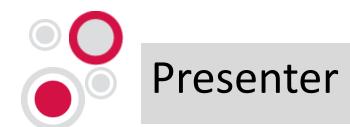
KELLER WILLIAMS REALTY kw Technology

## eEdge: Making the Most of Marketing to Your Contacts

### with Michael Tritthart





### **Michael Tritthart**

- One of two 2011 Trainers on eEdge Roadshow
- Conducted 17 Roadshows & My Transactions Sessions in 12 Regions Last Year
- Full time instructor/webmaster at Plano, Texas MC
- Investor in Little Rock, Arkansas and Fairfax, Virginia Market Centers
- KWU International Master Faculty
- Has enhanced over 4,500 websites for real estate agents
- www.michaeltritthart.com







What you will learn today...

## **Checklist for myMarketing**

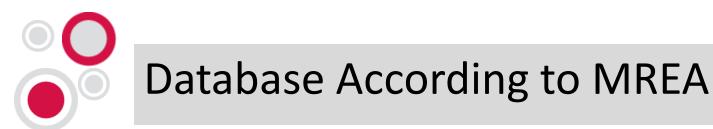
- 1. Database According to MREA
- 2. eEdge Groups for MREA Model
- 3. Transition to the New myMarketing

## Sneak Peek

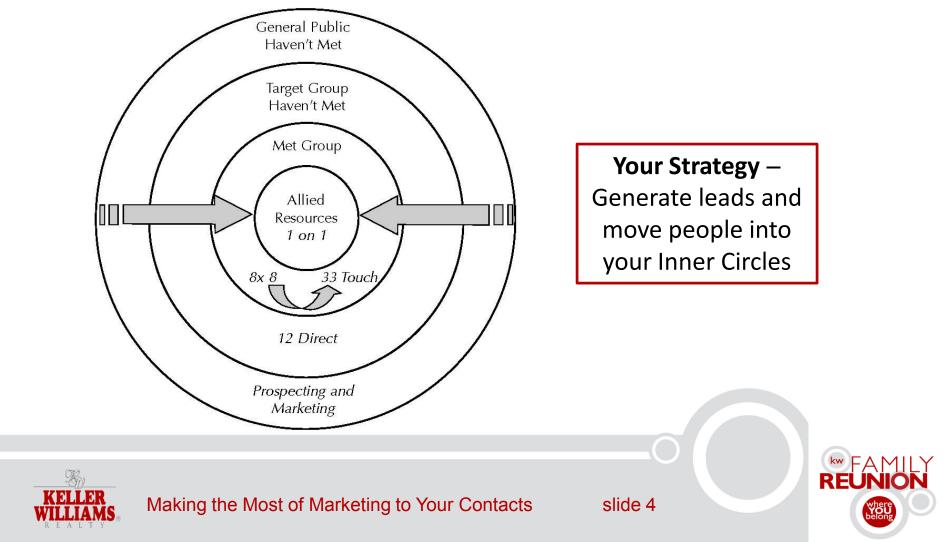
- 1. The New myMarketing
- 2. Action Plans

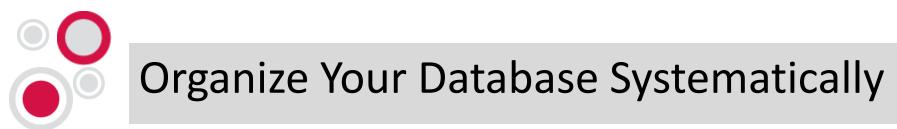




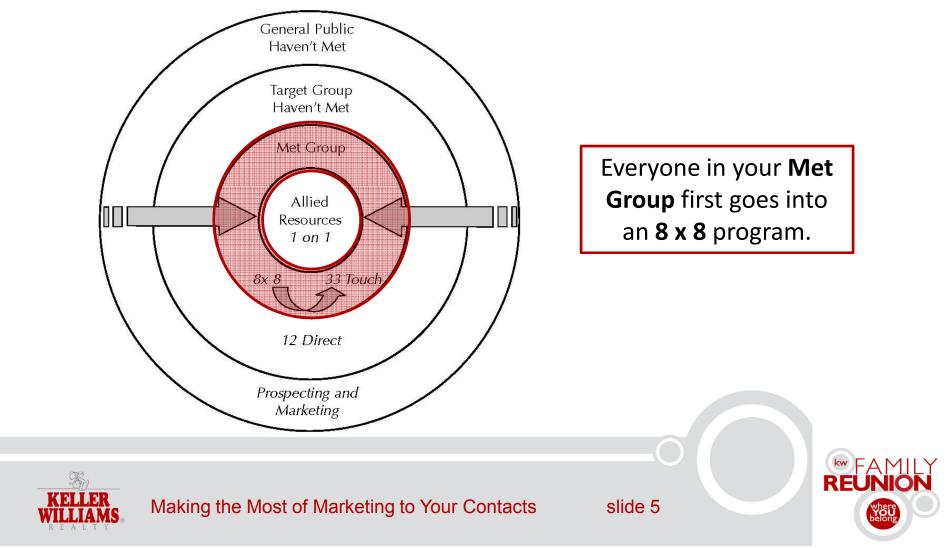


**Strategic Model for Generating Leads and Building Relationships** 



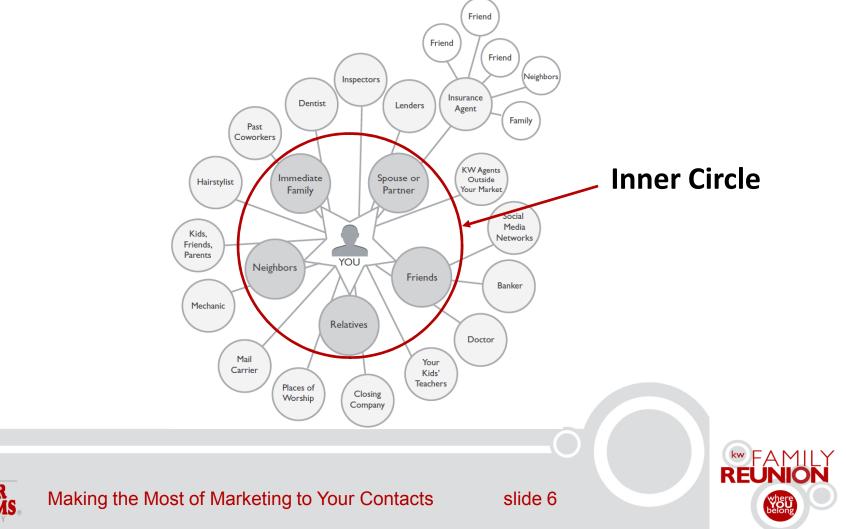


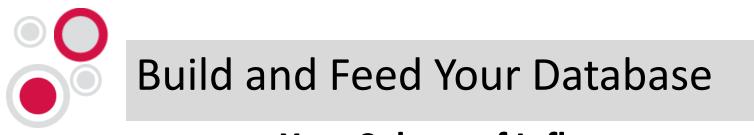
Strategic Model for Generating Leads and Building Relationships (cont.)





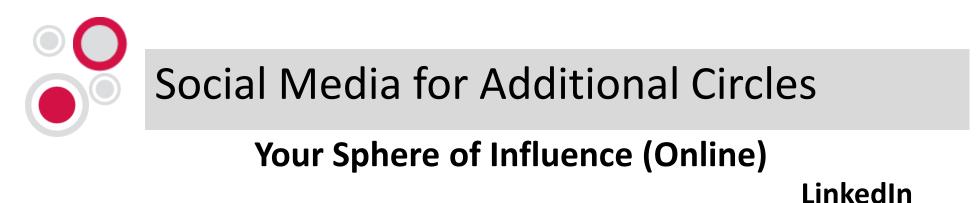




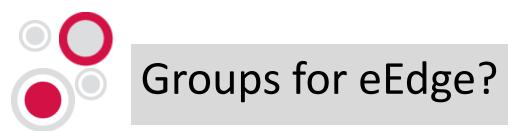


### **Your Sphere of Influence**

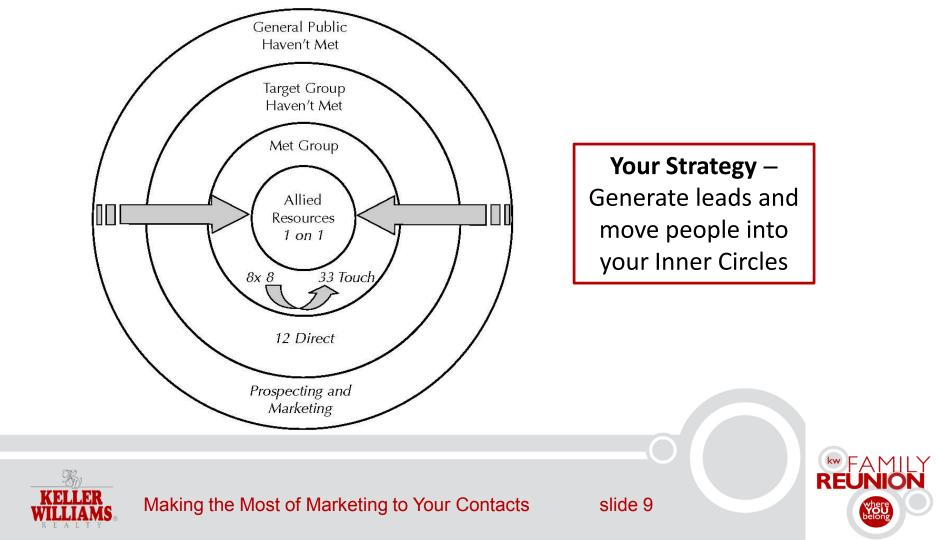








**Strategic Model for Generating Leads and Building Relationships** 





## Create Groups, Re-visit Group Names

Contacts			Find Conta	act <u>Advanced</u>
	<u>Seller's Market Report</u>	Add a Contact	<u>Manage Groups</u>	Import/Export
Create New Groups:	Save			
Group Name 🔺		# Contact	s Actio	ons
Allied Resources		<u>0</u>	8	2
Buyers		<u>0</u>	8	2
Have Not Mets General Public		<u>0</u>	8	2
Have Not Mets Target Group		<u>0</u>	8	2
Mets		<u>0</u>	8	2
Sellers		<u>0</u>	8	2
KELLER WILLIAMS Making the Most of Marketing to Yo	ur Contacts	General Haven' Target Haven Met C Alli Resou 1 or 8x 8 12 D Prospect Marke	t Met Group 't Met iroup ed irces n 1 33 Touch	



## **New Functionality**

\*\*Based on new functionality, it is no longer necessary to link Groups with Campaigns in the same way as before\*\*

- According to MREA, people that you haven't met would go on a 12 direct (Have Not Mets General Public)
- As soon as you meet someone they go on an 8 x 8 (Have Mets Target Group)\*\*\*
- 3. After the 8 x 8 they go to a 33 touch. (Mets Group)

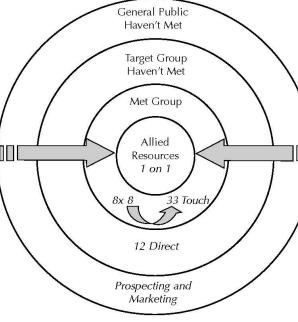






## Back to MREA, Contacts move Groups

### "Have Not Mets General Public", "Have Not Mets Target Group", "Mets", "Allied Resources"









## eEdge for Allied Resources

Contacts (138)	Status: All 💌		Gro	ups: Allied Reso	ources 🔶	Туре	e: All 💌	
Contact	Member Agent	Looking In	Phone	Туре	Source	Created	Activity 🔻	Time Frame
Jeffrey Allen	The Team 💌			Buyer	Entered/Imp	4/11/11	-	Just Looking
Hussain Hashim	The Team 💌			Buyer	Entered/Imp	4/11/11	-	Just Looking
Jason Leandra	The Team 💌			Buyer	Entered/Imp	4/11/11	-	Just Looking
Ashley Drake Gephart	The Team 🔹			Buyer	Entered/Imp	4/11/11	-	Just Looking
Mike Cassidy	The Team 💌			Buyer	Entered/Imp	4/11/11	-	Just Looking
Allyson Coe	The Team 💌			Buyer	Entered/Imp	4/11/11	-	Just Looking

#### Groups and Campaign Connections are Different, but Easy to Do





### \*Add to Group, Add to Campaign at the Same Time\*

Benderin

Timeframe:	Just Looking	1000 CO. 100	Listings () More Actions	6 AM
Moving From:	Just cooking		Add New Listing Alert	
Looking In:	Flower Mound		Start myTransaction	1
ListingAddress:	On	88 532 37 37 939 993	🐺 Add to Campaigns	[
Edit This field is required		55 838 10: enstaging(	🖷 Print	
Recommendations <ul> <li>This contact appealisting alerts.</li> </ul>	ars to be new. We recommend you send	enstaping r d an er cribed to Ale	C Export V-Card Resend Welcome Email	she would like
Show All				
Commonte				
Comments				
Emails	Add a new reminder			
	Add a new reminder			
M <u>Emails</u> M <u>All Reminders</u>				
Emails All Reminders All Reminders Groups This is the list of groups	ips currently assigned to this contact	Actions		



## Imports Should Already Be Segmented

			HOM	1E EDUCATION	COACHING	MARKETING TECHNOL	OGY RESOURCES	EVENTS	REPORTS
			mykw eEdge	🖣 Leads	Marketing	S Transactions	Contacts	실 Email	Search myKW
		m	yContacts	nee teaaci.		Welcome Brei	nda Marshall at Kelle	r Williams Real	lty International MC#0 [Le
Dashboard Inbox 🔻	Contacts 🔺 Mar	ket My Listings 🔻 Search	MLS Create Marketing	Admin 🔻 🕜	Help 🔻				
Contacts	All Contacts								
	Recent Activity								
Import Contacts Exp	Add a Contact	Messages							
You can import contacts	Manage Groups	separated values) file.							
You can upload an unlin When complete the pag		the total number of ro sage indicating the up	ws per list can not exceed load has completed.	10000 rows. The f	file size must be l	ess than 10MB. The file u	pload process could	take several n	inutes depending on you
1. Assign a group to im	ported contacts Se	lect Group							
2. Set contact status	ead 💌								
3. Set contact type Buy	/er 💌				Use <sup>•</sup>	the eEc	dge		
4. Select a CSV file to u	ıpload						.90		
Import File Type: C	ustom CSV 💌				Custo	om Imp	ort		
Secondary Gender, F	amily Members, Birt	hday, Anniversary, Referral	equired): Title, <b>First Name</b> , Info, Home Phone, Work Pl Zip 3, Country 3, Status 3, F	hone,		-		s 1, Baths I	e, Secondary LastName, S 1, Price 1, SqFt 1, Acres 1, Notes, Password
			Iress are required. For example		Te	emplate	2	· · · ·	esent. Contacts without a
A template of this for	mat can be downloa	aded here: <u>Custom Import</u>	Template						
Please review your fi	le for contact inform	ation accuracy <b>before</b> impo	orting.						
Select File to Upload	d: Choose File No f	ile chosen							
Import									
						C			
	-								REUNION
RELLER WILLIAMS REALTY	Makin	g the Most of	Marketing to Y	our Cont	tacts	slide 15			where belong



### Start a Campaign in 3 screens..Less Than Before



Build a New Campaign 🕨					New to cam	paigns? Watc	h the video ►
Basic Advanced						Manage F Accor	
Name 🔻	Туре	Activities	Emails	Direct Mail	Next Delivery Date	Contacts	Actions
Homeowners Newsletters	? Interval	2	12	0	Inactive, Add contacts	0	0
Go Green Series	? Interval	2	3	3	Inactive, Add contacts	0	



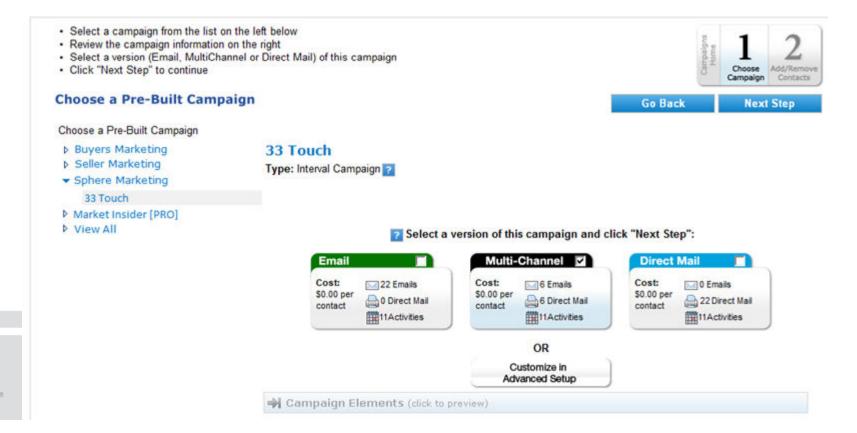
Making the Most of Marketing to Your Contacts





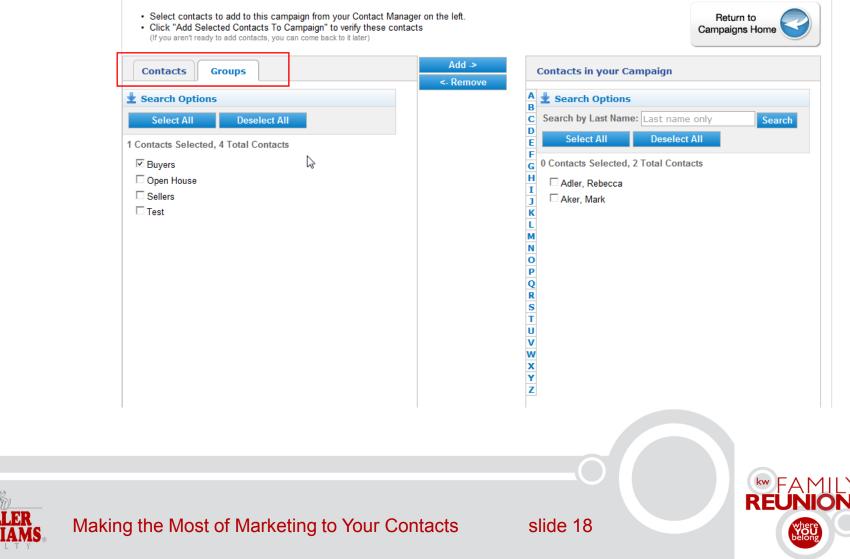
## Start a Campaign







### Start a Campaign





Leads	Powered by Ma	rket leader.					Welcome Ellen	Smith at I	Keller W
ashboard	22. US 12. US	18 18 UL 2	Market M	y Listings ▼	Search ML	S Cr	eate Marketing 🔺	Admin <b>v</b>	<b>(2)</b> F
🙌 Dash	nboard						arketing Materials ampaigns		
ew Leads (2 ontacts that a	) re still in the "le	ead" category a	and need a	action.			le Manager		<u>View al</u>
ontact	Looking In	Avg Price	View	Save	Created 🔻	A	xpiring Materials retiring May 31, 201	2) Acti	ons
arvey Moore		\$0	0	0	7/13/11		Lead 💌	i (	<b>i</b> 9
ndy Keller		\$0	0	0	3/23/11		Lead 💌	i	2
							Display Fewer	🕀 Displa	y More
ew message hese are emai	<b>s (0)</b> ils you have re	ceived from co	ntacts that	need action					<u>View al</u>
ontact	Message						Date 🔻	Actions	





Disk space in use:	s My Pictures		
space in use:	1% full		
- Bir)			REUNION
KELLER WILLIAMS R E A L T Y	Making the Most of Marketing to Your Contacts	slide 20	where beions



		ormance Evaluator My Account			
ings	Profile Deta	ills			
ng and Shipping	Name*:	Ellen Smith	Title:		
	Login*:	ellen	Password:	Change Password	
	Designations:		License/DRE:		
	Website:	servingyourtown.com	Team:		
	eEdge Email:	ellen@servingyourtown.com	Phone	(425) 123-4568	
	External Email*:	ellensmith@gmail.com	Number:	(425) 555-1212	
	Marketing Marketing Email:	ellen@servingy com 💌	Marketing s Website:	ervingyourtown.com	
	Call to Action:				
	Branded Disclaimer:		Unbranded Disclaimer:		
	Blog v URL:	myblog.com	None	acebook.com/mypage	
		123 Main St	Blog Facebook	🖾 Realtor Logo	
	Address:	Kirkland WA 💌 12345	Linkedin Twitter	Equal Housing Logo	
	Additional 1	nformation			



### **Sneak Peek:**

www.kellerwijjams.com Yeller Williams Reaty | 4525 S. Broadway, Suite 200 | Scottsdale, AZ \$5250

Equal Housing Opportunity. If you have a brokerage relationship with another agency, this is not intended as a collectation. All promotion deemed

regable but not guaranteed.

Keller Williams Realty | 4525 S. Broadway, Suite 200 | Scottsdale | AZ | 85250

Add <u>strainer@kw.com</u> to your safe senders list. <u>Click here for directions</u>

To unsubscribe Click Here Click Here for print version

Connect with me on:



#### Call Me Today!

ຝ

Elise Trainer, GRE ABR Realtor Office: (480) 955-3200 Mobile: (480) 422-8896 etrainer@kw.com



R

#### A beautiful home with exquisite craftsmanship, act now!



3645 East Hampden Avenue Denver, CO 80231

#### \$1,234,000

4 Bedrooms - Bathrooms - Outdoor Jaccuzzi - Full Basketball Court - Enormous Basement

This sophiseicased bi-level home has been coully refurbished wich the finess of details chroughous. The elegant coursyard leads you into this dramacic home wich old-world charm. Privace formal dining room wich fireplace... elegane living room.





#### Call Me Today!

Elise Trainer, GRE ABR Realtor Office: (480) 955-3200 Mobile: (480) 422-8896 etrainer@kw.com



#### www.kellerwilliams.com

Keller Williams Realty | 4525 S. Broadway, Suite 200 | Scottsdale, AZ 85250



Equal Housing Opportunity. If you have a brokerage relationship with another agency, this is not intended as a solicitation. All information deemed reliable but not guaranteed.





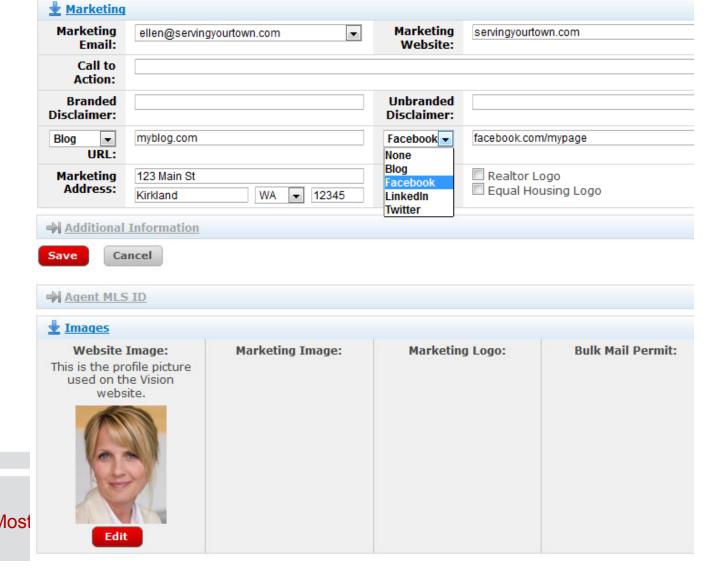
Making the Most of Marketing to Your Contac

fB

Connect with me on:



Instead of two profiles to manage, now only one agent profile to manage.

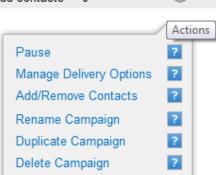






Build a New Campaign 🕟					New to cam	paigns? Wate	h the video
Basic Advanced						Manage I Acco	
Name 🔻	Туре	Activities	Emails	Direct Mail	Next Delivery Date	Contacts	Actions
8x8 Buyer	? Interval	0	8	0	Inactive, Add contacts	0	0
12 Direct	? Interval	0	0	12	Inactive, Add contacts	0	<b>(</b> )}
							Actions

New myMarketing is one user interface. That means that myMarketing resides inside of eEdge rather than outside. It has the same look and feel as eEdge because it is 100% integrated.





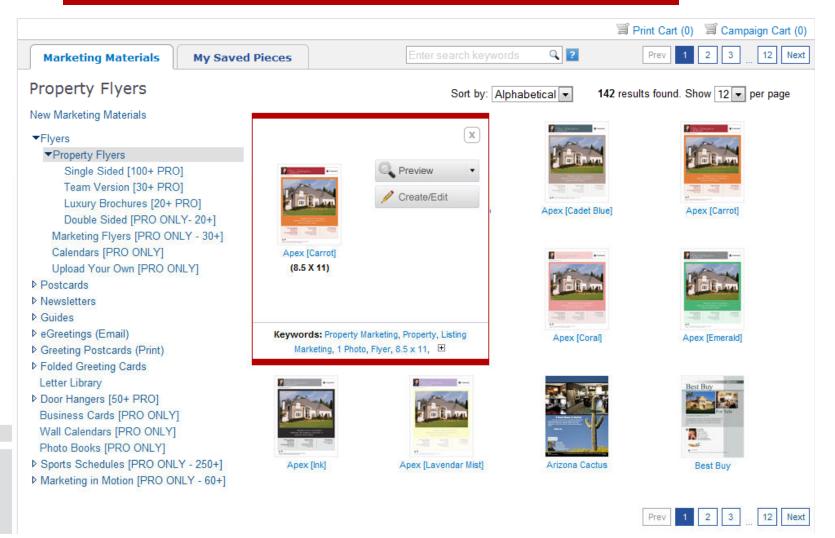


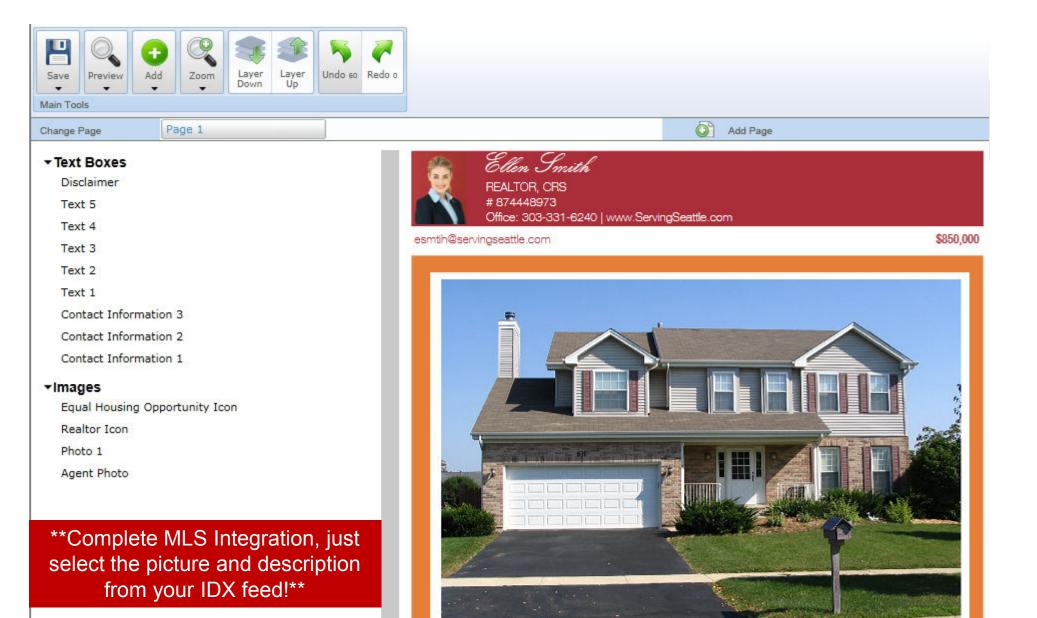




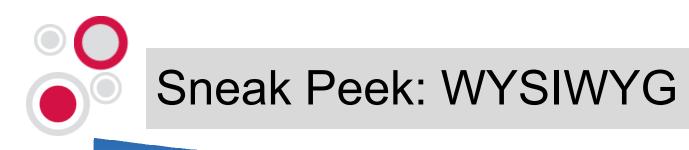


#### 60% more marketing pieces at launch for eEdge users!





New construction, with over 1000 sq ft finished, perfect for first time home buyers. This property is rent buster. Nested in to a fast growing area with great potential for resale in 3 to 5 years.





You can move pictures, add text boxes, completely redesign any of the templates.









# Watch the Demo Video!



Making the Most of Marketing to Your Contacts















## **Sneak Peek: Print Integration**

myLeads Powered by market leader.		Welcome Ellen	Smith at Keller Williams R	eality International [log out]
Dashboard Inbox V Contacts V Market My Listings V S	Search MLS C	Create Marketing 🔻	Admin 🔻 🕜 Help 🔻	
Dashboard       Inbox v       Contacts v       Market My Listings v       S         Marketing Materials       My Saved Pieces         Po       Contacts       Groups         Pos       A       Search Options         Nev       B       Search Options         Ciui       D       Clear Search         F       Select All       Deselect All         Foot       I       O Contacts Selected, 12 Total Contacts         J       Ernemann, Andrew       E         Lett       I       O contacts Selected, 12 Total Contacts         J       Elsworth, Ryan       E         Q       E, Ryan       R         W       X       Steve	Add ->	ve A B C C Search b D E F	Admin v Print Ca Print Ca in your list ch Options y Last Name: Last name o ect All Deselect / is Selected, 0 Total Contacts	Prev 1 Next
Y Z		Y Z		✓ Checkout
Done		😚 🛛 🍯 Interne	et   Protected Mode: Off	

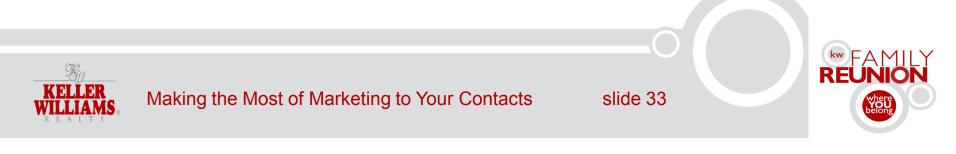


Order directly from myMarketing with Shutterfly. Real Time Proofs.











## myMarketing Transition

## **\*\*Anticipated March\*\***

- 1. With Launch your existing myMarketing will be accessible via your eEdge menu
- 2. Overlap of both tools

## **Training after Family Reunion**

- 1. http://mykw.kw.com/eedge
- 2. myMarketing webinars Before, During, After transition







## What Can I Do To Prepare?

### **Anticipated March**

- 1. With Launch your existing myMarketing will be accessible via your eEdge menu
- 2. Overlap of both tools

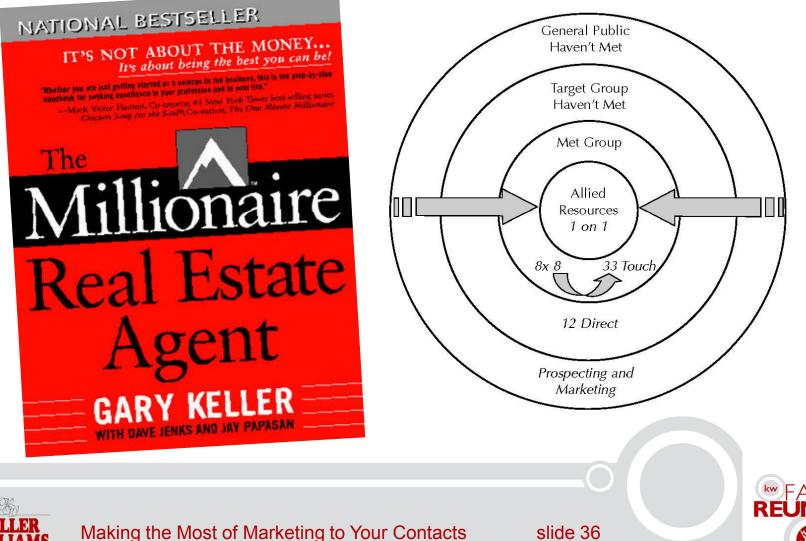
### **Training after Family Reunion**

- 1. http://mykw.kw.com/eedge
- 2. myMarketing webinars Before, During, After transition
- 3. I am available for onsite workshops for your MC and Regions. MichaelTritthart.com











HOME

eFDGE

•Action plans will be completely customizable

•Triggers can be date based or time based

ns will be customizable	Search				
CUSIONIZADIE		N PLANS			
an be date	Dashboard	Start a Plan	Manage Templates	Activated Plans	Contact Search
me based	Contact Details for 'Al	exis Scott			
	Alexis Scott			A	pply to a Template
	Phone Number -Unknown- Email Address Illusion1171@gmail.com Street Address -Unknown- Zip Code -Unknown- Min	emo History			
	Show 10 + entries				Search:
	Action Plan	Ţ	asks Status	Started	Completed
	open house for Alexis Scott	4	of 35 tasks completed	01/13/2012	
Making the Most of Marł					Showing 1 to 1 of 1 entries First Previous 1 Next Last

TECHNOLOGY

RESOURCES

EVENTS

EDUCATION COACHING MARKETING





 Pre-loaded templates

• Ability to customize

Making

Listing	Apply to	a Contact
Plan Description		
Listing Description		
Copy Action Plan		
	Si	earch:
Task Name	Task Description	Due from Effective Date
Assign lockbox	Assign lockbox to property	in 0 days
Obtain key	Obtain key from Seller for lockbox	in 0 days
Obtain listing agreement	Obtain listing agreement	in 0 days
Obtain seller's disclosure	Obtain seller's disclosure and (if necessary) lead-based paint disclosure	in 0 days
Obtain photographs	Take pictures of property	in 0 days
Update contact information	Update listing client's contact information (ie CRM, cell phone, etc)	in 0 days
Add listing to MLS/KWLS		in 1 days
Check FHAVA Registry	Check FHAMARegistry to determine qualification	in 1 days



Logging into myKW, you will be alerted to tasks for you to complete, take on the task or assign to one of your team members...

· · · ·	ACTION PLANS				
	ashboard Start a Plan	11 T. 1. 1. 1. 1. 1. 1. 1. 1. 1. 1. 1. 1. 1.	1.01		5
	Jashboard Start a Plan	Manage Templates Activat	ed Plans	Contact	Search
asks					
All	Ernail 🖸 Call 🚺 To-do	Appointment Mail			
(11)					
w 10	- entries			Search:	
	Task Description	Assigned To	Due	Status	Add Calendar
	Seller update phone call Alexis Scott open house for Alexis Scott	Laurie Sparrowhawk	01/06/2012	Skipped	N
	Obtain listing agreement Alexis Scott open house for Alexis Scott	Laurie Sparrowhawk	01/06/2012	Dropped	Y
	Schedule or obtain photographs	Laurle Sparrowhawk	01/06/2012	On Hold	N
	Alexis Scott open house for Alexia Scott			On Hold	N
	Addenses Scott open house for Alexie Scott Add listing to MLS/KWLS Alexie Scott open house for Alexie Scott	Laurie Sparrowhawk	01/06/2012	South Prove	
-	Add listing to MLS/KWLS	Laurie Sparrowhawk Laurie Sparrowhawk	01/06/2012	On Hold	N
	Add listing to MLS/KWLS Adexis Scott open house for Alexis Scott Create or order virtual tour				N N
	Add listing to ML SIKWLS Alexis Scott open house for Alexis Scott Create or order virtual tour Alexis Scott open house for Alexie Scott Thank you Letter	Laurie Sparrowhawk Laurie Sparrowhawk	01/06/2012	On Hold	
	Add listing to MLS/KWLS Alexis Scott: open house for Alexis Scott Create or order virtual tour Alexis Scott: open house for Alexie Scott Thank you Letter Alexis Scott: open house for Alexis Scott Create individual website, listing landing	Laurie Sparrowhawk Laurie Sparrowhawk	01/06/2012 01/06/2012	On Hold Completed	N



Making the Most of Marketine



mv

EDUCATION

EDGE

COACHING

MARKETING

TECHNOLOGY

RESOURCE

Create a Task for yourself, team member or another associate in the market center.

26		welcome caulle Sp	arrowhawk - Keller William	s readily fills, wrond sw
W ACTI	ON PLANS			
Dashboard	í Start a Plan	Manage Templates	Activated Plans	Contact Search
reate Task				
sk Name				
inter Task Name			Save	
sk Description				
inter Task Descripti	on			
assigned to				
Select Associate				
Select Associate				
Laurie Sparrowhawi Graham Cohen	k			
Veronica Diaz				
Priority:	🖲 Low 🔘 Medium 🔘 H	ligh		
Due Date offset:	7 🖨 days 🔻	after 🔹 the effective date		
Due Date:	01/26/2012			
Drop:	No drop time frame	Add drop time frame		
Add to Calendar:	🖲 No 🖱 Yes			
Weekend:	No change with week	ind due date 🗇 Change weekend	due date	
Attachment:		Browse_		
	Upload Attachment			



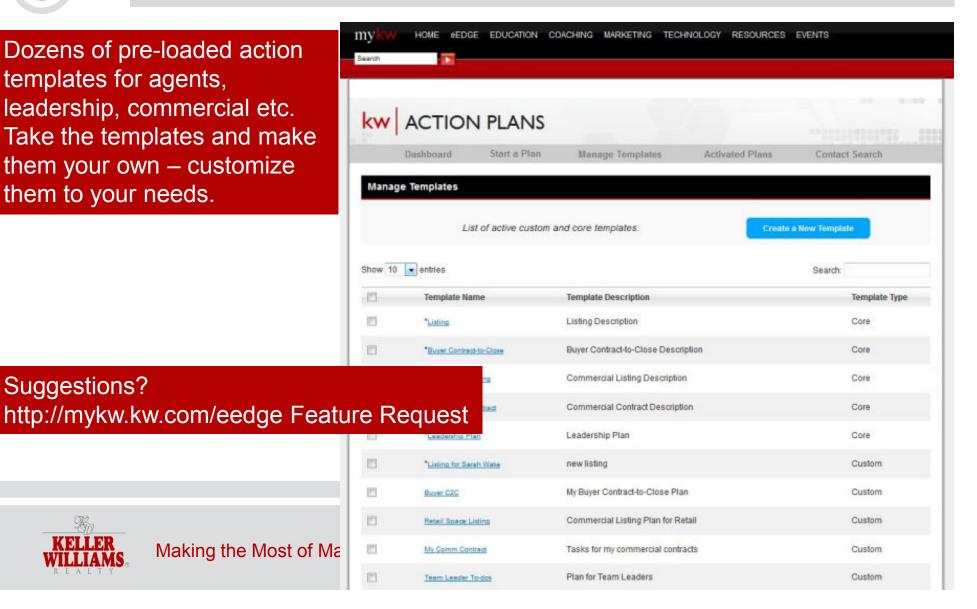
Making the Most of Marke



Suggestions?

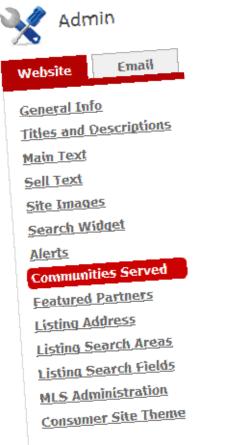
### **Sneak Peek: Action Plans**

Dozens of pre-loaded action templates for agents, leadership, commercial etc. Take the templates and make them your own - customize them to your needs.





## Bonus Features – eEdge Website Update



Name of Community:	Kirkland	
Add a Zip/Postal Code:	Add 2	ip/Postal Code
98033 😵 98034 😵		
Review and Edit Descript This text will display at the	ive Content top of this community's page. Please note	that the page may be b
if no content is entered.		
B I ⊻   ≣ ≣ ≣ ≣	Paragraph - Arial - 4 (14pt) -	•
日日   律律   9 (*	<u>A</u> - 🥹 -	
📟 🍜 💆   — Ω 😃 🧭		
Living in Kirkland		
	NUM AND TRANSPORT OF A DATA OF A DAT	
Kirkland is an amazing plac of the many businesses loc		بالمتعاديدي بل
Kirkland is an amazing plac of the many businesses loca locally couldn't be more con	ated in Kirkland, living	28 × 4000
of the many businesses loca	ated in Kirkland, living venient.	****
of the many businesses loca locally couldn't be more con	eted in Kirkland, living venient. t restaurants and nightlife,	Discard Content Change
of the many businesses loca locally couldn't be more con	t restaurants and nightlife,	Discard Content Change
of the many businesses loca locally couldn't be more con Downtown Kirkland has grea Descriptive Content Best	ented in Kirkland, living venient. t restaurants and nightlife, Practices V	
of the many businesses loca locally couldn't be more con Downtown Kirkland has grea Descriptive Content Best	t restaurants and nightlife,	Discard Content Change
of the many businesses loca locally couldn't be more con Downtown Kirkland has grea Descriptive Content Best	ented in Kirkland, living venient. t restaurants and nightlife, Practices V	
of the many businesses loca locally couldn't be more con Downtown Kirkland has grea Descriptive Content Best	ented in Kirkland, living venient. t restaurants and nightlife, Practices V	
of the many businesses local locally couldn't be more con Downtown Kirkland has grea Descriptive Content Best Center of Community: (Cl	ented in Kirkland, living venient. t restaurants and nightlife, Practices V	
of the many businesses local locally couldn't be more con Downtown Kirkland has grea Descriptive Content Best Center of Community: (Cl	ented in Kirkland, living venient. t restaurants and nightlife, Practices V ick and Drag pin to center of community.)	

5TH Ave

Way



#### Making the Most of Marketing to



### Bonus Features – eEdge Website

Not have a date for this release but stay tuned to the KWRI webinars for more details.

Will be incorporated in the workshops/training that I do as soon as it's released.

#### Kirkland Listings Search

#### Kirkland Foreclosure Listings (52) Kirkland Short Sale Listings (105) Kirkland Single Family Homes for Sale (267) Kirkland Condos & Townhomes for Sale (202)

#### Communities Served Bellevue Bothell Factoria Green Lake Issaguah

#### Eactoria Green Lake Issaguah Kennydale Kirkland Magnolia

Magnolia Mercer Island seattle Somerset West Seattle Woodinville

Why Register?

 Access to thousands of home listings

- Email alerts for homes in your area
- Personalized home searches
  Faster searching with saved
- Ability to save homes you like



#### Living in Kirkland

Kirkland is an amazing place to live. If you work in one of the many businesses located in Kirkland, living locally couldn't be more convenient.

Downtown Kirkland has great restaurants and nightlife, and the neighborhoods are full of friendly faces everywhere, humble folks without temptations, ample parking day or night, and people shouting "howdy neighbor"!

You can use the home search below to look at available listings in Kirkland.



Feel free to watch this video tour of Kirkland.





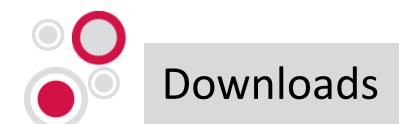
Properties with the source of the courtesy of Northwest MLS. Square Footage is based on information available to agent, including county records. Information has not been verified by agent and should be verified by buyer. Updated Cot 12, 2011 10:31 cam. Information deemed reliable but not guaranteed.

Copyright 2012 Los Cabos Multiple Listing Service





Making the Most of Marketing to Your



To download a free copy of this presentation, go to <u>www.familyreunion.kw.com/downloads</u> or <u>MichaelTritthart.com</u>

To purchase audio for this and other Family Reunion 2012 breakout sessions, visit the KWU Bookstore in the Exhibit Hall or go to <u>www.familyreunion.kw.com/downloads</u>





# Thanks for being here!

Submit your breakout feedback electronically!



Scan the QR code (Also located on signage outside of this room) Type in the QR ID # Provide your feedback! Don't have a smartphone?

Visit <a href="http://familyreunion.kw.com/breakout-survey">http://familyreunion.kw.com/breakout-survey</a>

Session #6T





orlando fl feb11-15 2012 familyreunion.kw.com