Advocate Marketing

Advocate marketing: Learn how to create groups in outlook, how to import into outlook, how to set up folders and rules for incoming mail to make the management of your prospects easier, how to find properties and create labels in tax rolls, how to collect names of REALTORS in your farm area and contact information, how to do reverse prospecting to find buyers for your listings, how to search for rentals in NTREIS Listings and create labels from rentals. How to find advocates using the MLS database with a custom search and custom report. Learn what 1 change you could make that will guarantee referrals from your current clients.

Outlook Groups

We use groups in outlook for various reasons. For today's class we are planning for your farming and networking opportunities. The process is the same. The contacts should be in outlook. You may import a list of contacts from any list to the **Address Book**

Import a list of contacts into Outlook

1. In Word, create or open the list of contacts you want to import into Outlook.

   The information for an individual contact should be separated by tabs or commas, such as *name, address, city*.

2. On the **File** menu, click **Save As**.
3. In the **Save as type** box, click **Text Only (*.txt)**, and then click **Save**.
4. Close the document.
5. Switch to Outlook.
6. On the **File** menu, click **Import and Export**.
7. Follow the instructions in the Import and Export Wizard.
8. If you have your list in Excel,
9. On the **File** menu, click **Save As**.
10. In the **Save as type** box, click as Comma Separated Value. (CSV)

11. Close the document.
12. Switch to Outlook.
13. On the **File** menu, click **Import and Export**.
14. Follow the instructions in the Import and Export Wizard.

15. Note: You may need a system disk when trying to import. Now that you have a list of contacts in your outlook program, you may group them in appropriate and useful ways.

Create a group in the Address Book

1. On the **Tools** menu, click **Address Book**. (Or CTRL + SHIFT + B to open the **Address Book.)**
2. On the **File** menu, click **New Group**.
3. In the **Group Name** box, type the name of the group. (This might be a subdivision name or "Family" or a committee name or all of the managers. You see the idea? Think of groups that would be useful. Maybe people in certain zip codes or areas?
4. To select one or more names from the Address Book, click **Select Members**.
5. Click a name in the list, and then click **Select**.

Using a group in the Address Book

1. To use a group from the **Address Book** in Outlook. Start as you would to create a new e-mail message. Then you may either type the name of the group or click the TO button and click on the name of the group.
2. Remember to respect your groups and give them an opt-out of the group in your e-mail, every time. If you are sending Flyers for Just listed, Just sold, information or even Open houses, please use **ADV:** in the subject line. This respects the anti-spam rules set out by the government and is a requirement.

Tools/Rules:

When you start to use groups you will increase the amount of "Good e-mail" so it's important to be able to find it when it appears through all of the spam that may be in your mailbox. MS Outlook has a neat tool that will help you do this. It's called the **Rules Wizard.** This wizard will let you decide where to find inbound mail. So if you set up a rule for a particular subdivision (name) it may say that any mail received from a particular person or with a particular word in the subject line should go into a particular folder. Then all you will do is visit that folder each day. This is particularly useful in conjunction with the prospecting function of NTREIS listings, as you'll see later.

The long way works: Select multiple items

- To select adjacent items, click the first item, and then hold down SHIFT and click the last item.
- To select nonadjacent items, click the first item, and then hold down CTRL and click additional items.
- To select all items, click the **Edit** menu, and then click **Select All**.

Notes

- The **Select All** command is available only in a table, card, or icon view.
- To select items in a card view, click the card heading for each item you want selected. If the item isn't visible, click a letter or number on the right side of the window. For example, to view a contact filed under the last name Myers, click the **m** button.

Tools/ Rules Wizard (find this while in your Inbox)

Most of the instructions say just follow the rules in a wizard, but I want to share some things I've learned about this Wizard.

1. Click on NEW (button on the right)
2. Select the kind of rule that you want to create. It will highlight "Check messages when they arrive" This is a good rule to start with.
3. Click on NEXT (at the bottom of the box)
4. Select the "condition". If you slide down the list you will see "with specific words in the subject line, you may click on the box to the left of the condition. You will see it added to the box at the bottom of the bigger gray box. (This is where you are creating the entire rule.)
5. Next click on the underlined words Specific words (in this example).
6. Now type the words that you are expecting. (It might be a subdivision name or names of a family "Jones", maybe a committee name.) Then click add and ok.

7. When you click next it will ask you what you want to do with the message. It will highlight "move it to the specified folder."

8. Remember to click the box to the left of the specified folder and when it moves to the bottom box click on specified folder to select a folder where these messages will be sent upon arrival.

9. This same procedure will help you control the unwanted spam message that you receive. Just use the keywords that are in the subject line of junk mail. You may add to any rule at any time.

10. Before you send the first message think of the opportunities in sending that message and include a signature. It's

Free Marketing: Create multiple signatures for messages

1. In a Word document or an e-mail message, click **Options** on the **Tools** menu, and then click the **General** tab.
2. Click **E-mail Options**, and then click the **E-mail Signature** tab.
3. In the **Type the title of your e-mail signature or choose from the list** box, type a name for your signature. (It might be business, family, buyers, sellers, designations, etc.)
4. Under **Create your e-mail signature**, insert the text and/or pictures you want to use for a signature. (Yes photos too! Remember the file sizes are important.
5. Click **Add**.
6. To create another signature, click **New**, and then repeat steps 3 through 5.

Note You can now insert a signature in a specific message, or automatically add a signature to the end of every message.

Create stationery

This procedure is only available if you use HTML as your message format. For information about selecting a message format, click: .

1. On the **Tools** menu, click **Options**, and then click the **Mail Format** tab.
2. In the **Send in this message format** box, click **HTML**.

3. Click **Stationery Picker**, and then click **New**.

4. In the **Enter a name for your new Stationery** box, enter a name.

5. Under **Choose how to create your Stationery**, select whether to start from scratch or use existing stationery.

   To select a file to base your stationery on, type the path and file name in the **Use this file as a template** box or click **Browse** to select from a list.

6. Click **Next**.

7. Select the options you want to use.

   For Help on an option, click the question mark , and then click the option.

Notes

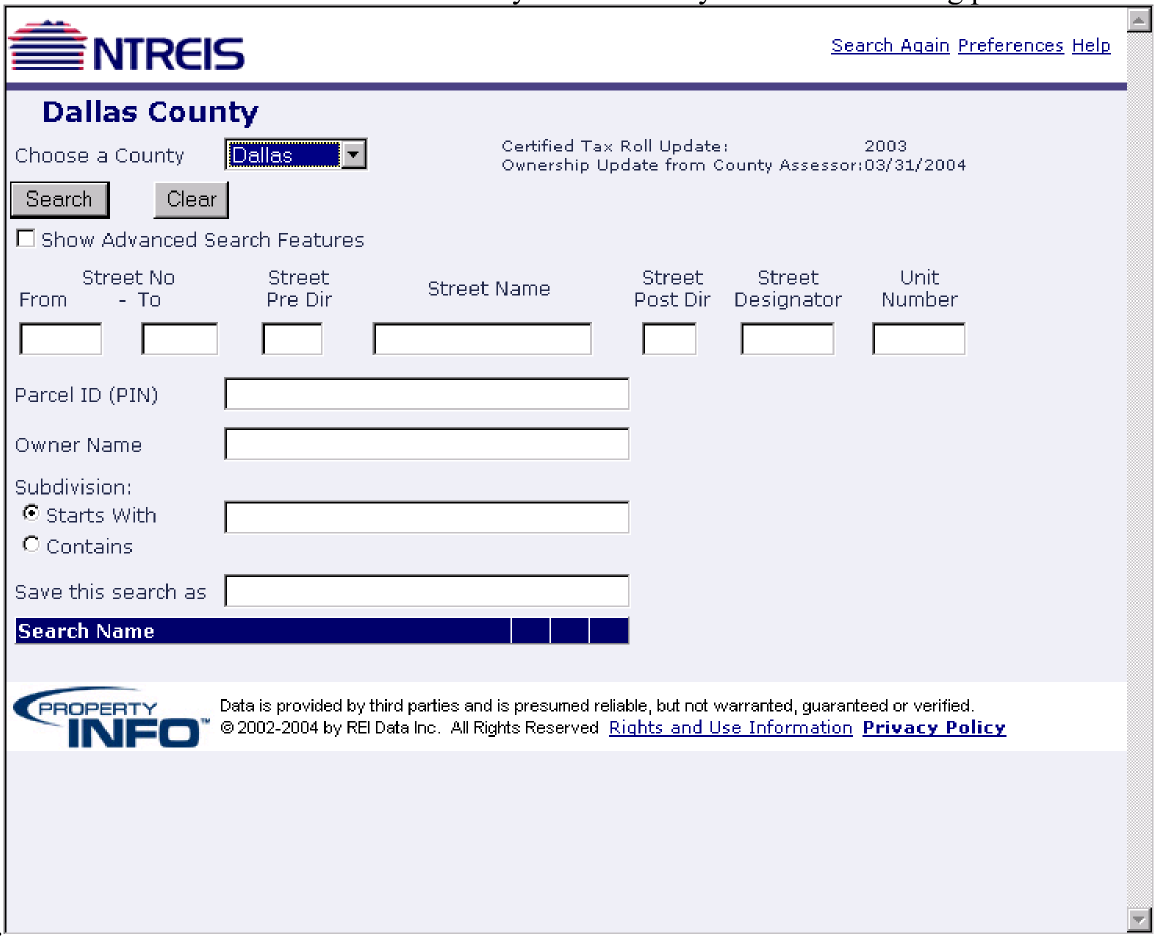
- If you like the stationery in a message that you received from someone, you can save it as your own stationery. In the message, click the **File** menu, click **Save Stationery**, enter a file name, and then click **OK**.

Searching taxes and creating labels.

1. Login to NTREIS listings or Listing Manager Pro. Select Tax from the menu.

2. Select the county and choose the search criteria. To select a residential farm, you may want to search by subdivision. Note: the common name may not be the legal name of the

subdivision so an address search to verify the name may be a useful starting place.


NTREIS

Search Again Preferences Help

Dallas County

Choose a County: Dallas

Certified Tax Roll Update: 2003
Ownership Update from County Assessor: 03/31/2004

Search | Clear

Show Advanced Search Features

From	Street No - To	Street Pre Dir	Street Name	Street Post Dir	Street Designator	Unit Number

Parcel ID (PIN)

Owner Name

Subdivision:
Starts With
Contains

Save this search as

Search Name

PROPERTY INFO™

Data is provided by third parties and is presumed reliable, but not warranted, guaranteed or verified.
© 2002-2004 by REI Data Inc. All Rights Reserved Rights and Use Information **Privacy Policy**

.

2. If there is more than one version of the subdivision name they will all present for you to choose from. Just click the correct one and click search. The list will appear on the screen.
3. Notice the total is at the top left of the screen. Also note that there may be more than 1 page at the bottom left. Labels will print 1 page at a time. Click on select page and then proceed to create labels by moving to the bottom of the page:

4. Select the label style, which address to use, if you would rather not use the name of the owner, use a phrase like Dear neighbor, resident or friend and hide the owner's name

(check the box!)

5. Then click 

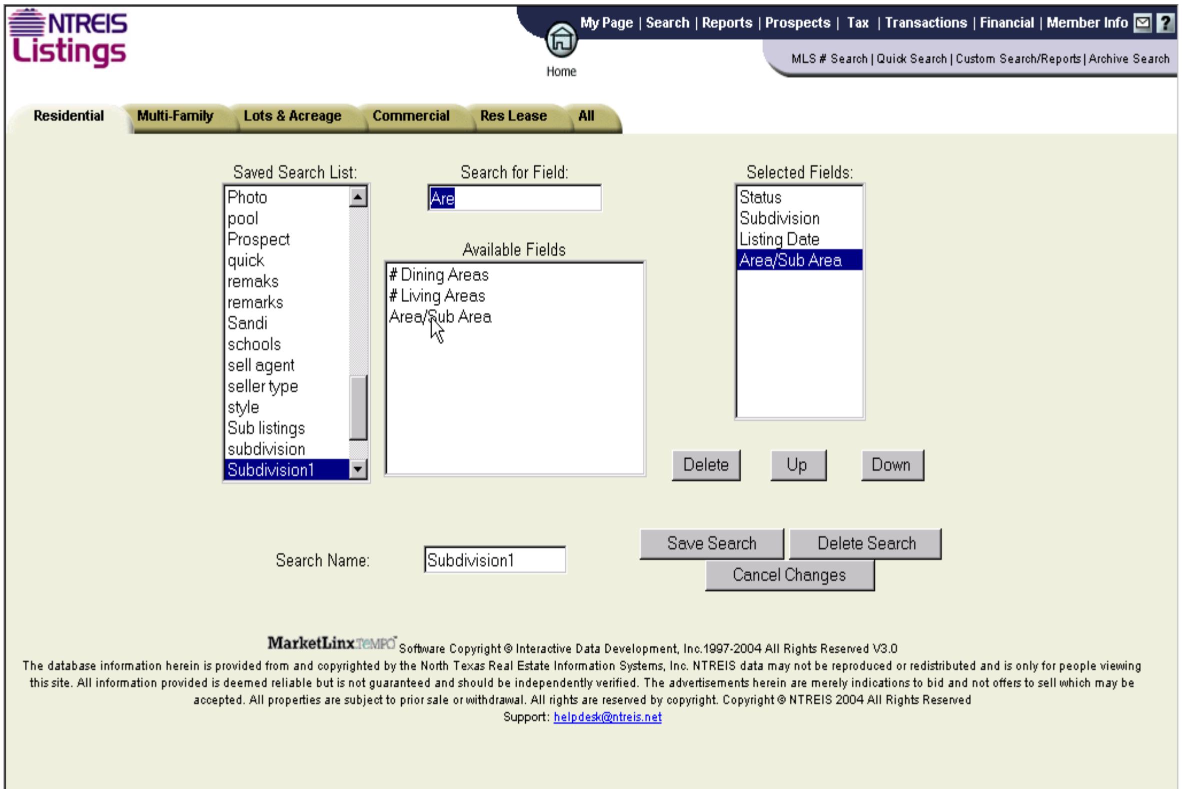
. Repeat the process for each page of labels that you desire. When the labels appear on the screen you may print them. You may use a generic label just match the Avery code number to the package and it will be the proper size. When this document was created the labels were not appearing on the screen. It has been reported. 10/05/04.

Custom Searches give you complete control.

To set up a search that will give you the contact information for other REALTORS that work the same areas that you do.

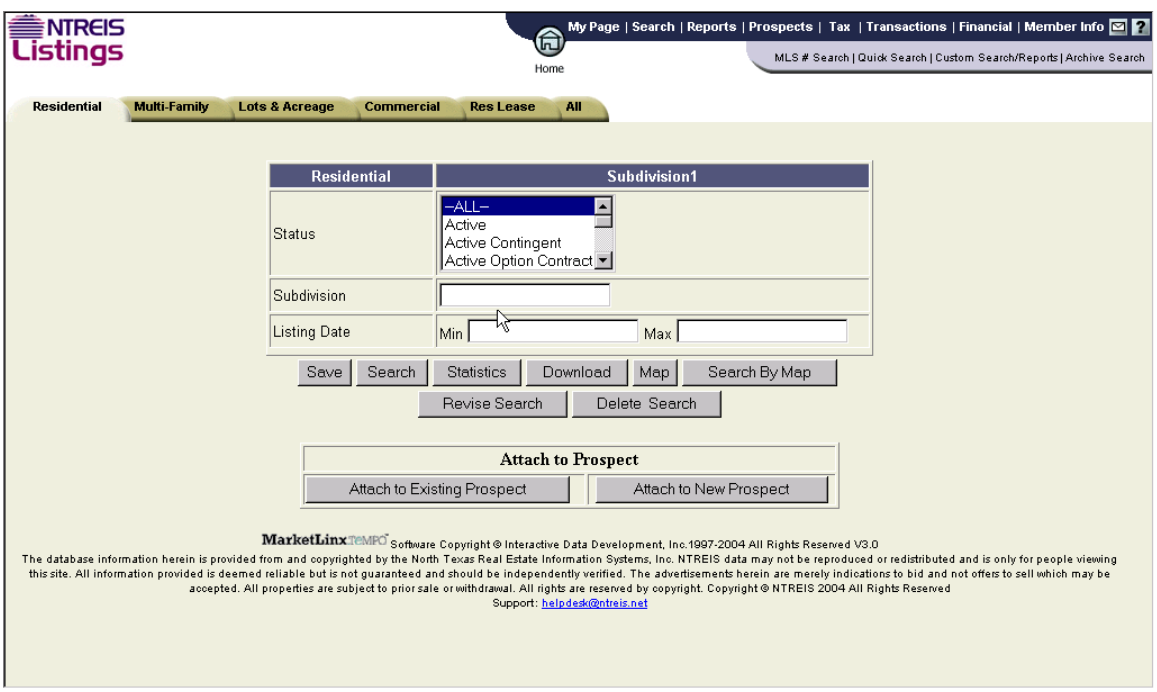
1. Search Custom search and reports
2. In the center box type ARE then click on AREA in the bottom center box it will move this field to the right.
3. Repeat for subdivision,
4. Repeat for status. (This status will give you the Listing agent and the Selling agent (buyer agent) on each listing, you might want to include a date field to narrow the number of listings returned to your search.)

5. Name the search "Subdivision"

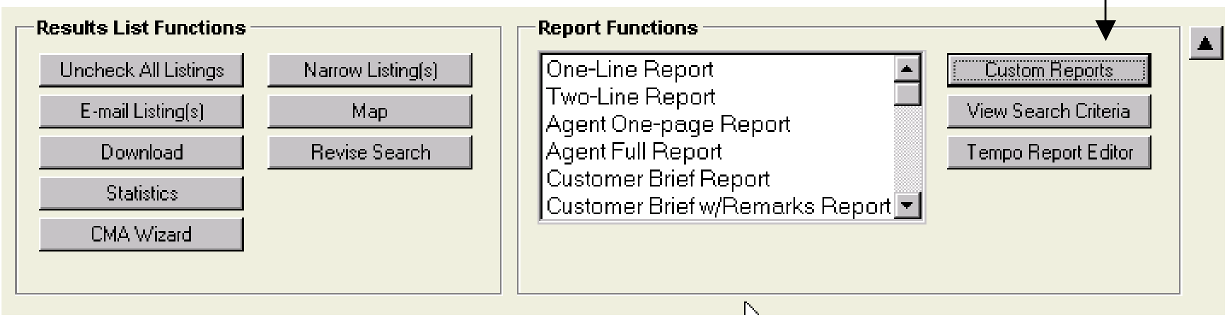


6. Then Click on 

The screen will change and return the actual search screen where you will fill in the criteria. Status SOLD, Subdivision name, if you need a wildcard, use the %. Enter the Date.



6. When the search results return to the screen you will have a choice at the bottom to create a custom report.
7. Please click here.



8. It will look very familiar when the next screen appears.
9. You will want to type Agent and select the fields that will give you the contact information on the agents. Their name, id, phone numbers, address, e-mail, web info. This is the competition so take what you can and learn about them. They may have some ideas that you need to know about! You are in a good position to be able to compete powerfully against them.
10. Here is an example of the fields that are available for your use:

Residential Custom Report: *Agent Report*

RES								
RES	Mls #	Status	LO Phone	LA Email	LA Full Name	SO Phone	Selling Agent ID	LA Web
1	10149249	Sold	(214)376-7000	loneal4378@aol.com	LINDA ONEAL	(972) 222-5227	0407236	
2	10055266	Sold	(972)270-4411	tomtsmith@hotmail.com	THOMAS SMITH	(972) 222-5227	0407236	
3	10124354	Sold	(972)224-9221	rusty@rustygraham.com	Rusty Graham	(972)476-6706	0207883	
4	10028871	Sold	(972)712-9898	janrichey@kw.com	JAN RICHEY	(972)931-9000	0484760	www.janrichey.com
5	10042700	Sold	(972)732-6000	joynees@sbcglobal.net	Joy Nees	(214)363-2500	0269779	
6	10088694	Sold	(972)385-0550	hjcole@selrltygrp.com	HJ Cole	(972)315-7995	0307656	http://www.selrltygrp.com
7	10059335	Sold	(972)596-9100	marthar@airmail.net	Martha Robertson	(972) 599-7000	0507522	
8	10051188	Sold	(972)735-9600	charleneshippy@ebbyhalliday.com	CHARLENE SHIPPY	(972) 599-7000	0448422	
9	10028226	Sold	(972) 599-7000	barb@barbglass.com	Barbara Glass	(972)980-6600	0202979	
10	10145254	Sold	(972)931-9000	maryellen.peter@prurealty.com	Mary Ellen Peter	(972)735-9600	0237687	http://www.maryellenpeter.com
11	10062904	Sold	(972)712-9898	janrichey@kw.com	JAN RICHEY	(972)208-9200	0327320	www.janrichey.com
12	10041763	Sold	(972)735-9600	maudegleason@ebby.com	Maude Gleason	(972)608-0300	0496595	
13	10097412	Sold	(972)387-0300	cindyogorman@ebby.com	Cindy O'Gorman	(972)208-9200	0327320	http://ebby.com/agent/cindyogorman
14	10060729	Sold	(972)403-2000	tracye@trlhomes.com	Tracye Levit	(972)991-1616	0409018	
15	10042827	Sold	(972)991-5478	andrew@bigDrealty.com	Andrew Montoya	(972)735-9600	0248234	www.bigDrealty.com
16	10091388	Sold	(972)931-9000	d.timm@prurealty.com	Dona Timm	(972)618-7500	0496066	http://www.donatimm.com
17	10139731	Sold	(972)732-6000	bettymckean@comcast.net	Betty McKean	(972)312-9000	0429712	
18	10050027	Sold	(972)874-1905	moniqued@kw.com	Monique Dykstra	(972)874-1905	0505110	
19	10089512	Sold	(972)387-0300	pg@paulettesellsdallas.com	Paulette Greene	(214)692-0000	0429771	
20	10055861	Sold	(972)732-6002	donlin13@juno.com	Linda Ogden	(972)732-6002	0469954	
21	10040354	Sold	(972)248-8800	jstoller@sbcglobal.net	Jack Stoller	214-800-8420	99999999	
22	10044384	Sold	(972)712-9898	barbd@kw.com	Barbara Deltuva	(972)387-0300	0417258	
23	10064505	Sold	(972)874-1905	shirleyw@kw.com	Shirley Williams	(972) 867-8585	0241317	
24	10068106	Sold	(972)387-0300	pg@paulettesellsdallas.com	Paulette Greene	(972)380-0022	0411560	
25	10066937	Sold	(972)387-0300	cindyogorman@ebby.com	Cindy O'Gorman	(972) 599-7000	0372816	http://ebby.com/agent/cindyogorman
26	10043706	Sold	(972)712-9898	janrichey@kw.com	JAN RICHEY	(972)387-0300	0363087	www.janrichey.com
27	10101465	Sold	(972)596-9100	cindybcamp@aol.com	Cindy Camp	(972)769-9400	0495047	
28	10037354	Sold	(972) 867-7666	fenwick-realtors@airmail.net	VAL FENWICK	(972)403-2000	0485879	planotxhomes.com

11. Remember to save the report and then to use the report just slide down the reports list in the search results screen and click on the REPORT that you have named “agent report”. It will generate a popup report like the one you see above. To print just click File, Print.

12. You may save the file to your hard drive or desktop by clicking on the 

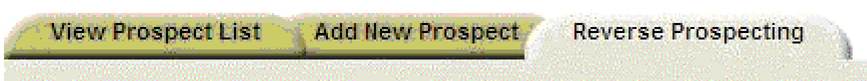
button. It creates a text file that can be imported into Outlook. When you click the download button it will try to place the file on the desktop.

Reverse Prospecting

Once a listing agent has entered a listing and saved it as active, they may then reverse prospect to locate other users who have prospects in the NTREIS Listings system with matching custom search criteria. Note: The listing agent will NOT see the prospect's name, but rather, they will see the other user's name and a prospect id.

To reverse prospect:

Step 1: Click the Reverse Prospecting tab, which appears in the Prospect area, or can be accessed by pointing at Prospects on the Navigation Bar and then clicking on Reverse Prospecting.



Step 2: Choose a listing(s) to view potential prospects for by clicking in the checkboxes in front of your active listings OR click the "Check All Listings" button and then click "Search."

View Prospect List | Add New Prospect | Reverse Prospecting

Your Current Active Listings:

_	Mls No.	Address	List Price	Property Type
1	☐ 701490	4840 OLD MOUNTAIN PARK RD	$ 425,000	Commercial
2	☐ 642963	3905 SPALDING BLUFF	$ 459,000	Residential
3	☐ 650761	490 FIRELITE DRIVE	$ 209,900	Residential
4	☐ 654068	230 PARKSIDE CLUB COURT	$ 269,900	Residential
5	☐ 701228	3646 CHURCHWELL COURT	$ 479,900	Residential
6	☐ 702487	5096 BROADGREEN DRIVE	$ 255,000	Residential
7	☐ 704940	157 SPRUCE STREET	$ 349,000	Residential
8	☐ 709725	9090 CAMPESTRAL CT	$ 829,900	Residential

Check All Listings | Search

If no matching prospect information was found, the system notifies you with a short prompt.

Step 3: To contact the potential prospect, click the other agent's name link and their Information Screen will appear. You could either phone the agent, or click the agent's email link and send an email message. Your message should mention that you found them through a reverse prospect on the MLS system and they are working with a buyer whose search criteria matches your listing. You'd like to tell them a little bit more about the listing and (maybe send a flyer with lots of photos). You might reference the Prospect ID so that they might identify the buyer.

704940	Agent Name	Prospect ID
1	CAREEN A CALDWELL	5403
709725	Agent Name	Prospect ID
1	HEATHER CLANCY	7220

Step 4: Clicking the agent's email address link will open your email client software, with the prospect agent's name already typed in the "To:" field.

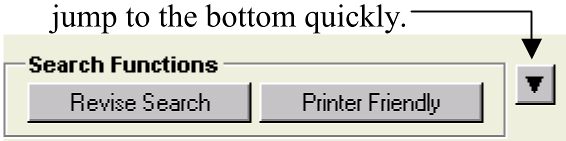
While doing a reverse prospect and making the call or sending e-mail may seem unfamiliar or perhaps (not your job) it will give your seller an extra value added service that you provide. It demonstrates that you are willing to go the extra mile to get your listing sold. Sometimes it takes action to move a listing.

Rentals and how to locate them.

I would choose Listing Manager Pro for this operation because you can set up the Label formats including the fonts very easily. (We will do this in the "Taking the listing every time class" next week.) You can perform the search in NTREIS Listings and do a download to the desktop, which will let you create labels in Microsoft Word.

1. Search Quick search, rentals (select the tab RES LEASE) 

. Enter the area and select LEASED from the status box.
2. At the bottom of the list select Check all listings.
3. To get there quickly look to the top right for these buttons. Click on the down arrow to jump to the bottom quickly.



4. At the bottom of the screen to the right there is a Custom Report button. Click it.
5. Type Street and click on it in the big center box it will move to the right column and become part of the new format
6. Repeat #5 for Street num, Street name, Street dir, City, and Zip code.
7. Save the search as "Label".
8. Go to your desktop and look at the file. It may need some adjustment.
9. Open the file in MS Excel and save the file as an Excel file.
10. It will act like an import. Use the space delimited format and then fix any errors in the columns.
11. Now you can perform a mail merge with MS Word.

Select a mailing label size in MS Word:

1. On the **Tools** menu, click **Envelopes and Labels**, and then click the **Labels** tab.

2. Click **Options**.

3. Under **Printer information**, click your printer type.

4. In the **Label products** box, click the brand of label you want to use.

5. In the **Product number** box, click the number of your label.

6. Click print.

Searching for Advocates in the MLS

You have probably learned something from Steve Goff's classes about advocates that you will be able to apply with just a little help today. When Steve talks about advocates he means people who know you and also know a lot of other people who might be moving. The goal is for you to identify those people and establish a working relationship with them so that they consider you when it's time for referrals.

When I learned about Steve's goal to make your life easier by teaching you to identify Advocates, I started to wonder how I might be able to help you through using the MLS. After an AAHHHAA moment, here it is.

1. Create a custom search, SEARCH, CUSTOM SEARCH,
2. I chose Area, Price, and Status. You might want to add Subdivision, Map page or Zip code to narrow the results.
3. Name the search "Advocates".

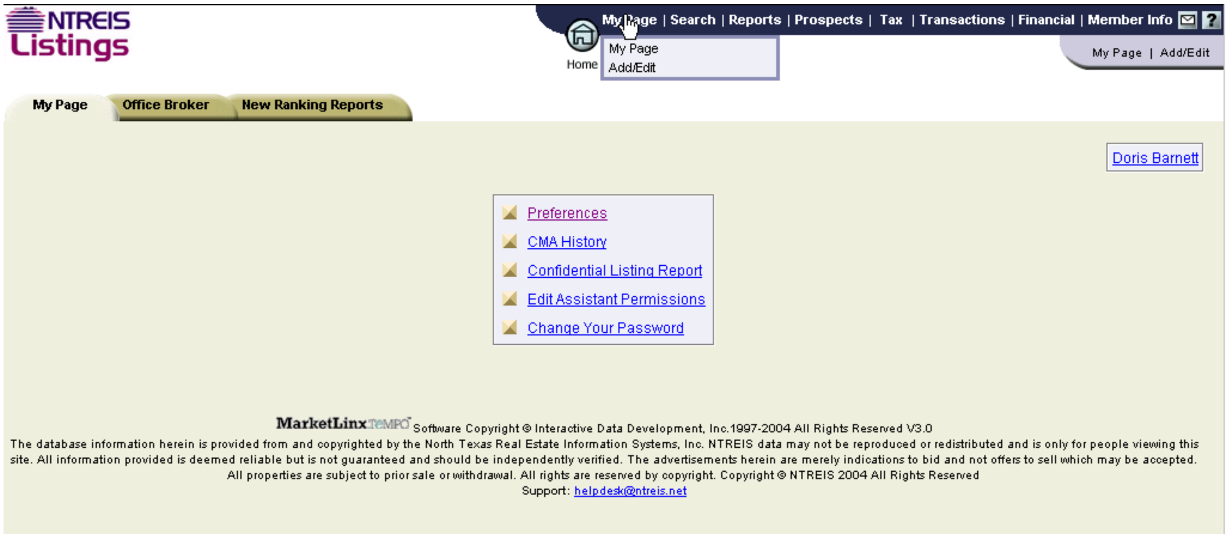
4. When the search results appear on the screen it's time to create a custom report and here is where you "find" the advocates. See page 7 for all of the steps in creating a Custom Report. Here are the fields that I chose for this exercise:

Residential Custom Report: *AdvocatesREPORT*

RES							
RES	Mls #	Cls Title Co	Title Phn	Title Co	MortCo	1st Loan Years	LA Full Name
1	9697324	Luna & Luna		HUD APPROVED			CLAUDIA SHUGART ABR, GRI
2	9717343	REPUBLIC TITLE	GARLAND	N AMER TITLE		8	Victor Richetti
3	9717735	Luna & Luna		HUD APPROVED		30	CLAUDIA SHUGART ABR, GRI
4	9718215	Republic Title	( ) -	REPUBLIC			Tiffany Sharkey
5	9007387	A			0	30	DUC NGUYEN
6	9017937	AMERICAN	(972) 248-1151	AMERICAN	0	30	Lori LaParche
7	9023031	REPUBLIC			0	30	MARY PRITCHARD
8	9125842	REPUBLIC TITLE	(972) 495-4959	REPUBLIC TITLE	0	0	CARY WINEGARDEI
9	9133967	SAFECO LAND TITLE	(972) 387-4535	SAFECO LAND TITLE	0	0	Ted Jorgensen
10	9148857	HEXTER FAIR		REPUBLIC	0	0	MICHAEL HAMBURC
11	9149372	SAFECO LAND TITLE	(972) 387-4535	SAFECO LAND TITLE	0	0	Ted Jorgensen
12	9059391	COMMONWEALTH TITLE	(972) 613-7878	COMMONWEALTH TITLE	AAA	30	James Kinder
13	9313580	CHICAGO		CHICAGO	ABC	20	Norman Melancon
14	9689600	STEWART TITLE	(972) 596-4011	STEWART TITLE	ABN AMRO MORTGAGE	30	DEBBIE PIZZITOLA
15	9268329	COMMONWEALTH			ABN MORTGAGE	30	VAL FENWICK
16	9556158	TEXAS TITLE	(972) 758-1101	TEXAS TITLE	ACCREDITED LENDERS	30	Roger Hawk

5. Remember that after you have created a CUSTOM REPORT you may sort by any of the headers. In this case you may sort by Title Company, Mortgage co, 1st Loan years or Listing Agent. You may want to sort and print by all of them. I included the 1st loan years to try to identify first and early time homebuyers. 15-year mortgages are more common in the last home to be purchased than the first home purchase.
6. When you sort the title companies and lenders you might notice which ones are doing the most closings in your area. These might be good people to get to know. All of them have a marketing person for your area. So the phone call could be as simple as "Hi could you tell me who your marketing person is?" Referrals are still a great way to meet the affiliates who will become important to your business, but it's nice to know how successful your preferred affiliates are.

Guaranteed Referrals



1. The one thing that you can do to guarantee referrals that you may not have thought of yet is to ask for them every time your client gets any information from you.
2. Click my page, Preferences, E-Mail preferences,

3. Now enter information that asks for the referral. Perhaps: "Who else do you know that is moving? My business is more successful due to my current and past clients and friends, thanks for your help."

Notes: