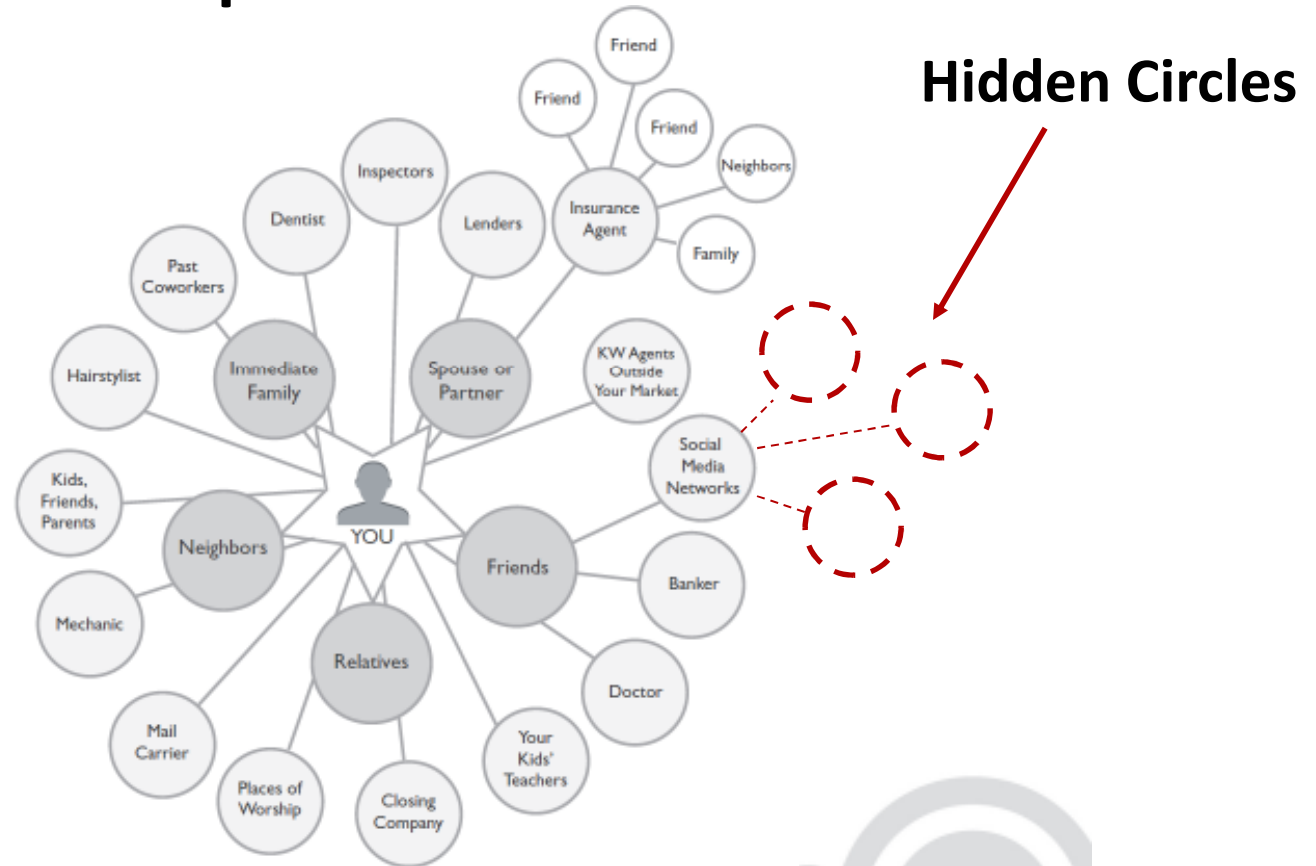
Your Sphere of Influence





1. Build and Feed Your Database

Your Sphere of Influence





1. Build and Feed Your Database

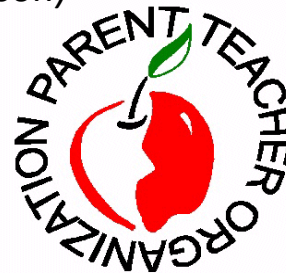
Lead Sources



Customer service providers
(Mike Brodie)



Neighborhood events
(Tommy Thompson)



PTO or parents of your child's friends/teammates
(Carolyn Thompson and Todd Kough)



Fellow members of volunteer organization
(Juli Lieberman Clifford)



1. Build and Feed Your Database

More Lead Sources



Open house visitor registration on iPad
(Kris Reid Coutant)



Send property inquiry callers to eEdge website
(Christina Sanchez Hood)



Comments on your Facebook posts
(Carolyn Thompson)



Facebook ads
(Caroline Simmons)



2. Clean Up Your Database

1. Verify that information is current.
2. Complete missing information.
3. Combine duplicates.

My Database				
Name	Phone	Email	Mailing address	Connected on social media*
1. Franny Friend	555.1234		123 Main Street	FB
2. Allie Resource	555.5678	allie@resource.com		
3. Nick Neighbor		nick@neighbor.com	1212 Maple Lane	FB LI
4.				



2. Clean Up Your Database

How to Fill in the Blanks



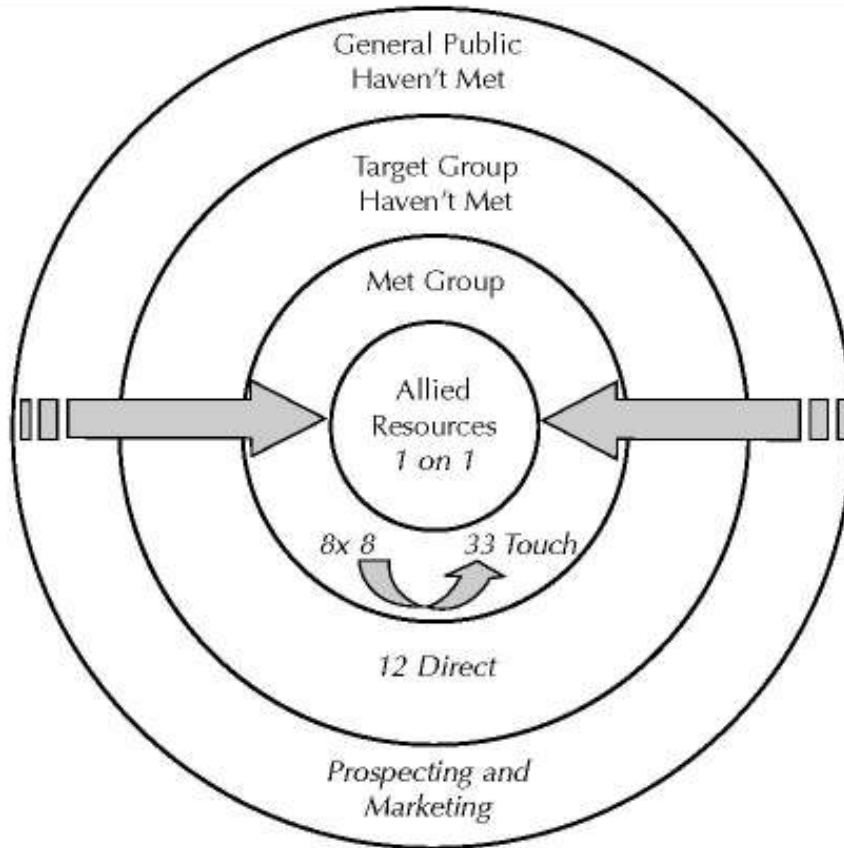
My Database				
Name	Phone	Email	Mailing address	Connected on social media*
1. Franny Friend	555.1234	[Redacted]	123 Main Street	FB
2. Allie Resource	555.5678	allie@resource.com	[Redacted]	[Redacted]
3. Nick Neighbor	[Redacted]	nick@neighbor.com	1212 Maple Lane	FB LI
4.				





3. Organize Your Database Systematically

Strategic Model for Generating Leads and Building Relationships

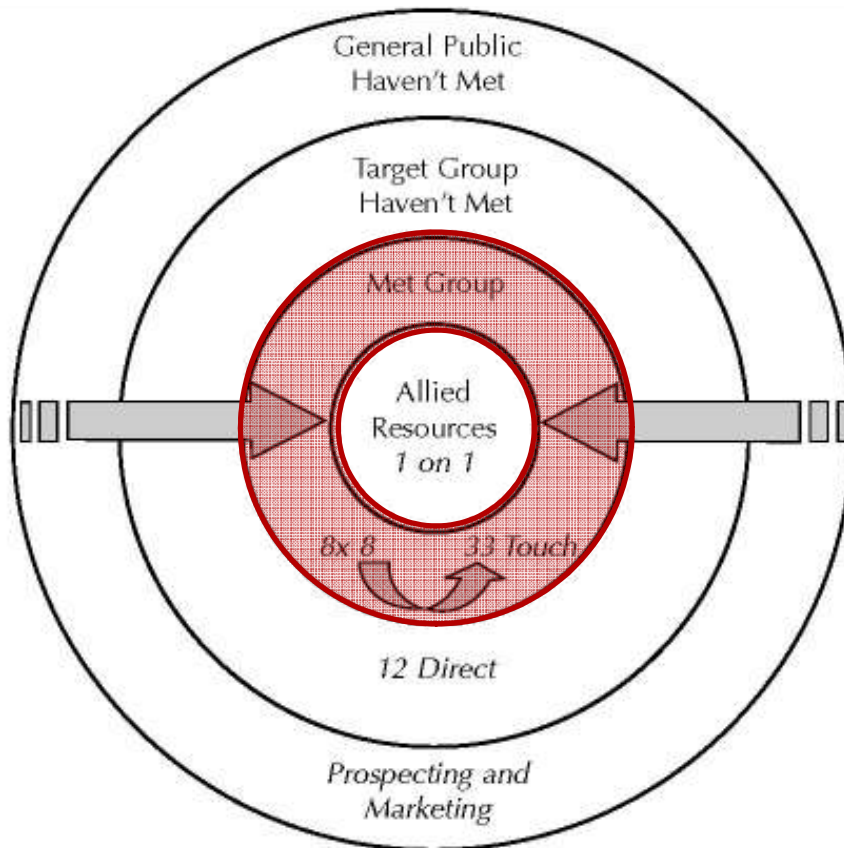


Your Strategy –
Generate leads and
move people into
your Inner Circles



3. Organize Your Database Systematically

Strategic Model for Generating Leads and Building Relationships (cont.)

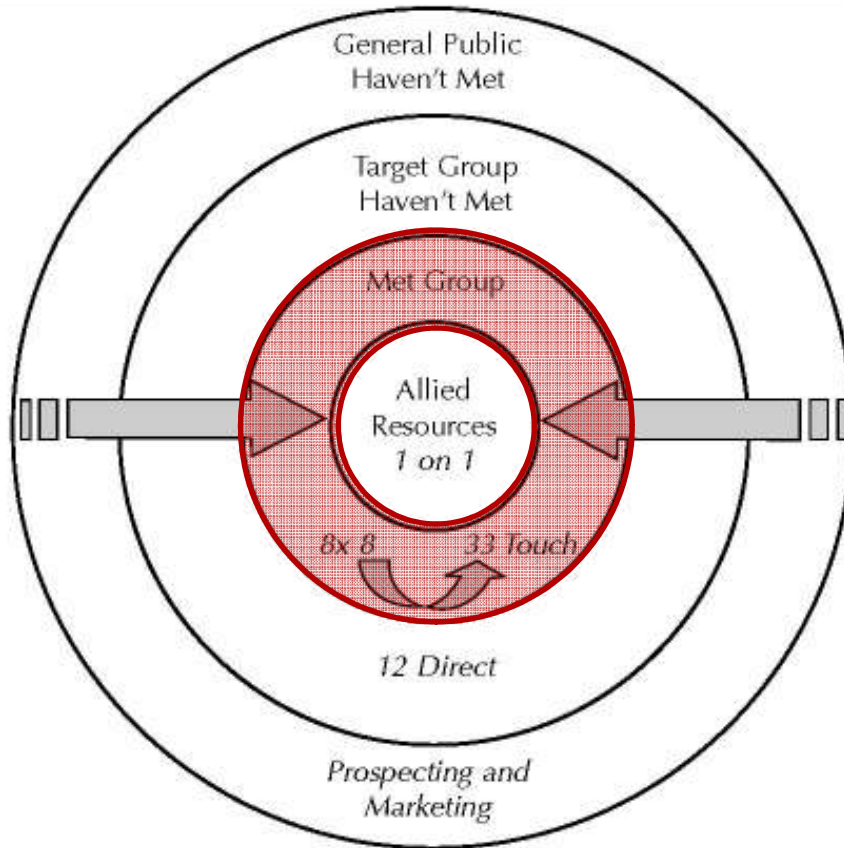


Everyone in your **Met Group** first goes into an **8 x 8** program.



3. Organize Your Database Systematically

Strategic Model for Generating Leads and Building Relationships (cont.)

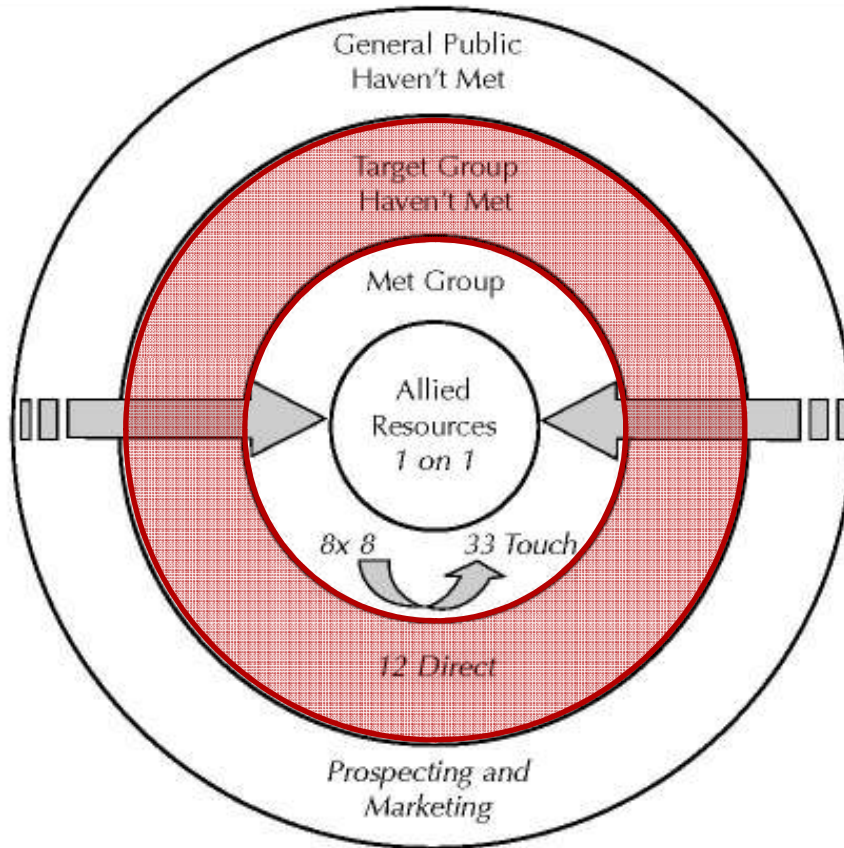


Next, put **Met Group** on a **33 Touch** program.



3. Organize Your Database Systematically

Strategic Model for Generating Leads and Building Relationships (cont.)



Put your **Target Group** on a **12 Direct** program.



3. Organize Your Database Systematically

Break Out Your Contacts into Groups

8 x 8 Buyers

Name	Phone	Email	Mailing address	Classified as (social media)?
S. Susan Wood	610.1234		1234 Main St	FB
T. Mike Kanner	610.5678	456@domain.com		
A. Hank Nighan		789@domain.com	1011 Maple Lane	FB, LJ

33 Touch

Name	Phone	Email	Mailing address	Classified as (social media)?
S. Susan Wood	610.1234		1234 Main St	FB
T. Mike Kanner	610.5678	456@domain.com		
A. Hank Nighan		789@domain.com	1011 Maple Lane	FB, LJ

8 x 8 Sellers

Name	Phone	Email	Mailing address	Classified as (social media)?
S. Susan Wood	610.1234		1234 Main St	FB
T. Mike Kanner	610.5678	456@domain.com		
A. Hank Nighan		789@domain.com	1011 Maple Lane	FB, LJ

12 Direct

Name	Phone	Email	Mailing address	Classified as (social media)?
S. Susan Wood	610.1234		1234 Main St	FB
T. Mike Kanner	610.5678	456@domain.com		
A. Hank Nighan		789@domain.com	1011 Maple Lane	FB, LJ





3. Organize Your Database Systematically

Create Groups in eEdge myContacts



Contacts

Create New Groups:

Group Name ▲

- 12 Direct
- 33 Touch
- 8 x 8 Buyers



3. Organize Your Database Systematically

Import Contact Groups into eEdge

Import Contacts | Export Contacts | Export Messages

You can import contacts listed in a CSV (comma separated values) file.
You can upload an unlimited number of lists, but the total number of rows per list
When complete the page will refresh with a message indicating the upload has c

1. Assign a group to imported contacts:
2. Set contact status:
3. Set contact type:
4. Select a CSV file to upload

Import File Type:

The file must contain data in the following order (fields in bold are required):
Secondary Gender, Family Members, Birthday, Anniversary, Referral Info, Hom
Baths 2, Price 2, SqFt 2, Acres 2, Title 3, Address 3, City 3, State 3, Zip 3, Cou

Note: **First Name**, **Last Name**, and **Email Address** OR **Physical Address** are i

A template of this format can be downloaded here: [Custom Import Template](#)

Please review your file for contact information accuracy **before** importing.

Select File to Upload:

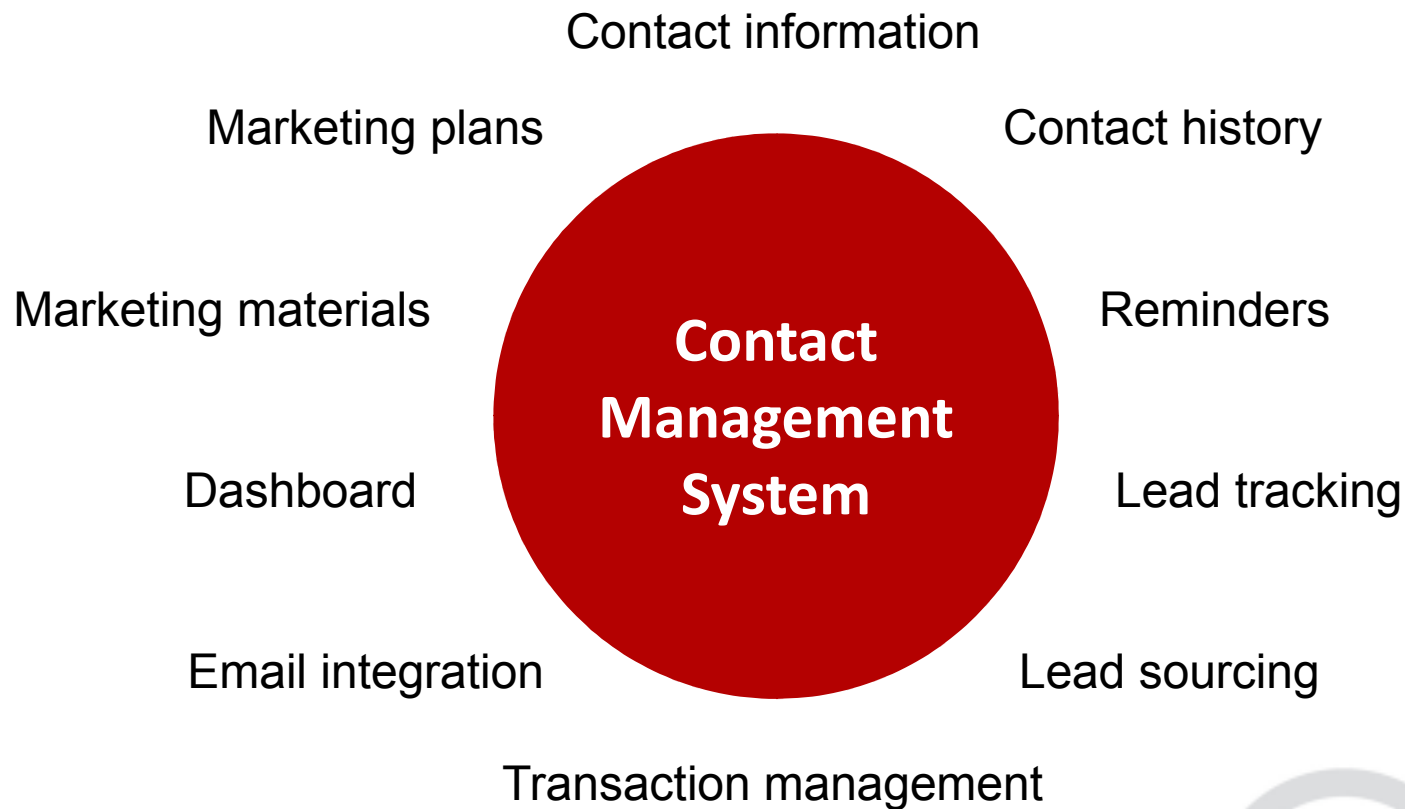
8 x 8 Buyers

Name	Phone	Email	Address	City	State	Zip
1. Empty Field	555-555-5555		123 Main St		CA	90210
2. All Fields	555-555-5555	abc@domain.com	456 Main St	San Jose	CA	95131
3. Partial Fields		xyz@domain.com	789 Main St	San Jose	CA	95131





4. Automate Your Database Activities



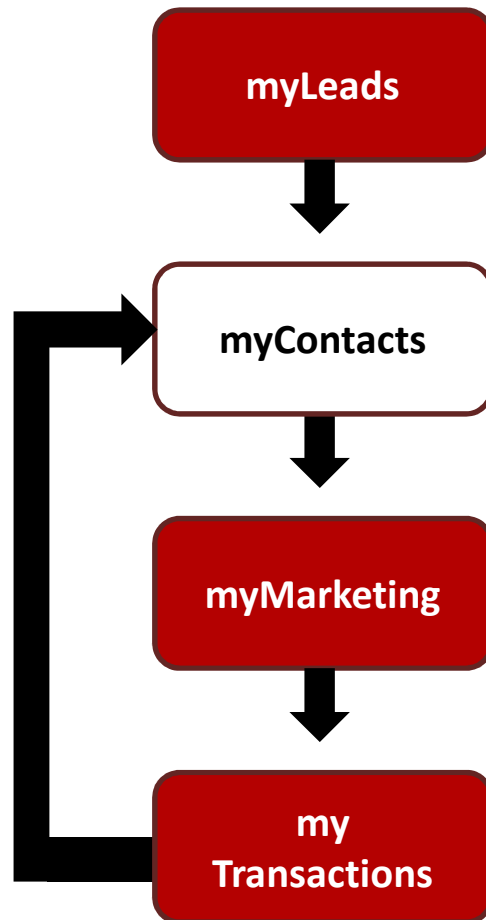


4. Automate Your Database Activities





4. Automate Your Database Activities



- Easy to retrieve, edit, and add contact information and history
- Integrates contact database with lead capture, marketing activities and sales transactions
- Prioritizes your activities and prompts you when it is time to complete them



5. Be Aware of Database Do's and Don'ts

Do

1. Immediately put new contacts on touch programs.
2. Hold your database accountable; track the source of your leads.

Don't

1. Send spam.
2. Delete anyone from your database until it's large enough to warrant it.



Downloads

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