

Build a Database

That Will Build a Business



By Pat Zaby, CCIM, CRS

***The primary purpose of a database
is to facilitate communication.***



InTouch Systems

Automated Digital Marketing

Build a Database in 7 Days That Lasts a Lifetime

Regardless of whether an agent is new to real estate or struggling to get to the next level of productivity, experience has proven that having a database of contacts that know and trust you can be the source of your growth.

The concept is simple. The majority of buyers and sellers decide which agent to use based on a relationship: friend, relative, past customer or referred by a past customer.¹ It is necessary that they remember you're in real estate when they need to use you which currently averages every ten years.

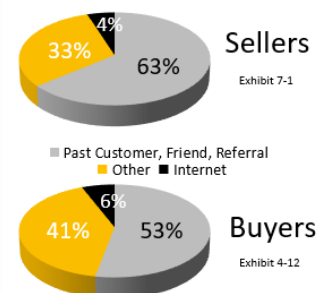
Arthur Middleton Hughes states in the Customer Loyalty Solution that *"Database marketing is effective in building customer loyalty and repeat sales only if the customer benefits from it..."*

No one wants to be in a marketer's database to be constantly barraged with requests to buy or sell something. The customer has to believe that being in their database directly benefits them by the information they receive.

"I don't care how much you know until I know how much you care." It is critical that you express a genuine concern to have their best interests at heart and is easily done by focusing your communications on things that benefit them.

There are certainly many different ways to be successful in real estate but if you look at the highest earning agents in the United States, you'll find that the majority of their income comes from repeat and referral business.

Relationships Drive Business



If you want one year of prosperity, grow grain.



If you want ten years of prosperity, grow trees.



If you one hundred years of prosperity, grow people

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Take a moment to answer the following questions and it will give you an indication of how you're doing with your database.

Are You A Secret Agent?

- | | | | |
|-----|--|------------------------------|-----------------------------|
| #1 | I have a database with contact info of all my past customers, friends, relatives and acquaintances | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| #2 | I have categories applied to each of my contacts | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| #3 | My calendar and contacts synchronize with my phone | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| #4 | I can access my database from any computer | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| #5 | I call my best clients a minimum of twice a year | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| #6 | I send something to my contacts a minimum of once a month | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| #7 | I send birthday & anniversary greetings to my contacts | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| #8 | I have a way to integrate social media with my database | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| #9 | I backup my database a minimum of once a week | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| #10 | I have a system to make sure all of the things listed above get done | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
-

Scoring -

8-10 Yes – You're doing a good job but there's always room for improvement

5-7 Yes – You're definitely leaving business on the table

0 – 4 Yes – You don't have the hang of contact management yet.

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Who Goes on the List?

Compiling a list begins with the question: Who do you know? It isn't about assembling the biggest list you can. It's about building a comprehensive list of the people you actually know who might do business with you or refer business to you.

People buy from agents they know, like and trust which explains why the majority of buyers and sellers select a real estate agent that they have a relationship. Our objective is to develop a relationship with individuals who will use our services and/or refer business to us. The process begins with identifying the people and then, consistently staying in touch with them in an interesting and relevant way.

You'll need a place to collect and maintain all of this information like Outlook, Gmail or a contact manager. It's important that the source will synchronize with your Smartphone so you'll have access to the information when you're away from your computer. As you add people to your list, place them in appropriate categories.

1. Compile a list of every buyer and seller you've had transactions with since you've been licensed.
2. Address books from each email program you have
3. Add your holiday greeting list of friends and relatives
4. Export the people registered from your MLS new listings announcements.
5. Add people you know from your church or place of worship.
6. Add friends from your high school and college.
7. If you have adult children, add the names of their close friends.
8. Add the names of the parents of your minor children's close friends.
9. Add names of acquaintances of your spouse from work, personal friends, classmates, etc.
10. Add names of people you know in civic organizations you participate.
11. Add names of people you know from your social activities.
12. Add friends from Facebook to your list.
13. Look at friends of your Facebook friends for people you know in common.
14. If you still have a Rolodex, go through it and reconcile it to your contact list.
15. Add any names you might have in spreadsheets that you used for mailings.
16. Add the names of the cards you have with a rubber band around them.
17. Look at directories of any organizations you belong.
18. Professionals that you do business with like doctors, dentists, accountant, etc.
19. Real estate affiliates you do business with like title, mortgage, insurance, etc.
20. Merchants that you do business with personally like cleaners, grocer, restaurants, etc.
21. Contractors that you do business with like painters, HVAC, and plumbers.
22. Former bosses and co-workers.
23. News media who could identify you as an authority on local real estate issues.
24. Out-of-town agents who could refer business to you.
25. Identify "Movers & Shakers" who know what's going with their friends and acquaintances.

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Marketing is the ongoing process of helping your contacts understand and appreciate what you do and why you do it better than anyone else. InTouch creates hundreds of impressions a year reinforcing your position to make them better homeowners.

A mailing list should include your current, past and potential customers; people who could do business with you or refer business to you.

Only add people to your database who might either do business with you or refer business to you.

What to do to grow your database

1. Add people each day as you meet them.
2. Add people that you receive email from.
3. Registrations at open houses (ask for email address).
4. Offering free reports from website or blog.
5. Subscribe to newsletter button from website or blog.
6. Have a subscribe button on your email signature
7. Have a subscribe button on your Facebook page
8. Have a subscribe button on your Twitter page
9. Friends of friends
10. Consciously be aware you need to add 5 names per day

**IF YOUR DATABASE
ISN'T GROWING
IT'S SHRINKING**

[How to Build an Outlook Contact List from a Spreadsheet](#)

Decide what to maintain it with

Compile your list

Categorize list

Reason for ongoing contact

Initial contact – strategy

Update contacts regularly

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Contact Management Solutions

		Minimum contract	Drip plans	Birthday Holidays	Social Networks	New content	Automatic
Outlook	No monthly		✗	✓			
Gmail/Yahoo	FREE		✗				
InTouch	\$39 p/m	None	✓	✓/✓		+++++	✓
Top Producer	\$39.95 p/m	12 months	✓	✓/✗		✗	✗
MoreSolds	\$14 p/m	none	✓	✓/✗	✗	*	✗
Ixact	\$34.95 p/m	none	✓	✓/✗	✗	*	✗
Realty Juggler	\$99 p/y	none	✓	✓/✗	✗	✗	✗
Wise Agent	\$24.95 p/m		✓	✓/✗	✓	*	✗
My Red Tools	\$39.95 p/m		✓	✓/✗		✗	✗

*MoreSolds, IXACT - one monthly newsletter

Categories

Categories describe your relationship to the contact. They will allow a user to sort contacts in order to target market more effectively.

- Friends
- Relatives
- Neighbors
- Past customers
- For Sale by Owners
- Expired Listings
- Distressed owners
- Investors
- Geographic Farm
- Newsletter
- Out of Town Agents
- Best Agents In Town
- Allied Professionals
- Service Providers
- Merchants
- Children's Friends (Parents)
- PTA
- Church members
- Civic organizations
- Social circles
- Closings 20XX

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Re-establish with Past Clients

- **Identify yourself completely** – Past clients need to recognize you in context to their previous home transactions. *“Hi, this is Susan Anthony with Stars and Stripes Realty. It’s been a while since we talked; how are you?”*
- **Express regret** – You wouldn’t be using this technique if you’d stayed in touch and you need to accept responsibility. *“I like to stay in touch with past clients because I am committed to helping you be a better homeowner not only when you buy or sell but all the years in between.”*
- **Offer Assistance** – *“Marketing homes has a unique by-product...developing a great list of reputable and reasonable service providers. Any time you need a recommendation, I want to be your personal Angie’s list.”*
- **Make a promise** – *“If it’s okay with you, I’m going to stay in touch with you on a more regular basis. Regularly, I’ll share homeowner information and advice with you by email and occasionally, I’ll check in with you by phone. In between, if there’s anything you need, please give me a call.”*
- **Confirm their email addresses** – *“Let me confirm that I have your correct email address. ...Is this correct? I noticed I don’t have (spouse’s name)’s email address; what is that?”*
- **Say thank you** – *“Thank you very much for considering me as your real estate professional. I do appreciate the opportunity to help you and your friends.”*

After the call –

- Make a note in their contact record describing what you talked about.
- If appropriate, schedule a date and time to make a follow-up call
- Confirm that you have them in your contact system and mailing campaign

You may be overlooking an obvious source of names you can add to your database. Go to your email program’s InBox and look for messages from people who are not in your database but should be. Right-click on the email address and add to your contacts. It will automatically open a contact record and populate the name and email address. If they have a signature on the message, you may be able to add more information like address and phone numbers.

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Scripts for Outgoing Phone Campaign

Area Activity – “...I noticed there has been some sales activity in the area and wondered if you might be interested in knowing what those homes sold for? (look them up while you’re talking and mention a few) Would you like me to email this list to you? Let me confirm that I have your current email address.”

Service Provider – “Almost every time we sell a home, there are things that need to be done to either improve the marketability or required by inspections. Over the years, we developed an impressive list of service providers that do great work at reasonable prices. Anytime you need a recommendation for a service provider, please give me a call. I’ll be your personal ‘Angie’s list.’ In fact, let me confirm I have your current email address and I’ll send you a brief list of some of my recommendations.”

Household Inventory – “Recently, I heard about a person who filed an insurance claim who wasn’t as prepared as they could have been. The house was covered but where the issue came up was with the personal belongings. The adjustor originally asked for receipts which the homeowner didn’t have. Then, he wanted an inventory of the personal belongings which unfortunately, the homeowner didn’t have either. If you don’t have an inventory or it has been a while since you updated it, I can send you one that you can complete and document with pictures. Let me confirm that I have your current email address.”

Refinance – “When was the last time you refinanced your home? Interest rates are low and it might make sense for you to consider it now. I have a refinance analysis calculator that will tell you how much you’ll save and how long it will take you to recapture the cost of refinancing. I can either help you over the phone or I can send you a link so you can do it yourself. Let me confirm that I have your current email address.”

Mortgage Accelerator – “Have you ever thought about pre-paying your mortgage? If you pay as little as \$100 to \$200 extra each month, it will save interest, build equity in your home and shorten the term of the mortgage. I have an online app that will let you make some projections and if you’re interested, I’ll send you a link so you can check it out. Let me confirm that I have your current email address.”

FHA MIP Release – “Do you still have a FHA mortgage on your home? I wanted to tell you about something that could save you some significant money. The Mortgage Insurance Premium on your loan is probably 1.25% and won’t be released until the unpaid balance is 78% of the original purchase price. The minimum term for it to be effective is five years. By making additional principal contributions, you could eliminate the MIP which will save a lot of money and also save interest, build equity and shorten the term of your mortgage. I have an online app that will let you make some projections and if you’re interested, I’ll send you a link so you can check it out. Let me confirm that I have your current email address.”

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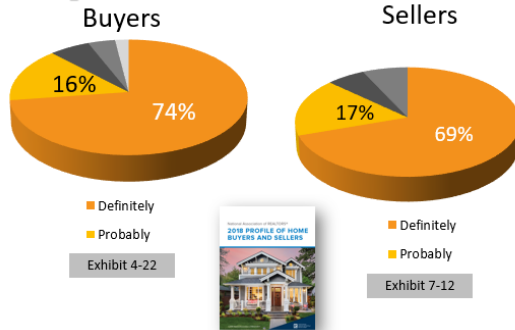
Stay In Touch

Most agents understand the need to stay in touch with their contacts in order to maintain top of mind awareness. According to the 2012 Profile of Home Buyers and Sellers, 89% of buyers say that they would use the agent again and refer business to them.

84% of sellers were satisfied enough in the recent transaction to make the same claim.

However, the shocking reality is that only 11-15% of the buyers and sellers actually do business with the same agent again. Homeowners are staying in their homes longer than in the past and one can only assume that they have forgotten about their previous agent or they have established a new bond with a different agent.

Repeat & Referral Sales



The responsibility of staying in touch is with the real estate professional. It isn't something that can be left to chance but needs to be a system that guarantees regular, consistent communication. The challenge is making each contact something that is interesting, relevant and anticipated. It must be centered on the needs of the consumer, not the agent.

If you were a CPA specializing in homeowner tax law, you couldn't write about taxes every week without boring your contacts to death. You would want to occasionally show your expertise but offer a blend of topics that would appeal to all homeowners. The acronym INTOUCH can serve as a formula for the content of the messages that can be sent over time.

I mprovements	• Value & resale
N ews	• Tax, insurance, financing
T ips	• Save time, money; Build value
O ne-on-One	• Conversations, meetings
U pkeep	• Maintenance & reminders
C ontractors	• Recommendations
H olidays	• Greetings, birthdays, anniversaries

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Conclusion

The objective of building a database for repeat and referral business is to provide you with the necessary buyers and sellers to meet your financial goals. By identifying a group of contacts and maintaining a high-level of top-of-mind-awareness with them, a reasonable estimate of revenue can be predicted.

Your Income = # of contacts TOMA



Your income is directly related to the number of people you know in your database and how much confidence they have in your abilities as a real estate professional. The strategy of building a database that will support your real estate career is a commitment. It will require consistent communications that benefit the recipients while branding you as their real estate professional.

The goals include not only helping them buy and sell their homes in the future but receiving unsolicited recommendations to their friends. You want to be considered their trusted real estate professional for life.

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Contact List Builder – complete the list with names only before adding other contact info

Closet friends

_____	_____
_____	_____

Neighbors (current home)

_____	_____
_____	_____

Neighbors (previous home)

_____	_____
_____	_____

Church members

_____	_____
_____	_____

Clergy

Social activities (golf, tennis, etc.)

_____	_____
_____	_____

High school friends

_____	_____
_____	_____

Teachers from school

_____	_____
_____	_____

College friends

_____	_____
_____	_____

Work Associates

_____	_____
_____	_____



Work Associates (previous job)

Relatives

Doctors (physician, specialists, dentists, etc.)

-

Veterinarian

Accountant

Attorney

Property Insurance

-

Life Insurance

Bank employees

Stock broker

Car salespeople

-

Barber/Hairdresser

-

Dry cleaners/Laundry

Mailman, FedEx, UPS

-

Fraternal Organizations

-

Civic Organizations

-



Facebook friends not recorded yet

<hr/>	<hr/>
<hr/>	<hr/>
<hr/>	<hr/>

Parents of children's friends (school)

<hr/>	<hr/>
<hr/>	<hr/>
<hr/>	<hr/>

Parents of children's friends (sports)

<hr/>	<hr/>
<hr/>	<hr/>
<hr/>	<hr/>
<hr/>	<hr/>

Children's teachers

<hr/>	<hr/>
<hr/>	<hr/>

Children's doctors

<hr/>	<hr/>
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Children's coaches

<hr/>	<hr/>
-------	-------

If your children are grown, their friends

<hr/>	<hr/>
<hr/>	<hr/>
<hr/>	<hr/>

If you are married, have your spouse complete pages 1-2-3 without seeing the names that you've put on your pages. Compare them and eliminate the duplicates.



Mortgage officers	-	<hr/> <hr/>
Title officers	-	<hr/> <hr/>
Inspectors	-	<hr/> <hr/>
Home warranty reps	-	<hr/> <hr/>
Painters		<hr/> <hr/>
Real estate agents outside your market area		<hr/> <hr/> <hr/> <hr/>
Builders		<hr/> <hr/>
Investors		<hr/> <hr/>
Other	-	<hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/>

- Every person you've sold a house to or for
- Holiday card list
- Church directories
- HOA directory (the area you live in)
- Children's PTA rosters
- Church directories
- Members in your social circles
- Members in your civic clubs
- Other organizations you belong that has a directory
- Orphaned contact lists from retired agents
- Current prospect list
- Past open house registers
- Email address books (for each email account)
- Email address book for spouse
- Email Inbox/Sent (capture email address)
- Excel spreadsheets with names & contact info
- Cell phone address book
- Cell phone address book for spouse
- Business cards
- Rolodex(es)
- Search friends of your FB friends for people you know
- Spouse's friends
- Spouse's email address book(s)
- Email Inbox/Sent
- Spouse's cell phone address book
- Spouse's classmates from school/college
- Spouse's associates from work
- Spouse's associates from former employment
- Spouse's social circles
- Spouse's civic clubs
- The parents of your children's friends
- If your children are grown, their friends
- Friends and associates from former employment
- Professionals you do business with
- Merchants you do business with
- Real estate affiliates you do business with