# Contacts Playbook

KW Where Entrepreneurs Thrive

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## Telemarketing

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# Make Money While You Move Your Contacts

The goal of any real estate agent should be to maximize revenue potential within the framework of the hours they want to work.

There are two desired outcomes when lead generating:

1. Find people who need to buy and sell real estate today. (Current business)
2. Stay in touch with people who will need to buy and sell real estate *in the future.* (Future business)

We have several Playbooks that focus on #1, but this Playbook focuses on #2.

The most effective way to accomplish #2 is to purposefully use a Customer Relationship Management (CRM) tool to stay top of mind with your database. Using a CRM can make you more purposeful, efficient, and productive.

The goal when using a CRM is to generate revenue by creating a database that has the information you want and a system that helps to keep you top of mind with your contacts. This is true whether you're creating a new database or moving your contacts from one CRM to another.

In either case, there are 5 truths:

1. Whether you're creating a database or moving it, it vshould be a revenue-generating activity not an administrative burden.
2. Incomplete or inaccurate data leads to lower conversion rates.
3. Transferring a messy database from one system to another creates a bigger mess.
4. Failing to keep in touch with your database negates the reason to have one at all.
5. Meaningful touches create meaningful relationship.

Ultimately, effectively moving your contacts into a CRM will produce deeper relationships and uncover buyers and sellers who want to transact today.

**PRO TIP:** Find all Playbooks on KW Connect.

# Make Money While Moving Your Contacts

1. Build Your Database
2. Segment Your Database
3. Determine Important Information
4. Fill in the Holes
5. Upload Your Database
6. Use SmartPlans and Tasks

# 1 Build Your Database

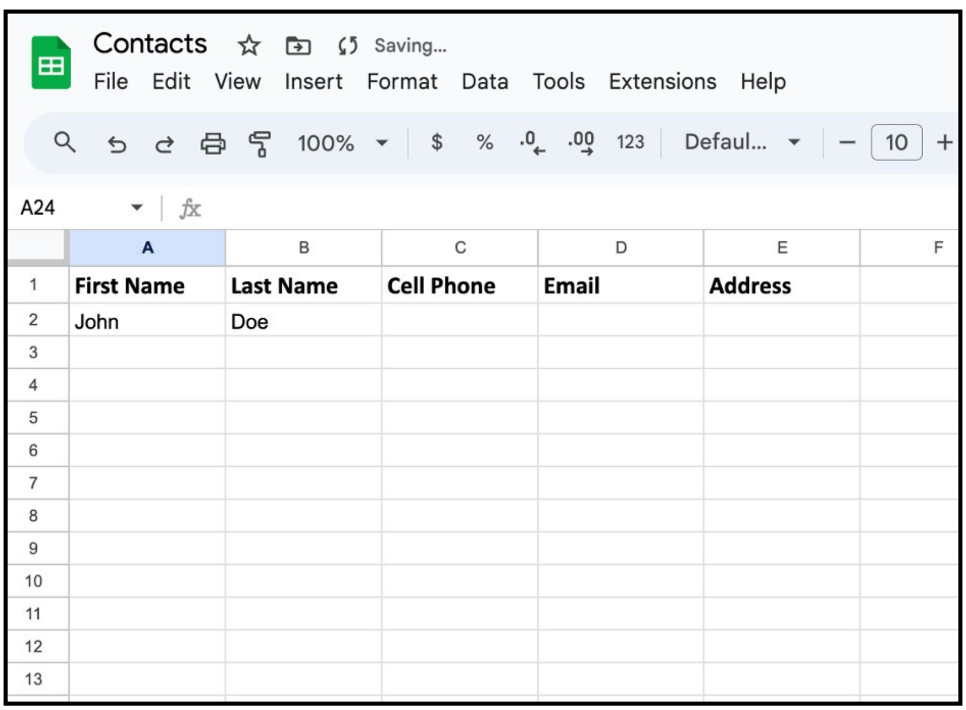
You can't start using a CRM effectively without first having a database! No matter where you currently store your contacts—in a spreadsheet, on your phone, or even in a box that holds business cards—you need to be purposeful about building a clean and organized database before you can move it into a CRM.

**If you are new to real estate or don't have a database:**

1. Create a new, blank Excel or Google spreadsheet.
2. Start listing all of the people you think you know and who you want to keep a relationship with. *(Include all of the basic information you have about them: name, phone number, email, etc.)*
3. Once you've exhausted your memory, export the contacts in your phone and add them to your spreadsheet.

**If you already have a database:**

1. Export all of your contacts to a Excel or Google spreadsheet.
2. The next step is to segment your database into groups that will help you effectively keep in touch with people.



# 2 Segment Your Database

Databases are composed of people who have entered our life or business in different ways. Some are friends and family, past clients, people we've met at events, vendors, etc. By segmenting the database, we are simply grouping people by the position they hold in our database today. This allows us to communicate effectively with the appropriate frequency and intensity.

Below is a list of some of the most common categories agents use to segment their database.

1. **SOI -** This includes people who know you, like you, and want you to succeed.
2. **VIP -** People that are most likely to refer you customers and who you want to stay in deep relationships with.
3. **Past Clients -** People you have helped buy, sell, or lease real estate.
4. **Referrals -** Someone that was referred to you.
5. **Leads -** These are people you have had one-way communication with (maybe you've left a door hanger, or called, but you have not yet spoken with them).
6. **Agent -** These are people you meet at real estate events and/or agents who have, or might, refer your business.
7. **Vendor -** Track vendor by specific services such as "Inspector" or "Lender."

Once you've established the categories you want to use, refer back to your spreadsheet and make a new column labeled "Tags." In Command, tags are a feature that allow you to easily filter your database. This is a best practice during lead generation when you want to have *purposeful* conversations with a certain group of people.

**You've now started your spreadsheet by either creating it new or exporting it and have begun tagging appropriately.**

**Next, you are going to determine what pieces of information you want to have about your contacts that are most important to you.**

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| | A | B | C | D | E | F |
|---|---|---|---|---|---|---|
| 1 | **First Name** | **Last Name** | **Cell Phone** | **Email** | **Address** | **Tags** |
| 2 | John | Doe | 512-876-9567 | john.doe@gmail.com | 1234 Main St. Austin, TX 78746 | SOI, VIP |
| 3 | | | | | | |
| 4 | | | | | | |
| 5 | | | | | | |
| 6 | | | | | | |
| 7 | | | | | | |

# 3 Determine Important Information

Your database is only as good as the data you put into it. This may sound obvious or even trivial, but it might be the most important concept of this Playbook. Many real estate agents fail to decide what pieces of information will constitute a complete contact record. This leads to a “junk drawer” style database where each record has different pieces of information or missing data, thus making it difficult to have purposeful touches.

> Start by asking yourself *“What data would be most beneficial for me to have about the people in my database and why would it be helpful to have it?”*

Keller Williams’ top agents have perfected their databases over long periods of time. They have identified the “must haves” and keep them as the foundation of their database. Once the foundation is laid and “must haves” are complete, they collect “nice to haves” over time as additional information.

| | INFORMATION | WHY IT'S IMPORTANT |
|---|---|---|
| "must haves" | **First and Last Name** | To increase personalization and legitimacy |
| | **Phone Number** | To call contacts |
| | **Email Address** | To email contacts |
| | **Physical Address** | To mail and/or run CMAs |
| | **Birthday** | To time intentional touches |
| "nice to haves" | **Preferred Contact Method** | To contact them how they want to be contacted |
| | **Additional Addresses** | To run CMAs |
| | **Additional Relationships** (Spouses, etc.) | To connect relationships and make conversations personal and intentional touches |
| | **Children’s Name + Birthdays** | To make conversations personal and intentional touches |
| | **Occupation** | To make conversations personal and intentional touches |
| | **Source** | To track how people people enter your database |
| | **Social Media Profiles** | To connect digitally |
| | **Home Anniversary** (Past Clients) | To make conversations personal and intentional touches |

Keep in mind that the same “must have” rules may not apply to leads that you have not had a two-way conversation with. The above are pieces of information that are collected purposefully from your sphere of influence, past clients, and contacts you have had two-way conversations with.

Now identify the “must haves.” for your database. Go back to your spreadsheet and confirm that you have columns for each. If not, create new columns. Once you’ve done that, you will be able to begin filling in the holes!

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| | A | B | C | D | E | F | G | H |
|---|---|---|---|---|---|---|---|---|
| 1 | First Name | Last Name | Cell Phone | Email | Address | Tags | Birthday | |
| 2 | John | Doe | 512-876-9567 | john.doe@gmail.com | 1234 Main St. Austin, TX 78746 | SOI, VIP | 1/1/1972 | |
| 3 | | | | | | | | |
| 4 | | | | | | | | |

**PRO TIP:** Ask yourself if your “must have” list encompasses all of the information you need in order to complete your 36 Touch Campaign.

# 4 Fill the Holes

You are on the verge of having a clean and organized database that is bursting with opportunity. The *"getting ready"* is now behind you and it is time to uncover the amazing amount of business that has been hiding right under your nose. This is where the magic happens!

The holes in your database are simply missing pieces of information. You are going to fill the holes one segment at a time, and one contact at a time. Filling the holes comes from having a one-to-one conversation with each person. While technology can aid in finding information, the goal is to uncover opportunities which only come from having conversations.

> *If you want to be in a deeper relationship with someone you must communicate more often. If you want to be out of relationship with someone, just stop communicating.*
>
> **- Gary Keller**

This process is going to take time, but it will yield deeper relationships and raise the potential for real estate transactions!

**Before you start calling your database to fill in the holes, you are going to create two more columns:**

1. **Real Estate Plan for Next Year**
2. **Notes**

***Now, let's get started filling those holes!***

## STEP 1:

Pick a segment you want to start with. Choose the segment that is easiest for you to call —like your past clients.

## STEP 2:

Start calling down the list one contact at a time.

- **If they don't answer,** leave a voicemail. *"Hey ____. This is [your name]. I hope you're doing great. Give me a call back when you get a chance!"* Now keep going.
- **If they do answer,** exchange pleasantries and use the FORD framework to get into meaningful conversation. **FORD** - Family, Occupation, Recreation, and Dreams. Framing your conversation to be personal allows other pieces of information to reveal themselves. To uncover opportunities, you will need to fill the "Real Estate Plan for Next Year" hole. Simply ask, *"What is your real estate plan for the next year?"* They may ask what you mean or that they're not sure. In those moments, you can clarify by asking if they plan to buy, sell, or invest in real estate in the next year.

  They will answer in one of three ways:

  1. No real estate plan: they don't plan to buy, sell, or invest in real estate in the next 12 months. If they say this, note it in the spreadsheet.
  2. They do plan to buy, sell, or invest in the next year. If they say this,have a deeper conversation about what they plan to do and agree on a follow up plan. *These are the hidden opportunities!*
  3. They tell you that they just bought, sold, or invested without you. If they say this, follow the steps in this Playbook and this will happen with far less frequency.

## STEP 3:

While you're gathering information, fill in the holes on your spreadsheet. This includes any notes like when to follow up next or important things happening in their life at the moment.

Remember, the conversation is the relationship. This isn't about how quickly you can get through your list, it's about having deep conversations that move the relationship forward. If you spend the next year just calling every one of your contacts, it was a year well spent.

Once you have contacted, or attempted to contact, everyone in one segment, move onto the next. As you move on, people will contact you back and you will continue to fill in holes you missed.

| First Name | Last Name | Cell Phone | Email | Address | Tags | Birthday | Real Estate Plan For Next Year | Notes |
|---|---|---|---|---|---|---|---|---|
| John | Doe | 512-876-9567 | john.doe@gmail.com | 1234 Main St. Austin, TX 78746 | SOI, VIP | 1/1/1972 | Looking to move in 2 years when daughter is out of school | Recently got a new dog |

**PRO TIP:** *Continue mastering your database opportunities by completing Build a $100K Pipeline in 90 Days with Keller Williams University!*



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# 5 Upload Your Database

As segments begin to fill out and missing information is filled in, you can start to upload your contacts either one contact at a time or one segment at a time. While uploading one contact at a time is time consuming, it allows you to really focus on that contact and make sure every piece of information you have is accurate and uploaded properly.

A less time consuming option is to upload one segment at a time. You can upload to Command one of two ways:

1. Use the import sheet Command provides.
2. Use your own spreadsheet and map the fields to match.

Should you decide to go with the option of using the import sheet provided in Command, you will notice several fields in addition to the ones you have deemed important to you. It is okay that there will be empty columns. Any of them can be filled in later as you discover what information is important to you!

*KW Answers Help:* *Add Contacts Individually* *Import Options*

# 6 Use SmartPlans and Tasks

As we said at the beginning of this Playbook, failing to keep in touch with your database negates the reason to have one at all. Implementing a system to stay in touch with our contacts keeps us top of mind and ultimately increases conversion.

Once contacts are uploaded individually or by segments, refer back to your notes:

1. **Set purposeful follow-up tasks where appropriate:** Tasks should be set for all contacts that mentioned doing business in the next 12 months. Whatever period of time they mentioned doing business, cut it in half and set your follow up for that timeframe. For example, if they said they wanted to buy in 6 months, set your follow up for 3 months. The reason we suggest this is because when someone gives us a timeframe… it's really just a timeframe. Because of that, you should not take it literally. That's how you miss it! **Every call either ends with an appointment set or a new follow up task set so no one falls through the cracks.**

2. **Set up property searches:** Put anyone who mentioned buying in the next 12 months on a property search.

**After tasks and/or property searches are set up, *every* contact should be put on a SmartPlan.**

**SmartPlans are automated follow-up plans/touches that require minimal effort and take less time.**

Suggested SmartPlans for all contacts:

1. **Quarterly Call Plan -** Adds a call task quarterly
2. **Monthly Neighborhood Nurture** (for contacts with addresses) - Automatic email that goes out monthly with information about the area based on the address in the contact record
3. **Birthday SmartPlan -** Adds touch tasks for a contact's birthday (this has the ability to send automated texts)

These SmartPlans do not complete your full 36 Touch, but they lay the foundation for purposeful connections. Doing these three plans intentionally will be far more powerful and effective than running a full 36 Touch inconsistently with less one-to-one contact.

**PRO TIP:** If you want more ways to follow up with your database and lead generate, find all of the Playbooks on KW Connect.

*KW Answers Help:* *Using SmartPlans* *Creating Tasks* *Setting up Property Searches*

# *CONGRATULATIONS!*

Once you complete these steps you will have organized your database, identified new opportunities, and set up SmartPlans to nurture your database moving forward.

In life and business, the overarching goal is to maximize your potential. Running a **powerful** database is the ***one thing*** to help you do just that.

> *"Your database is your business"*
>
> \- Gary Keller