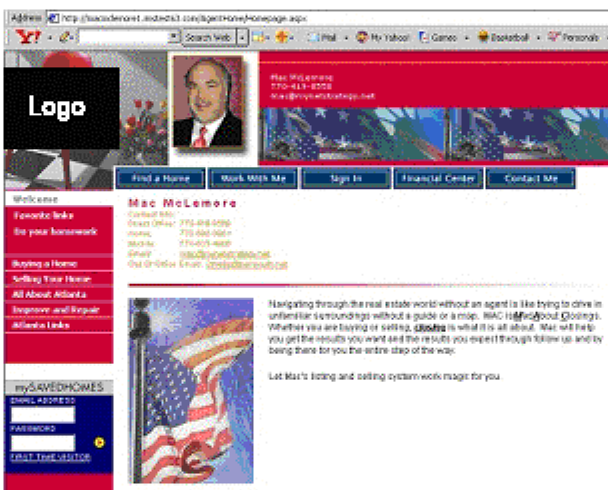
USING YOUR AGENT SITE TO ATTRACT AND RETAIN CLIENTS

AGENT MANUAL



NEED HELP? For web site help, call **1-866-462-6912** or send an e-mail to **support@mynetstrategy.net**

PART 1 – ATTRACTING CLIENTS

USING THE UNIQUE WEB ADDRESS FOR A LISTING

Each listing on your site has its own web site address. The format for the address is as follows: http://www.domainname.com/MLS#

For example, if John Smith has a listing with the MLS # 0001138, the web site address for that listing would be: http://www.johnsmith.com/0001138

There are several ways to use this critical tool to your advantage.

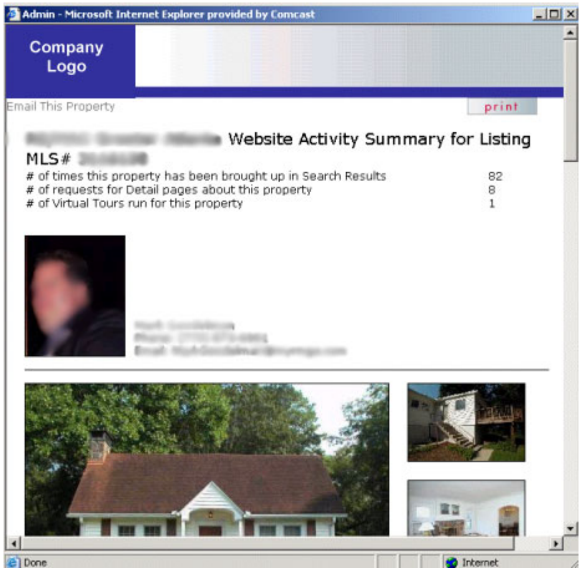
- For each of your listings, include the web site address on the yard sign. John Smith could add a message to his yard sign that reads, "Photo Gallery Tour of this home at http://www.johnsmith.com/0001138"
- John could also get 250 business size cards for the seller to hand out containing the following message: "See a Photo Gallery Tour of MY HOME FOR SALE at http://www.johnsmith.com/0001138".
- Include the listing web site address on the flyers that go in the flyer boxes. Neighbors could pick up the flyer and be impressed enough after visiting your site to keep you in mind when they are ready to sell.
- Include the listing web site address on your print ads.

HIGHLIGHTING THE TRAFFIC TO YOUR LISTING

The agent site admin allows you to access listing reports that will show how many potential buyers are viewing a particular listing on your site. You may want to use this report as a means for showing your clients that you are providing an exceptional level of exposure for their home.

After logging into Management Center and clicking on **Website Administration**, click on **My Listings** in the **My Tools** menu located on the left side of your agent admin page.

Then, select the desired listing and click on **Listing Report**.



The listing report will show you how many times the property has come up in search results as well as how many times people have clicked on the listing to view the details and additional photos. In addition, if you have a Virtual Tour on the property, the report will tell you how many times potential buyers have viewed the tour. The report includes a **Print** button so you can easily print the report. You may also click on **Email This Property** to email the report to your client.

NOTE: This report is only available on the Platinum agent site.

TYING IT ALL TOGETHER

HOW TO INCORPORATE YOUR SITE INTO YOUR LISTING PRESENTATION

Below you will find a Listing Presentation Script that will help you communicate the ways your agent web site will help you provide a superior level of service to your clients.

Listing Presentation Script

Mr. and Mrs. Jones…

As soon as we can get this listing agreement completed, in addition to all of the traditional marketing methods, I will begin extensive marketing of your home on the Internet 24 hours a day, 7 days a week, to sell your home quickly (at your price).

Your home will be marketed on some of the most successful Real Estate Web Sites in the area, but most importantly, if I list your home, your home will have its **own unique web site address- (<u>domainname/mls#</u>)**

Your home will be marketed on…

- **Realtor.com**… preferred vendor for the NAR
- **Our company web site**
- **My Personal Web Site**… **I personally market extensively in the local area, and your home will be one my featured listings appearing on my home page.**

Now, if we can get this agreement completed today I will begin marketing your home to thousands of potential prospects on the Internet, with your own unique web site address.

PART 2 – RETAINING CLIENTS

VIEWING YOUR NEW LEADS

Management Center will help you keep track of the leads generated from your agent site. When you first log in to your management center, you will start in the **Home** section, where you can view new leads *.

NOTE: Leads only appear in this section if they have registered within the last two weeks. If you receive notice of a new lead that you do not see in this section, it likely means a return visit and a new form submission by a customer who actually registered on your site previously.

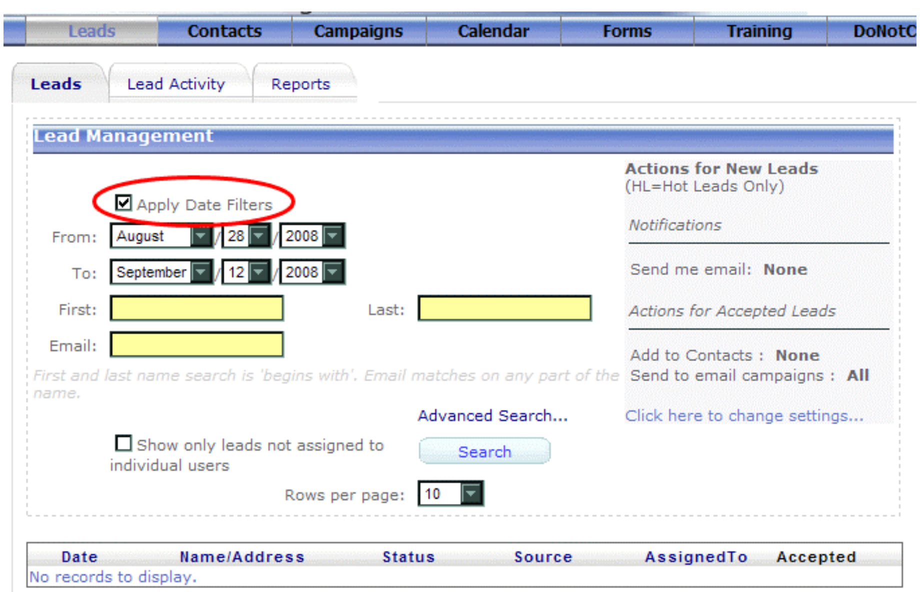
* Available with the Platinum Agent Website Package

VIEWING YOUR EXISTING LEADS

To view both your new and previously received leads, click on **Leads** in the Management Center menu bar. You can use the drop down boxes to pick a date range or the text fields to search on customer first name, last name, or email.

NOTE: Only if you uncheck the **Apply Date Filters** box or set a new date range, can you see leads older than the default 2 weeks display.

Click the **Search** button to see a list of leads based on the search criteria you selected, then click on the person's name to view the lead information.

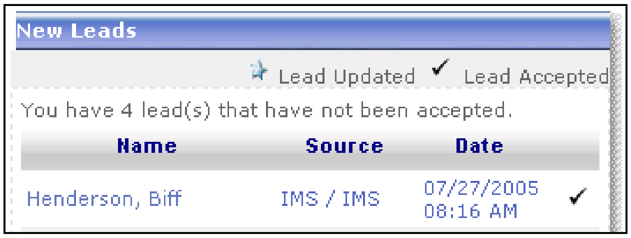


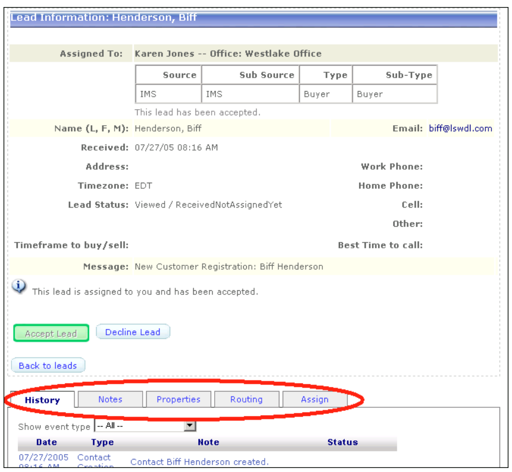
The Status column will let you know if you have previously viewed the lead. The Source column tells you whether the lead came from your User Website or was assigned to you from the Company Website. Leads from your website are automatically accepted and display a check to right of the date. Company Website leads may need to be accepted if they do not display the check.

You need to view the lead information in order to accept leads.

VIEWING INFORMATION FOR A SPECIFIC LEAD

Whether you are in the **Home** section or the **Leads** section, click on the person's name to view information about that lead.





The lead information screen will show you details such as date and time received, contact information entered and a message (if applicable). In addition, there are helpful tabs located at the bottom of the lead, including:

History – shows you all of the activity associated with the lead (lead creation, assignment to e-mail campaigns, etc.)

Notes – allows you to add additional notes for future reference.

Properties – allows you to see a list of the properties associated with the lead..

Routing – allows you to manually make the lead a contact (see next page) or send the lead information to your e-mail.

Assign – allows you to manually reassign the lead to another agent, such as a team member, if you choose.

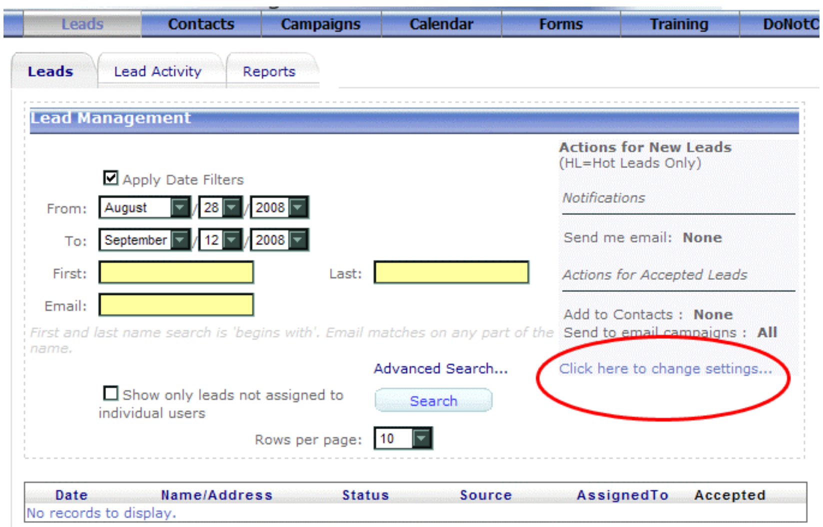
Other – allows you to manually add new fields of information to display about your lead, such as "Wife's Name" or other data that may be useful to see at a glance..

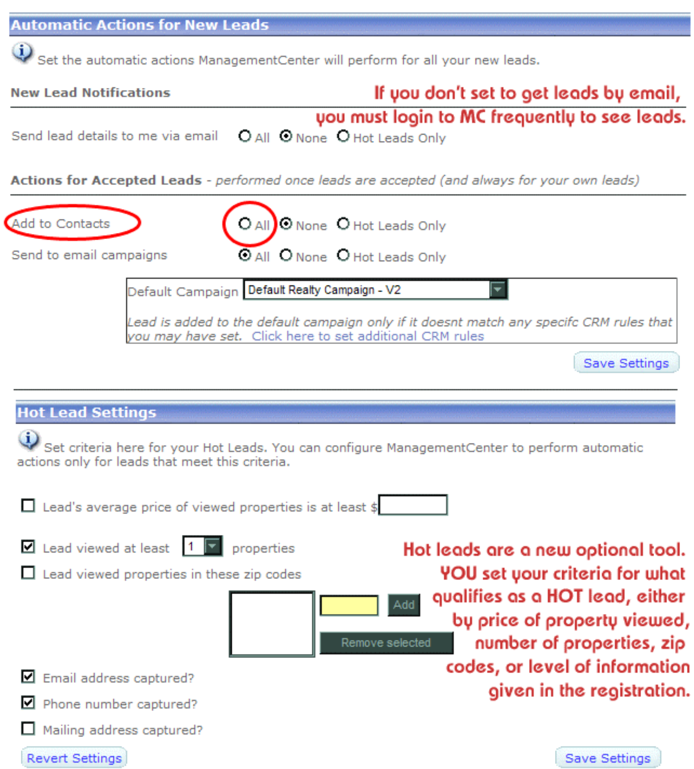
MAKING YOUR LEAD A CONTACT
TWO OPTIONS

Management Center gives you the option of converting a lead into a contact that will be stored in your **Contacts** section. Making a lead a contact will allow you to store additional information about that contact. There are two ways to convert leads into contacts: automatically creating them and manually entering them.

AUTOMATICALLY MAKING A LEAD A CONTACT

You may decide it is easier to have every lead automatically become a contact. You can do this by going to the **Leads** section and locating the Actions for New Leads box, located to the right. You can view your settings, and if you wish you change them, click the "Click here to change settings" link at the bottom.





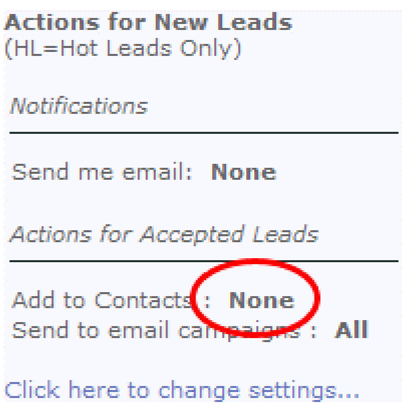
Look for the **Add to Contacts** setting, and select "all".

In this **Automatic Actions for New Leads** menu you can also select to be notified of new leads by email. Select your default Email Campaign, and optionally define a Hot Lead.

Once you have defined a Hot Lead, you can choose to only be notified of leads that meet those criteria, as well as to only place those leads in your contacts or on an email campaign.

Contacts you have manually added or leads automatically routed to contacts via the method above will appear in the **Contacts** section (the Contacts tab is to the immediate right of the Leads tab on the upper menu). Since not all leads are legitimate leads, you may delete any undesired automatically-created contacts by clicking on the checkbox next to the name, selecting **Delete Contact** from the drop down menu and clicking the **Go** button.

MANUALLY MAKING A LEAD A CONTACT

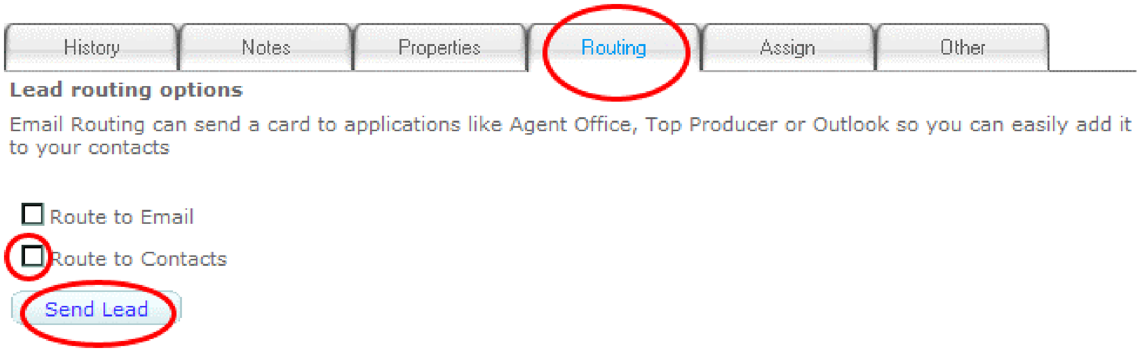


If you don't want to automatically create contacts, make sure **None** is set by the **Add to Contacts** under **Actions for New Leads** found on the right of the Leads section.

(If this is not the case, see page 6 for changing this setting.)

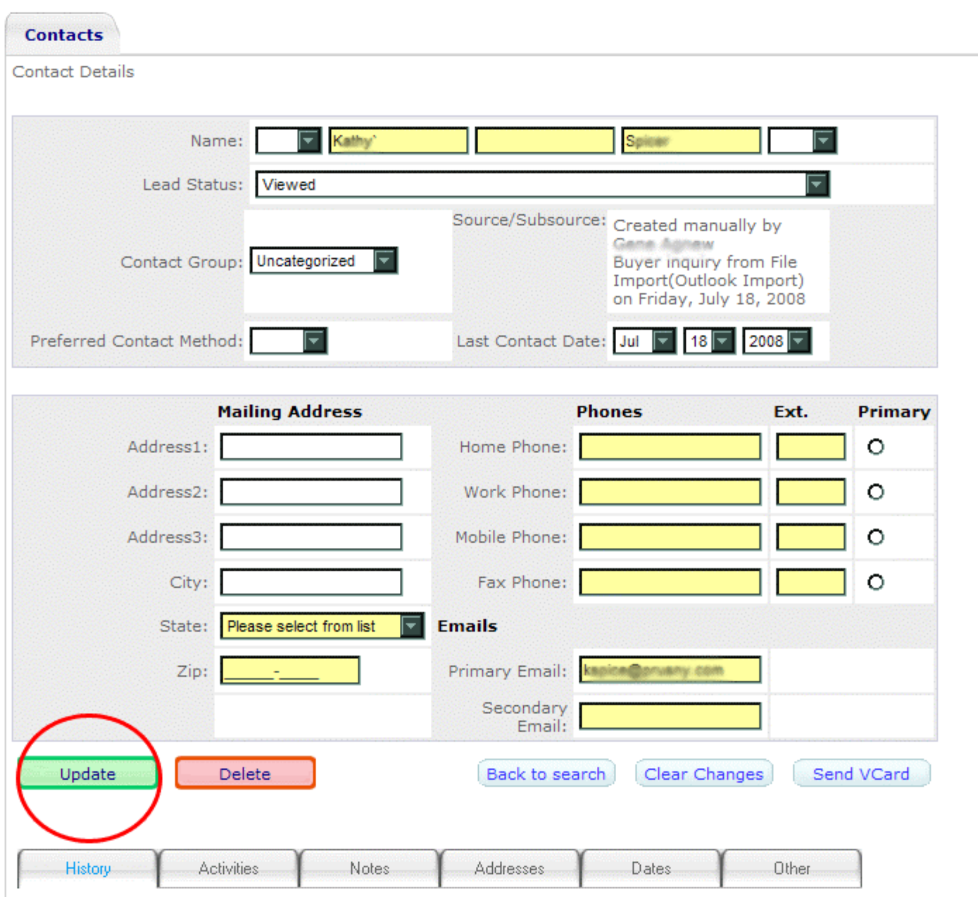
This setting will allow you to manually make a lead a contact once you have determined the lead is legitimate.

If you view the information for a particular lead as described on page 5, you will note that one of the tabs at the bottom of the lead information is the **Routing** tab. To manually make your lead a contact, click on the **Routing** tab, click on the **Route to Contacts** checkbox and click **Send Lead**.



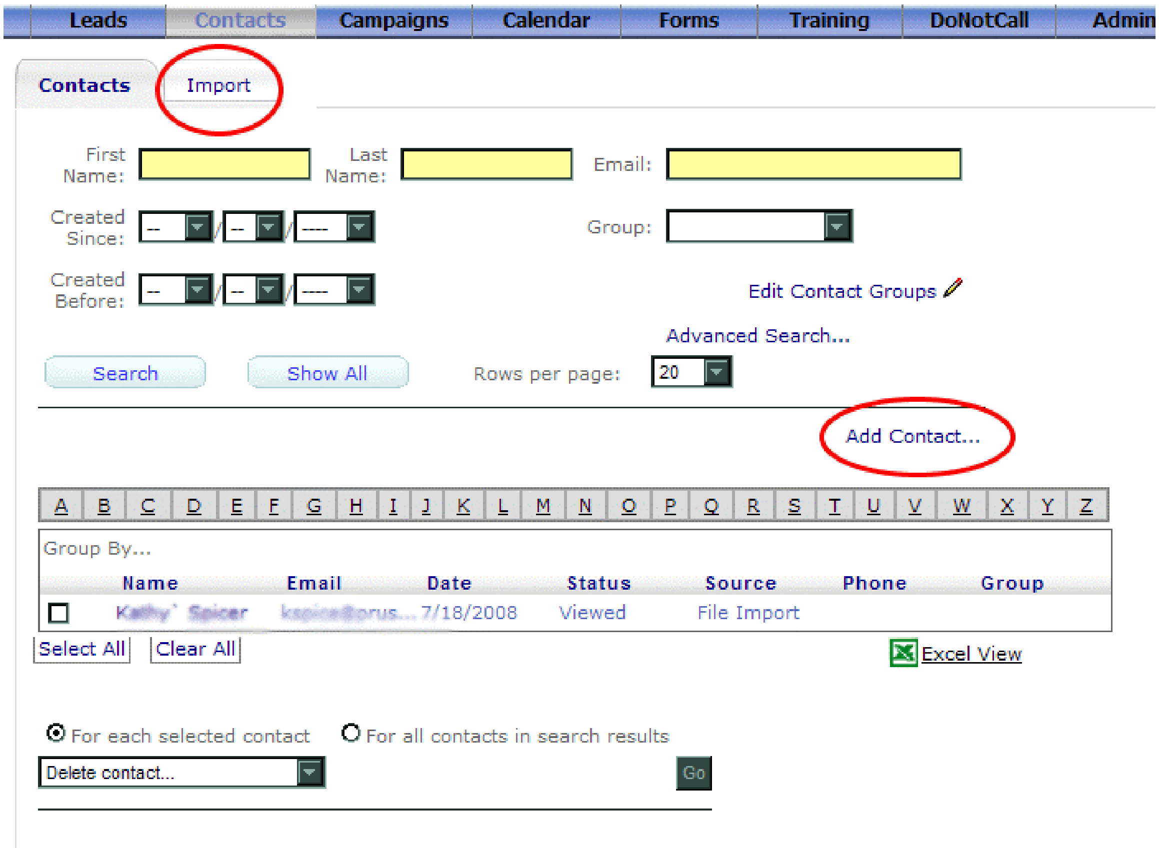
WHY SHOULD I MAKE MY LEAD A CONTACT?

Making your lead a contact allows you to store additional information about that lead, such as address, additional phone numbers, secondary e-mail address, etc.



To add additional information for a contact, find that contact in your **Contacts** section and click on that person's name. When you have entered all of the desired information, click on the green **Update** button.

ADDING NEW CONTACTS



You may find that you wish to enter other individuals who have never visited your site as a contact in your Management Center or to enter a quantity of contacts you have exported from another program, such as Microsoft Outlook.

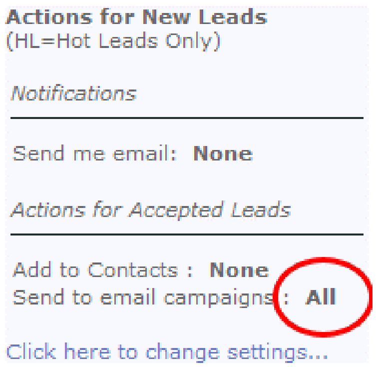
To add individual contacts go to your **Contacts** section and click on the **Add Contact…** link. You will then be taken to the Contact Detail screen (see above screenshot for *Why Should I Make My Lead a Contact?*), where you may enter additional information about your new contact.

To import a quantity of contacts exported from an outside program, select the **Import** tab to see those menu options. Supported imports are from Outlook, Act 6, and Goldmine. If you wish to import from another source, you must be able to export contacts from that source as CSV or “comma separated values.” You may send the exported CSV file to support@mynetstrategy.net for conversion.

NOTE: EMAIL address, first name and last name are required fields for contacts, and files without those cannot be imported into your MC.

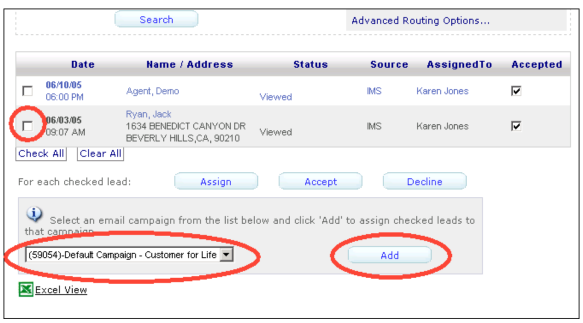
ASSIGNING A LEAD TO CAMPAIGNS

Management Center contains CRM Campaigns that will send periodic email messages to your leads/contacts. Before we examine campaigns and messages in more detail, let's go ahead and learn how to assign leads to campaigns.



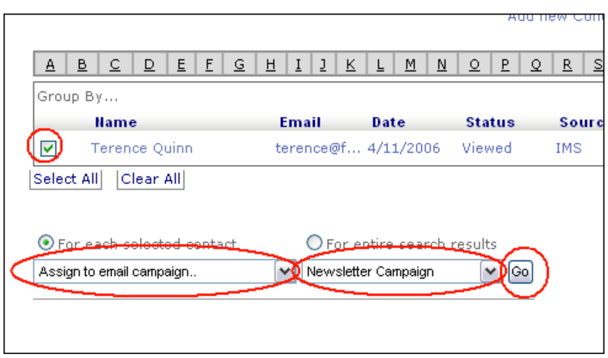
To have all leads automatically assigned to a particular campaign, go to the **Leads** section check your current setting for **Send to email campaigns** located under **Actions for New Leads**. If it is set to **None**, then you can click the **Click here to change settings** link to change it.

In addition to selecting one campaign for automatic routing, you may assign a lead to other campaigns using the manual method.



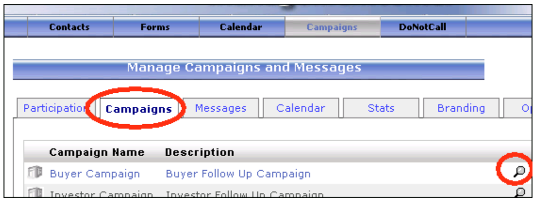
To manually assign a lead to a campaign, find the lead you wish to assign in the **Leads** section and click the checkbox for that lead. Select the desired campaign using the drop down menu located below the list of leads, then click the **Add** button.

ASSIGNING A CONTACT TO CAMPAIGNS



Once you convert a lead into a contact, you may assign that contact to one or more campaigns in the **Contacts** section by checking the box next to the contact name, selecting **Assign to email campaign** in the first drop down menu. This causes a 2nd drop down menu to appear where you may select the desired campaign, then clicking **Go**.

VIEWING EXISTING CAMPAIGNS



You may view a list of existing campaigns for your company by going to the **Campaigns** section and clicking on the **Campaigns** tab. Campaigns consist of a set of **Messages** set to go out over a set amount of time or on a particular date. You cannot edit default campaigns, only campaigns you have created.

VIEWING EXISTING CAMPAIGN MESSAGES

You may view a list of existing messages by going to the **Campaigns** section and clicking on the **Messages** tab. Click on the magnifying glass icon for a message to read that message. You cannot edit the default messages, only messages you have created.

CREATING MESSAGES AND CAMPAIGNS

You have the option of creating your own messages and creating a campaign to which you will assign your messages.

First you must create the messages you will use in your campaign.

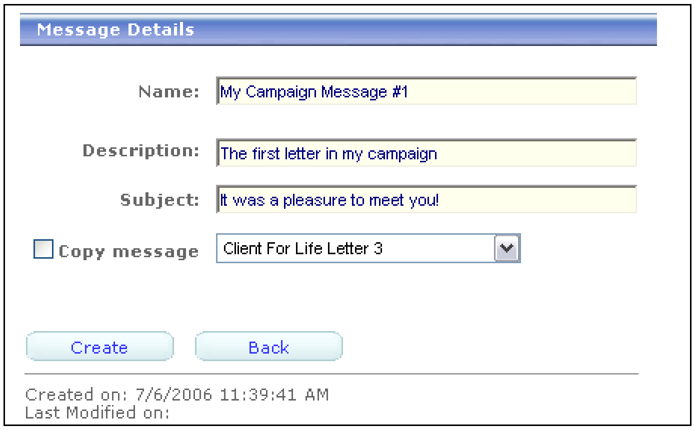
CREATE A MESSAGE

Click on the **Messages** tab, then click on **Add a New Message** to create your message.

If you wish to make **any** changes to a default message or campaign, you must recreate the message and create your own campaign.

You can quickly recreate messages during the next step by choosing one of the default messages to copy by selecting the message name from the drop-down and marking the **COPY MESSAGE** box (see illustration below).

If you want to create a unique message, do not check this box and you will begin with a blank message.



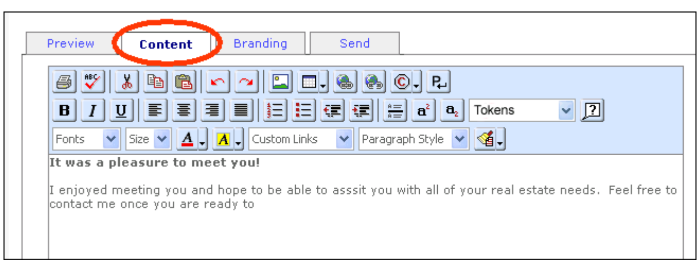
Name your message, add a description and enter the subject (which will show in the subject field of the email).

NOTE: While you are unable to edit existing messages, you may copy existing message text into your new message by clicking the **Copy message** checkbox and selecting the desired letter using the drop down menu.

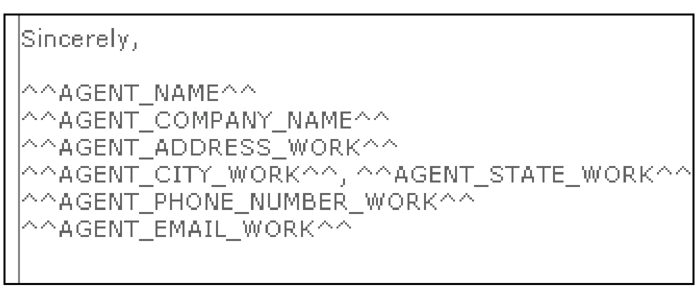
Click the **Create** button to move on to the next step.

The **Create** button will then change to **Update** and you will see your letter below the buttons. You will start with the **Preview** tab, which allows you to choose a **Theme** and a **Layout** using the drop down menus.

You will not edit your letter on the **Preview** tab, but you can get an idea of what the letter will look like when it goes out to your client.



Click on the **Content** tab. You will use a word processor type interface to edit the existing message you copied or to type your new message.



Use the **Insert Code Snippet** option (third icon from right in middle row of icons) to add code snippets to your letter that will pull info such as your contact info directly from the database so it will remain current. You can directly type your name and information on each message, but if the information is ever outdated, you will have to edit each of your messages.

Once you have finished with your letter, click the **Update** button above the tabs to save your changes. You may preview your letter, but don't forget to click Update to actually save changes before moving to another section.

Repeat this process for each additional letter you wish to create.

CREATE A CAMPAIGN

To make use of the messages you create, you will need to create a new campaign to which you will assign the messages. Click on the **Campaigns** tab and click **Add a New Campaign** to create your new campaign.

Enter a Campaign Name and a Description for the campaign.

You may copy an existing campaign, but it is best to not use this option if you wish to set up existing letters on your own schedule.

Click on the **Create** button when finished.

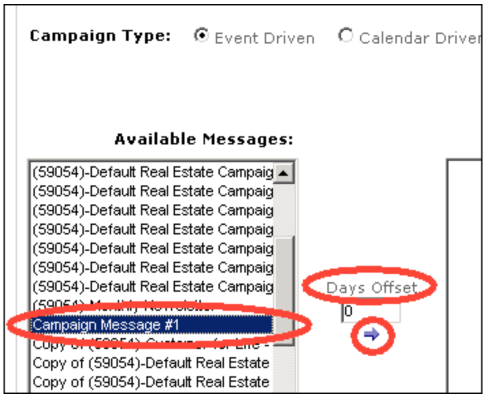
On the next screen, you will have the option of selecting a Theme and Layout for all of the letters associated with the campaign you creating.

Click on the radio button for the desired campaign type.

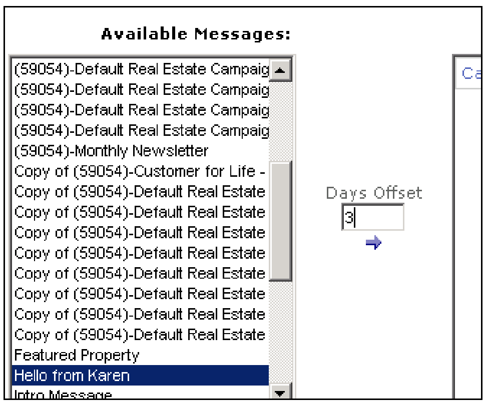
The three types of campaigns are:

Event Driven Campaign

Each letter is sent a certain number of days after the campaign starts. To create this type of campaign, select the message that you want for the first message in the campaign. If you want the message to go out on the day that the campaign starts, leave **Days Offset** at "0" (see screenshot on next page).



Click the blue arrow button to add the message to your campaign. The message will show up in the **Messages in Campaign:** box to the right (see example below).



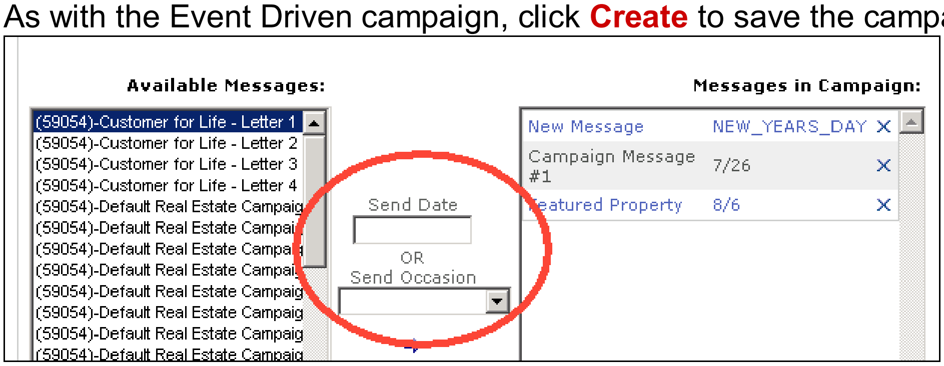
Select the second message in your campaign. If, for example, you want this message to go out three days after the start of the campaign, change **Days Offset** to “3” and click the blue arrow button to add the message to the campaign.

Repeat this process until you have added all of your desired letters to the campaign.

Once you have added all of your letters, click the **Create** button located beneath the **Available Messages:** box to save the campaign.

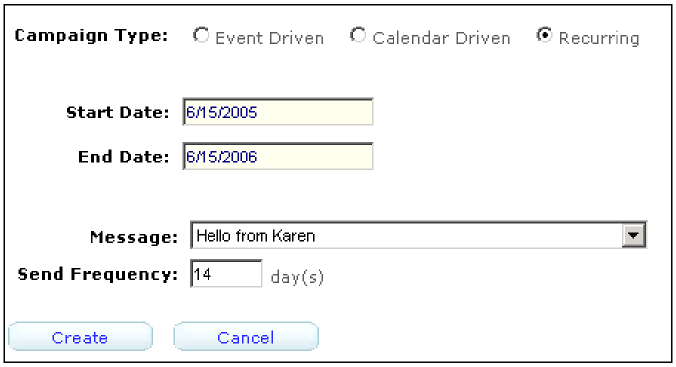
Calendar Driven Campaign

Each letter is sent on a specific calendar date. You will set up a Calendar Driven campaign in the same way that you set up an Event Driven campaign, except that you will designate an exact date for each message to go out rather than set a Days Offset value. In addition, you may send out letters for occasions such as New Year’s Day or Thanksgiving by using the **Send Occasion** drop down menu. As with the Event Driven campaign, click **Create** to save the campaign.



Recurring Campaign

This campaign is used for one letter, which is sent out periodically (every 14 days, for example).



Select the **Start Date** and **End Date** for the campaign, select the letter you wish to use for the campaign and designate how often you want the letter to be sent.

Click the **Create** button to save the campaign.

BUILDING A PIPELINE FOR THE FUTURE

HELPFUL IDEAS TO GET THE MOST OUT OF YOUR AGENT SITE AND MANAGEMENT CENTER

Now that you have learned how to use your agent site and Management Center, you may start thinking in terms of how you can use these tools to grow your business. Here are some helpful suggestions:

Use Your Sphere of Influence

Every realtor has a sphere of influence, but the average realtor only has email addresses for about 20% of those in that sphere. How do you change that? Get a blank legal pad. Start naming everybody you know - friends, family, neighbors, people at church, etc. Make the first sheet the A's, the second sheet the B's, and so on. As you have time, gather email addresses for every one you write down on your pad, add them as contacts in Management Center and assign them to a campaign.

Use Your Business Cards

Hand out five business cards to people you don't know every single day. Doing so could net you one or two more closing per year. Include offers from local restaurants or merchants on the back of your cards so people will have a reason to keep them. Be sure to include the domain name for your site on the card.

Use a Special Promotion

Go to a local fine dining restaurant around 4:00 in the afternoon (the restaurant will likely not be busy yet and the owner or manager is almost always there). Ask for 5 minutes of the owner or manager's time and ask their permission to do a mailing featuring their restaurant and offering a free dinner for two. If you get the green light, ask if the restaurant will comp the dinner. Chances are, the restaurant is willing to do so because it will only cost them the cost of the food and is an inexpensive way to advertise. Put together your mailing and target an area of 500 people. On the postcard include information about you and your site and include a message that reads, "Send me an e-mail and be registered for a free dinner for two". Note that the recipient's chances of winning are 1 in 500 (or better depending on how many people respond. On the average, 40% of those who receive the postcard will respond and you can then set those people up as contacts in Management Center.