

eEdge: What do I do Now?

What is eEdge? It is a lead to close business solution offered only to KW agents. It contains lead management and routing, contact manager, marketing and paperless transaction system. It allows you to sign on in one place (www.mykw.kw.com) and access kw.com, the intranet and Market Leader.

When you sign into www.mykw.kw.com you will see the eEdge control panel. This includes:

- My Leads – notifies you of any new leads
- My Marketing – notifies you to take action on any new listings
- My Transactions – notifies you of any action required on contracts (rolls out in May)
- My Contacts
- My Email
- On the left side of the page, below your picture, you will see “MC 373 Web Office”.

The screenshot displays the mykw eEdge control panel for Maureen Legac. The top navigation bar includes links for HOME, EDUCATION, COACHING, MARKETING, TECHNOLOGY, RESOURCES, EVENTS, REPORTS, and HELP. A search bar is located on the right. The user's name and market center (Sarasota Lakewood Ranch MC#373) are displayed. The main dashboard features several sections: myLeads (0 New Lead), myMarketing (1 New Listings), myTransactions (Coming Soon!), myContacts (View Contacts), and myEmail (0 eEdge Messages). A table shows Listing and Sales by Month for January. A large banner for Keller Williams Realty says "BREAK on THROUGH State of the Co. 2011". A red arrow points to the "MC 373 Web Office" link in the left sidebar, and another red arrow points to the "myEmail" section on the right.

All sections of eEdge are integrated so when you access your Marketing tools, the information is populated from “My Contacts”. Wherever you are in the eEdge system, the control panel toolbar will appear at the top of the page.

For those familiar with Market Leader, the “Help and Support” option has been moved to the upper right side of the page.

The screenshot displays the mykw eEdge dashboard for Maureen Legac. The top navigation bar includes links for HOME, EDUCATION, COACHING, MARKETING, TECHNOLOGY, RESOURCES, EVENTS, REPORTS, and HELP. Below this, there are tabs for myLeads, myMarketing, myTransactions, myContacts, and myEmail. The dashboard itself is divided into several sections: a left-hand navigation menu with options like My Inbox, Contacts, and Admin; a central area with 'New Leads (0)', 'New messages (0)', and 'Upcoming Reminders (4)'; and a right-hand sidebar with a 'Performance' chart and 'Recent Contacts Online' list. Two red arrows point to the top and right edges of the dashboard area.

To be successful with your eEdge system, you should be completing these actions daily:

1. Login to eEdge at least twice a day (morning and evening)
2. When you see a new lead, respond and UPDATE THEIR STATUS (this moves the lead off the dashboard and files it under that lead name where you can find it when you return to eEdge)
3. Reply to new email from prospects (file the email – so it moves to the prospect file)
 - a. Mail from prospects that are registered
 - b. Mail from potential prospects that are not registered (webmail)
4. Take action on all current reminders and set future reminders
5. Prepare marketing material for new listings or listing appointments
6. Once launched (in May), check and address notifications under “My Transactions”

Activating eEdge

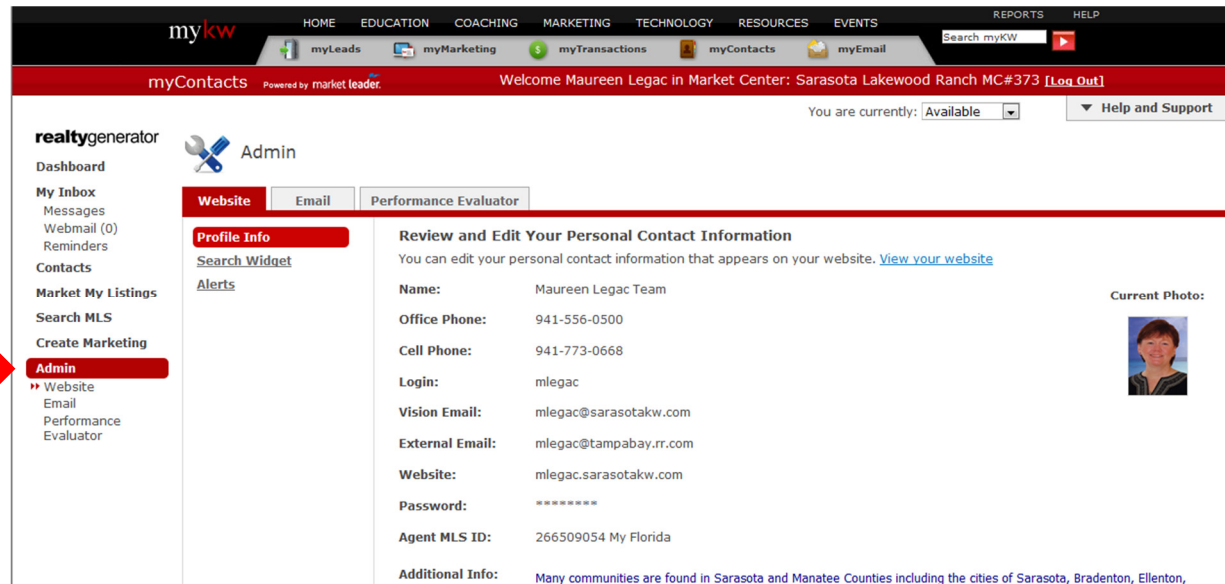
If you are not in Market Center 373 (or are a new agent), you may have to go through the eEdge setup. Please refer to page 12 of the Quick Start Guide at <http://images.kw.com/media/shared/mykw/docs/eedgequickstartguide.pdf>

If you are a member of a team and want to setup your eEdge account for your team, please refer to page 16 of the Quick Start Guide at <http://images.kw.com/media/shared/mykw/docs/eedgequickstartguide.pdf>

eEdge Setup

Your eEdge website is not a full functioning website. There is very little you can do to customize your site. Your Keller Williams eAgentC site is still your best customizable website. Your eEdge site is a Lead Capture source.

To ensure your leads are directed to you, setup your eEdge account (remember, KW is a “My Listings, My Leads” company but you have to tell eEdge how to identify that the listings are yours). To do this, click on the “My Contacts” link on your dashboard. You will be directed to the Market Leader portion of eEdge where you will see “Admin” on the left side of the page. Click the “Admin” link.



The screenshot shows the mykw eEdge Admin interface. The top navigation bar includes links for HOME, EDUCATION, COACHING, MARKETING, TECHNOLOGY, RESOURCES, and EVENTS. Below this is a search bar and a navigation menu with icons for myLeads, myMarketing, myTransactions, myContacts, and myEmail. The main header area displays the user's name, Maureen Legac, and their location, Sarasota Lakewood Ranch MC#373, along with a [Log Out] button. The left sidebar contains a navigation menu with the following items: Dashboard, My Inbox (Messages, Webmail (0), Reminders), Contacts, Market My Listings, Search MLS, Create Marketing, and Admin. The Admin link is highlighted with a red arrow. Below the Admin link are sub-links for Website, Email, and Performance Evaluator. The main content area shows the 'Website' tab selected, with a 'Profile Info' section and a 'Review and Edit Your Personal Contact Information' section. The 'Review and Edit' section includes fields for Name, Office Phone, Cell Phone, Login, Vision Email, External Email, Website, Password, and Agent MLS ID. A 'Current Photo' section is also visible on the right side of the page.

You will then update all sections under the Admin portion of your site.

Under WEBSITE, please ensure:

- Your office information is correct
- Your time zone is set correctly
- Your profile is added (name, bio, awards, etc)
- Your MLS ID is added (this is how your listings are associated with you)
- Main text on your site is updated
- Sell text is updated (appears on Sell page)
- Your banners and logos are updated
- Alerts are added – this is how you are notified that you have leads!!!
- Communities Served are added

Under EMAIL, please ensure:

- Listing alert campaign messages are updated (these are sent at various times to prospects NOT set up to receive listing alerts)
- Your email signature is as you want it

Now you are set up...so how does it work?

Leads come from a variety of sources. You will receive leads from your eAgentC website, your eEdge website, and from all the locations where KWLS syndicates your listings. All leads will be routed to your eEdge database and will appear on your dashboard.

You will be notified of leads through the eEdge dashboard and via the methods set up in your listing alert section of your eEdge system. To access the leads, click on the “My Leads” section of the dashboard. You will be routed to the Leads Control Panel (for those using the Market Leader system, this will be familiar BUT the lead status will be “Lead” and no longer “New”).

The screenshot shows the mykw dashboard interface. At the top, there is a navigation bar with links for HOME, EDUCATION, COACHING, MARKETING, TECHNOLOGY, RESOURCES, EVENTS, REPORTS, and HELP. Below this is a secondary navigation bar with icons for myLeads, myMarketing, myTransactions, myContacts, and myEmail. The main header area displays the user's name, 'Welcome Maureen Legac in Market Center: Sarasota Lakewood Ranch MC#373', and a 'Log Out' link. The dashboard content is divided into several sections. On the left, there is a sidebar with 'realtygenerator' branding and a 'Dashboard' section. The main content area features a 'New Leads (1)' section with a sub-header 'Contacts that are still in the "lead" category and need action.' Below this is a table with columns: Contact, Looking In, Avg Price, View, Save, Created, Activity, Status, and Actions. A single lead is listed: 'New User' (with a dollar sign icon), 'LAKEWOOD RANCH', '\$116,900', '1' view, '0' save, '2/28/11' created, '2/28/11 10:07 AM' activity, and 'Lead' status. A dropdown menu is visible next to the 'Lead' status. To the right of the table, there is a 'Performance' section with a bar chart titled 'Contacts - Last 30 Days' showing data for Advertising, Keller Williams, Market Leader, and Personal Marketing. Below the chart, it states 'You've Received 4 New Contacts in the Last 30 Days'. Two red arrows are overlaid on the image: one pointing to the 'New User' link in the table, and another pointing to the 'Lead' status dropdown.

As soon as a lead registers, they are sent a welcome message from the system (with your email signature). This “buys” you a little time to respond. As soon as you can get back to the dashboard:

1. Click on the lead name to respond
2. This will open the lead file where you will find instructions at the top of the page below the leads name.
3. Click on the ICW link at the end of the first paragraph. This will open the Initial Contact Wizard and assist you in responding to leads. The ICW is what sets the Performance Evaluator (sets your score).

mykw HOME EDUCATION COACHING MARKETING TECHNOLOGY RESOURCES EVENTS REPORTS HELP

myLeads myMarketing myTransactions myContacts myEmail Search myKW

myContacts Powered by market leader Welcome Maureen Legac in Market Center: Sarasota Lakewood Ranch MC#373 [Log Out]

You are currently: Available Help and Support

realtgenerator New User [Back to List](#)

Dashboard

My Inbox
Messages
Webmail (0)
Reminders

Contacts

Market My Listings

Search MLS

Create Marketing

Admin
Website
Email
Performance
Evaluator

New is looking for a \$116,900 Single Family with at least 4 beds and 2 baths in LAKEWOOD RANCH.

This is a new contact from your website.
Use the Initial Contact Wizard (ICW) to walk you through communicating with this new contact. According to NAR, there is a 72% success rate of turning a web contact into a client if live contact is made within the first hour after the contact's visit. After 4 hours, the chance drops to 29%.
[Open the ICW.](#)

Summary Listings Alerts (1), Saved (0), Viewed (1) History [Send Listings](#)

Name: [New User](#)

Email 1: newuser@gmail.com (Primary)

eSignature Email: newuser@gmail.com

Address:

Status:

Timeframe: Now Moving From: Bradenton FL

Created: 2/28/11 10:06 AM Looking In: LAKEWOOD RANCH

Source: Offline Marketing Has Agent? No

Last Action: 2/28/11 10:07 AM Has Requested Pre-approval? Yes

Eligible for Alerts? Yes Has Mortgage Lender? No

Eligible for System Emails? Yes Selling Home? No

Listing Addresses? On

[Edit](#)

Start myTransaction
Go to Campaigns
Send Email
Transfer
Print
Send to Lender
Export V-Card
Resend Welcome Email
Stop System Emails

Current Reminders

3/3/11
New User has just setup a listing alert. We recommend you review their listing alert criteria to ensure they are reasonable for the area.
Source: System

4. If the lead provided a phone number, the system will display the phone number and scripts to use when phoning the lead. There is also a list of outcomes from the call that you can select – which sets up the next step in the lead action plan.

mykw HOME EDUCATION COACHING MARKETING TECHNOLOGY RESOURCES EVENTS REPORTS HELP

myLeads myMarketing myTransactions myContacts myEmail Search myKW

myContacts Powered by market leader Welcome Maureen Legac in Market Center: Sarasota Lakewood Ranch MC#373 [Log Out]

You are currently: Available Help and Support

realtgenerator New User [Back to List](#)

Dashboard

My Inbox
Messages
Webmail (0)
Reminders

Contacts

Market My Listings

Search MLS

Create Marketing

Admin
Website
Email
Performance
Evaluator

Initial Contact Wizard

Subject:

From: Maureen Legac

To: newuser@gmail.com

Hello,

Change prospect status to "Retry" after sending email.

New is looking for a \$116,900 Single Family with at least 4 beds and 2 baths in LAKEWOOD RANCH.

Recommended Listings (0)
These are the listings the system recommends based on the searches this prospect has performed on the site.

Eligible for Alerts? Yes Has Mortgage Lender? No

Eligible for System Emails? Yes Selling Home? No

Listing Addresses? On

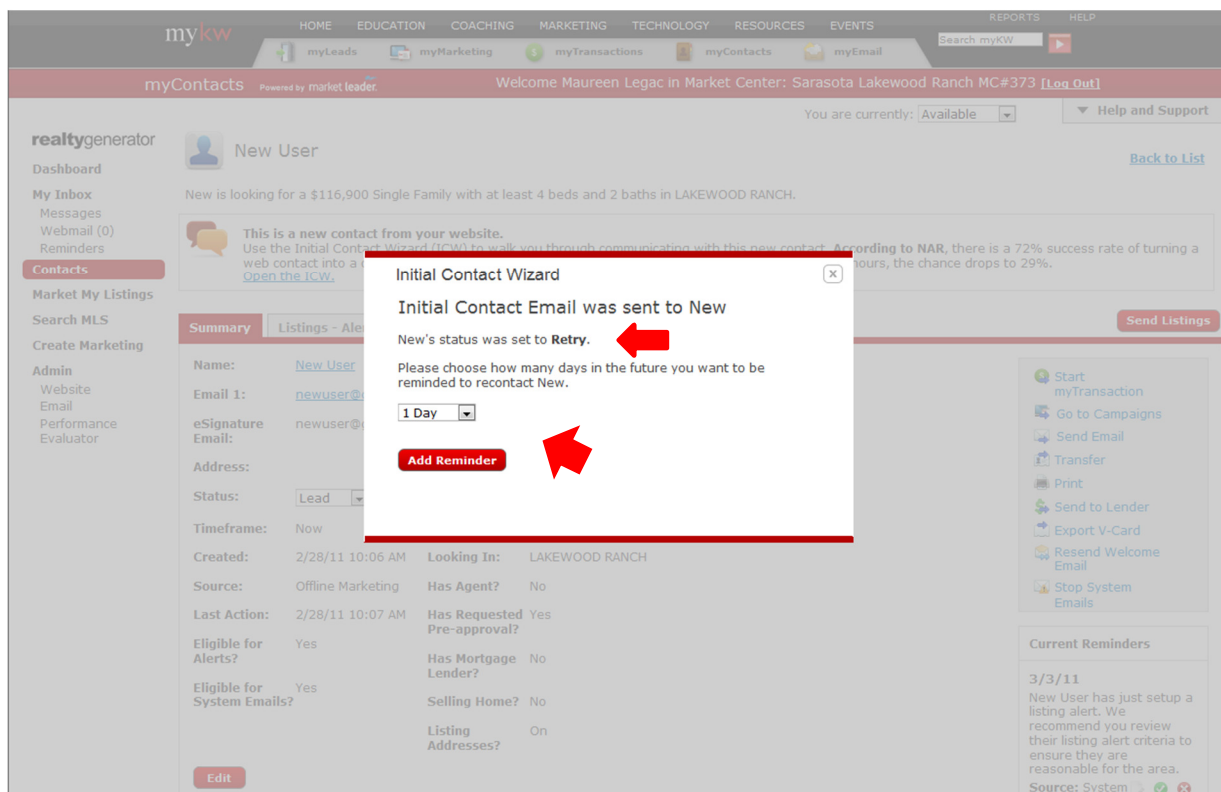
[Edit](#)

Start myTransaction
Go to Campaigns
Send Email
Transfer
Print
Send to Lender
Export V-Card
Resend Welcome Email
Stop System Emails

Current Reminders

3/3/11
New User has just setup a listing alert. We recommend you review their listing alert criteria to ensure they are reasonable for the area.

5. If the lead did not supply a phone number but did supply an email address, you will be prompted to send an email to this lead. You DO NOT have to include your signature and contact information in this email. It will automatically be pulled from your email signature section of the system setup.
6. You MUST change the status of this lead as soon as you respond to it (the system will automatically set the lead to “Retry” after you send an email). This will removed the lead from your dashboard and file it in a folder assigned to that lead. It will also remove the lead from the Administrator’s dashboard (so the girls in the office that administer this system will know you responded). You will also be asked to set a reminder for this lead – so you will remember when to initiate the next contact.



Importing Contacts

Before you import all of your leads to the eEdge database, try to clean up your existing database. Also, continue using your current Contact Management System until you become familiar with and are comfortable with the eEdge Contact Management System.

You can import up to 500 contacts a day. In April, a new upload system will be in place to help with the transition between your old Contact Manager and the eEdge Contact Manager. For now, it is best to upload the contacts by group (using the group category name).

1. First, export your contacts into a *.csv file. This process varies by system so consult the user manual for your current Contact Management system or contact that support team for help.
2. Open your *.csv file using Excel and make sure the contact information is in separate columns in the following format and order (from left to right):
 - a. First Name
 - b. Last Name
 - c. Home Phone
 - d. Work Phone
 - e. Cell Phone
 - f. Address 1
 - g. City 1
 - h. State 1
 - i. Zip 1
 - j. Address 2
 - k. City 2
 - l. State 2
 - m. Zip 2
 - n. Address 3
 - o. City 3
 - p. State 3
 - q. Zip 3
 - r. Email address 1
 - s. Email address 2
 - t. Email address 3
 - u. Password

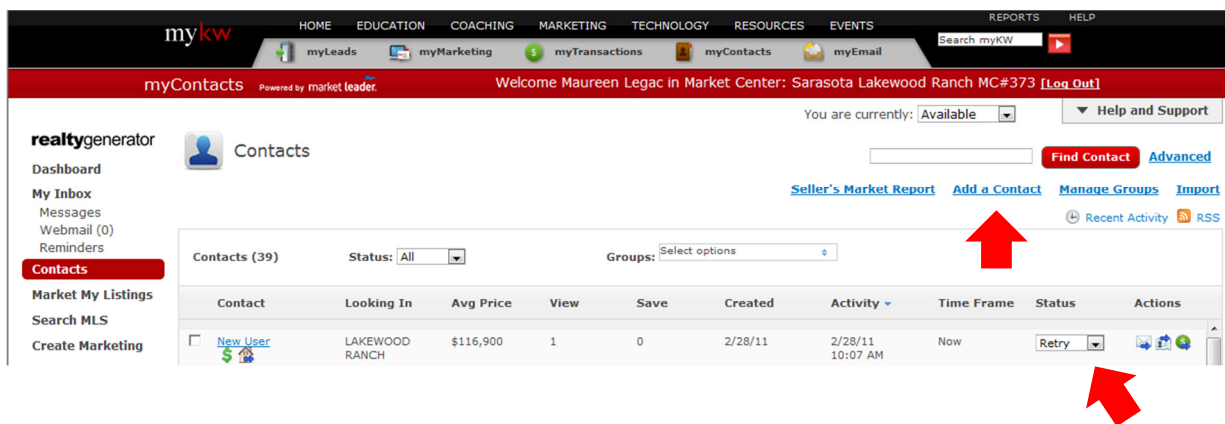
Note: Be sure all contacts have all of these columns in your spreadsheet even if they do not have data in them. Contacts MUST have a First Name, Last Name and email address in order to be imported as a contact.

3. Be sure to delete the row with the header names (only import the actual contact information)
4. Click on Import/Export on the upper right side of your “My Contacts” dashboard
5. When possible, assign a “group” to the contacts (this is why we recommend that you import by group)
6. Change the status from “Lead” to “Inactive” – so that all of the imports do NOT end up on your dashboard (and the system dashboard)
7. If you would like to send a “Welcome” message, check the box. **DO NOT CHECK THE BOX IF YOU ARE UPLOADING MORE THAN 100 LEADS.** Your email address will be flagged as a spam provider! You can send individual welcome emails at a later time.
8. Choose your *.cvs file and click “Import”

9. You will get a message showing how many records were imported and how many were not.
10. If not imported, the system will tell you:
 - a. The *.csv file did not include all the proper information
 - b. The information was not in the proper order
 - c. The header row was not deleted

Adding Contacts

If you would like to add individual contacts (not a full import from another contact manager), then click the “Add Contact” from the “My Contacts” dashboard.



Fill out the required information and select a contact status. The following statuses are recommended for all of your Contacts:

- Lead - Leads who’ve just registered; you have not responded to them yet
- Retry - Contacts you’re trying to engage
- Active - Contacts who are “just looking” but are interactive
- Inactive - Contacts who are not currently looking to buy
- Hot - Contacts who are ready to buy/sell now
- Sold - Contacts you have just closed
- Trash - Contacts who wish to be unsubscribed (there is no “delete” option)

This is an overview of the Contact Management system. We will have a more in-depth class on the contact manager on March 14th.

Email

When you activated the eEdge system, you were provided with a new "@kwrealty.com" email address. This email address is integrated into eEdge, so all correspondences sent to this address, or from this address, will be saved and filed with the contact's record.

On your dashboard, click on "My Email" to display all new email messages. If you received email from any potential prospects NOT registered in your system, they will appear in the "Webmail" section of your email (link to found on the upper left side of the page).

The screenshot shows the mykw myEmail dashboard. The navigation menu on the left includes: Dashboard, My Inbox (highlighted with a red arrow), Messages, Webmail (0), Reminders, Contacts (highlighted with a red arrow), Market My Listings, Search MLS, Create Marketing, Admin, Website, Email, Performance, and Evaluator. The main content area shows the Inbox with a message list:

Contact	Message	Date	Actions
Nikki Gordon	RE: New homes for Sale	10/4/10 12:59 PM	[Icons]
Nikki Gordon	RE: New homes for Sale	10/4/10 1:22 PM	[Icons]
Nikki Gordon	RE: New homes for Sale	10/4/10 3:02 PM	[Icons]
Nikki Gordon	RE: New homes for Sale	10/4/10 3:48 PM	[Icons]

When replying to email, you can type a message or select a template (in the drop down box).

Marketing

Before you get started in "My Marketing", you'll need to upload your photo and logo so that your "My Marketing" materials are pre-populated with these images.

The screenshot shows the mykw myEmail dashboard with a red arrow pointing to the myMarketing tab in the navigation bar. The navigation menu on the left includes: Dashboard, My Inbox, Messages, Webmail (0), Reminders, Contacts, Market My Listings, Search MLS, Create Marketing, and Admin. The main content area shows the Inbox with a message list:

Contact	Message	Date	Actions
Nikki Gordon	RE: New homes for Sale	10/4/10 12:59 PM	[Icons]

The screenshot shows the mykw dashboard with the 'myMarketing' menu open. A red arrow points to the 'Market Me' option. The dashboard includes a navigation bar with links like HOME, EDUCATION, COACHING, MARKETING, TECHNOLOGY, RESOURCES, EVENTS, REPORTS, and HELP. The user is logged in as Maureen Legac in Market Center: Sarasota Lakewood Ranch MC#373. The left sidebar shows 'myEmail' and 'realtygenerator' sections. The main content area shows an 'Inbox' with 0 messages and a table of messages from Nikki Gordon.

Contact	Message	Date	Actions
Nikki Gordon	RE: New homes for Sale	10/4/10 12:59 PM	
Nikki Gordon	RE: New homes for Sale	10/4/10 1:22 PM	
Nikki Gordon	RE: New homes for Sale	10/4/10 3:02 PM	
Nikki Gordon	RE: New homes for Sale	10/4/10 3:48 PM	

1. Click on the My Marketing link on your dashboard
2. Click on Market Me
3. Click on Create Marketing

The screenshot shows the mykw dashboard with the 'myLeads' section active. A red arrow points to the 'Profile' link in the left sidebar. The dashboard includes a navigation bar with links like HOME, EDUCATION, COACHING, MARKETING, TECHNOLOGY, RESOURCES, EVENTS, REPORTS, and HELP. The user is logged in as Maureen Legac in Market Center: Sarasota Lakewood Ranch MC#373. The left sidebar shows 'myLeads' and 'realtygenerator' sections. The main content area shows 'New Leads (0)' and a table with columns: Contact, Looking In, Avg Price, View, Save, Created, Activity, Status, and Actions. A 'Performance' chart is also visible on the right.

Contact	Looking In	Avg Price	View	Save	Created	Activity	Status	Actions
No records returned.								

4. Click on Profile

The screenshot shows the mykw myMarketing interface. The top navigation bar includes HOME, EDUCATION, COACHING, MARKETING, TECHNOLOGY, RESOURCES, EVENTS, REPORTS, and HELP. Below this is a search bar and a welcome message for Maureen Legac. The main content area is titled 'Home' and features several sections: 'Quick Start', 'Create New Project' (with options for Flyer, Postcard, Presentation, and Campaign), 'Create New Subject Folder', 'KW Automated Marketing Campaigns' (12 Direct, 8x8 for Buyers, 8x8 for Sellers, 33-Touch), 'Presentations' (Pre-listing, Listing, Buyer Consultations), 'Postcards' (12 Direct, Just Listed, Just Sold), 'Flyers' (Property Flyers, Open House Flyers), and 'Market Leader Pro Features' (Deluxe Listing packages, Virtual Tour Suite, eMarketing Suite, Custom Campaigns). A red arrow points to the 'Home' link in the left sidebar.

5. Click to upload your logo (or select a preloaded logo)
6. Click to upload your photo

The screenshot shows the mykw myMarketing interface, specifically the Profile Overview page for Maureen Legac. The top navigation bar is the same as in the previous screenshot. The main content area is titled 'Profile Overview' and includes a sidebar with account details and a main section with links to update various profile elements. The sidebar details include: Account ID: 11421, Email: mlegac@SARASOTAKW.COM, Company: Keller Williams - Sarasota Lakewood, Address: 6710 Professional Parkway 301, Sarasota, FL 34240, Phone: 941-556-0500 (Office), 941-773-0668 (Cell), Expires: Never, and Hosting: 0 KB / 500 MB. The main section includes links for: Contact Information, Office Information, Logo (Upload or change your company logo), Photo (Upload or change your personal photo), Postal Indicia (Upload or change your postal indicia), and Preferences (Customize your experience in the Marketing Center).

The Marketing section has preloaded campaigns (8x8, 33 Touch and 12 Direct). There are listing packages, prelisting packages and buyer packages. We will have a more in-depth class on the Marketing segment on March 21st.