


# Drop-dead EASY Database


## *the what, why & how!*

Wednesday, January 13, 2021

Eastern	Central	Mountain	Pacific
12 Noon	11 AM	10 AM	9 AM

Join Pat Zaby,  
nationally known speaker  
and CRS instructor





FREE WEBINAR

2

What's the best exercise routine?



What's the best diet program?



What's the best way to budget?



What's the best database?

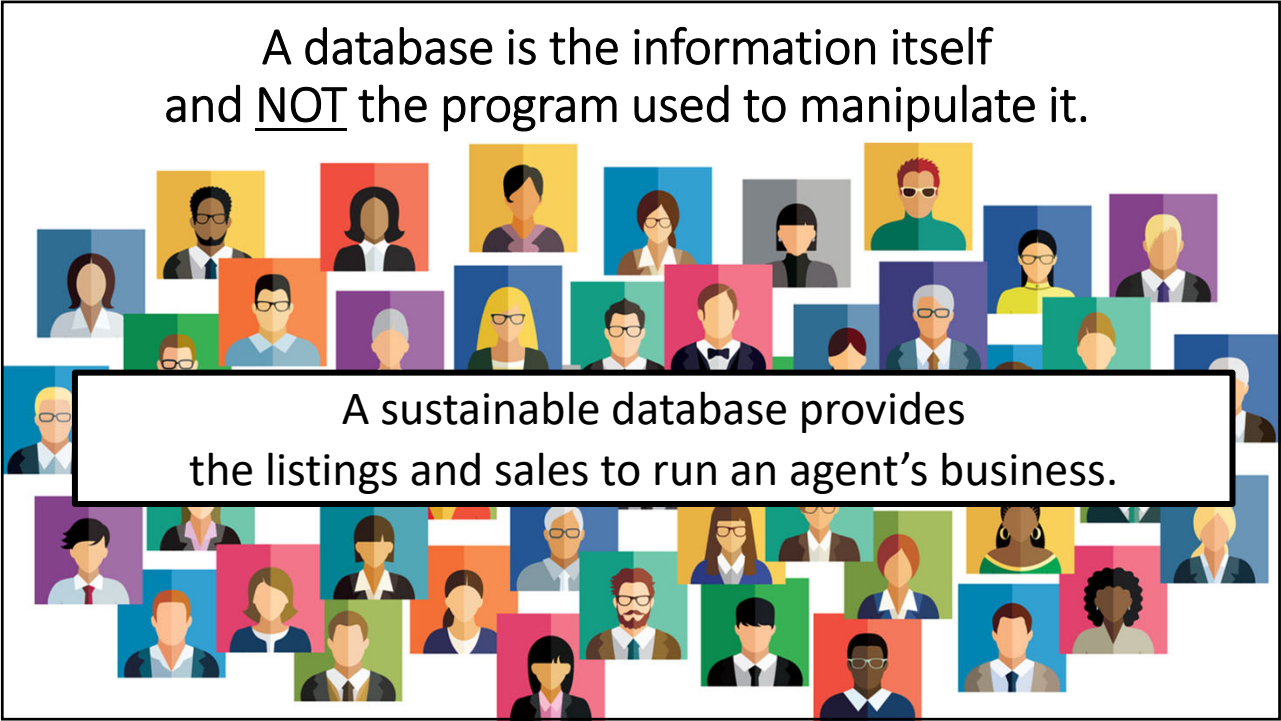


...the one you'll use!

3

A database is the information itself  
and NOT the program used to manipulate it.

A sustainable database provides  
the listings and sales to run an agent's business.



4



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## Common Agent Beliefs

- *“Most of my business comes from referrals from past customers and people I know.”*
- *“I have a database of past customers and people I know with contact info and notes.”*
- *“I stay in touch with the people in my database on a regular basis.”*
- *“My friends are different. I only have to tell them once that I’m in real estate. They’ll remember if they need my services.”*

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# Your Income = # of contacts



TOMA

Frqwdflw

Social Media

Sphere of Influence

Database

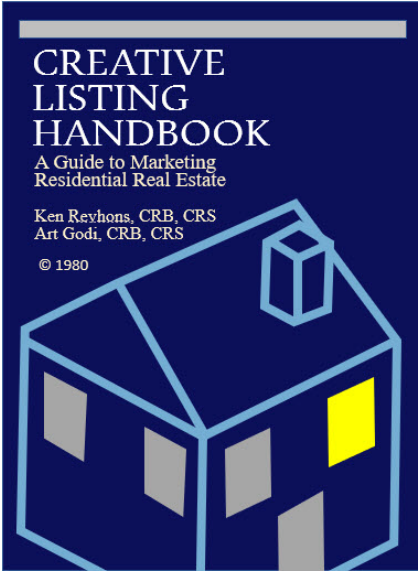
Address Book

Rolodex

Holiday List

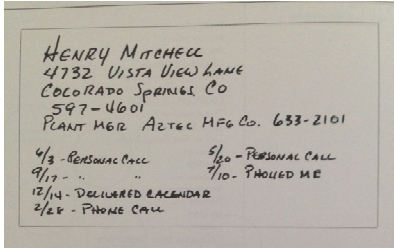
Magic List

8



**MAGIC LIST**

1. Write a list of everyone you know
2. On 3" x 5" cards, write each person's name, address and phone number
3. File the cards alphabetically
4. Type a duplicate list in case the file is lost
5. Set a specific time each week to service the magic list four times a year either in person, by phone or through the mail
6. Mark the date of each contact on the card.



9

A database reaches critical mass when the repeat & referral business generated adequately supports the agent's goals & lifestyle.



Critical mass is the point when a business becomes sustainable and profitable.

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# #1 Reason for a Database/CRM **To make salespeople more productive**

**A database is a strategy, not a tactic.**

**Increase your Productivity...Lower your expenses.**

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## Reasons for a Database Overhaul

- No single place to store data
- You're losing information on customers/transactions
- Costs to acquire new customers are too expensive
- Lead conversion rates are deficient
- Repeat & Referral business is lacking
- Risk reduction protocol.



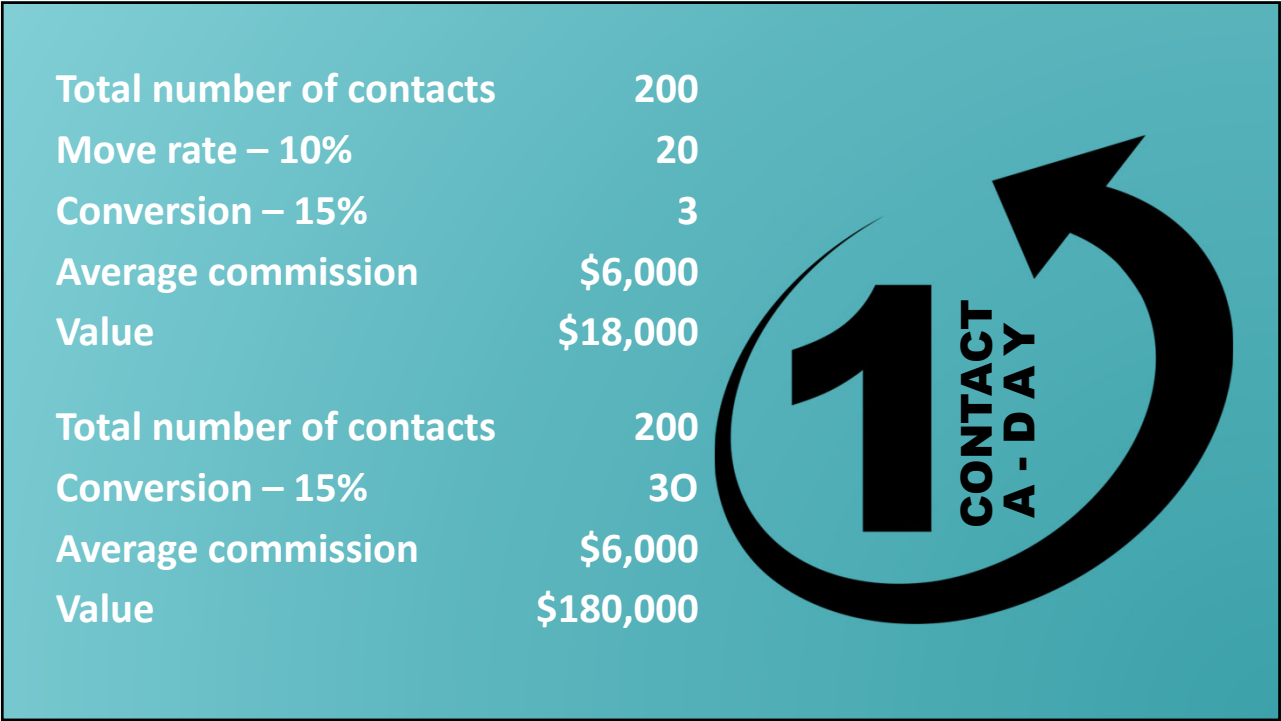
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People  
You've Met

- *Less expensive to capture*
- *Less competition*



People You  
Haven't Met

- *More expensive to capture*
- *More competition*

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It costs

**5-7x**

MORE

<p><b>5-20%</b></p> <p>Probably of Selling a New Prospect</p>	<p>Source: Marketing Metrix</p>	<p><b>60-70%</b></p> <p>Probably of Selling an Existing Client</p>
---	---	--

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# Price/Trust Relationship

## Buy Prospects

*(lead generation & paid referrals)*

*More Expensive...Less Time*

## Develop Prospects

*Build trust or transfer trust by referral or reputation*

*More Time...Less Expensive*

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*89% of Sellers & 91% of Buyers  
say they would use their agent again or recommend them to others.*

Source – 2020 Profile of Home Buyers and Sellers - Exhibit 7-12

20

The typical REALTOR® earned **15% of their business from repeat clients and customers**, and **20% through referrals** from past clients and customers.

Source – NAR 2020 Member Profile

**2/3**  
**FALLOUT**  
Why does his happen?

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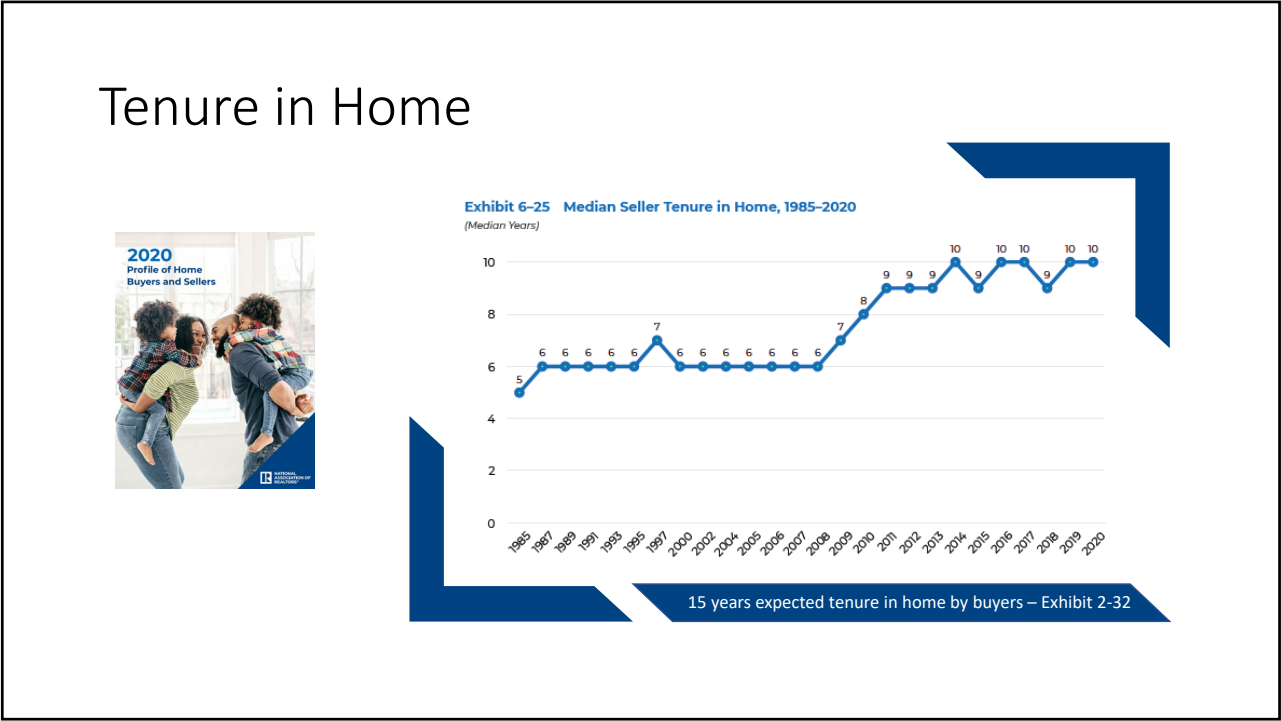


2/3 of sellers & buyers have recommended their agent **once** since selling and buying their home in the past year.

1/3 of sellers & buyers have recommended their agent **three or more times**.

Source – 2020 Profile of Home Buyers and Sellers  
Exhibit 7-13 & 4-23

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Median Income REALTOR®

12

# of years in real estate

12

X

Average deals per year

144

=

Total Past Customers

.88

X

.88 (say they'll use you again)

127

=

Potential Repeat & Referrals

10

÷

10 (average turnover in years)

13

=

Annual Repeat & Referrals

.65

X

.65 (Fallout due to no TOMA)


8.45

=

Annual Lost Sales

At \$6,000 avg. commission, it's over \$50,000

Open the calculator on your phone



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## Who is in your database?

- Everyone you've done business with
- People who will do business with you
- People who will refer business to you
- Everyone you meet – "Mets"

### Compile what you have

- Excel spreadsheets with contact info
- Address books from any email programs you are using
- Export contacts that have registered for new listings on your website
- Leads collected from Zillow, REALTOR®.com or other sources
- Export contacts from any CRM or contact manager
- People you know (local and national) – see attachment.

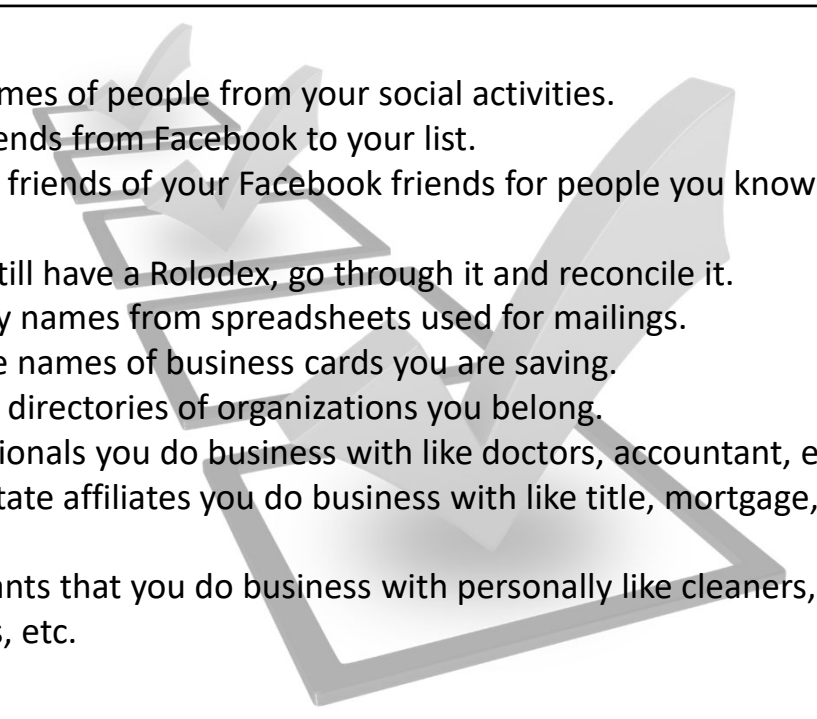
25

1. Compile a list of every past buyer and seller
2. Address books from each email program you have
3. Add holiday greeting lists 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, friends, classmates, etc.
10. Add names of people you know in civic organizations you participate.

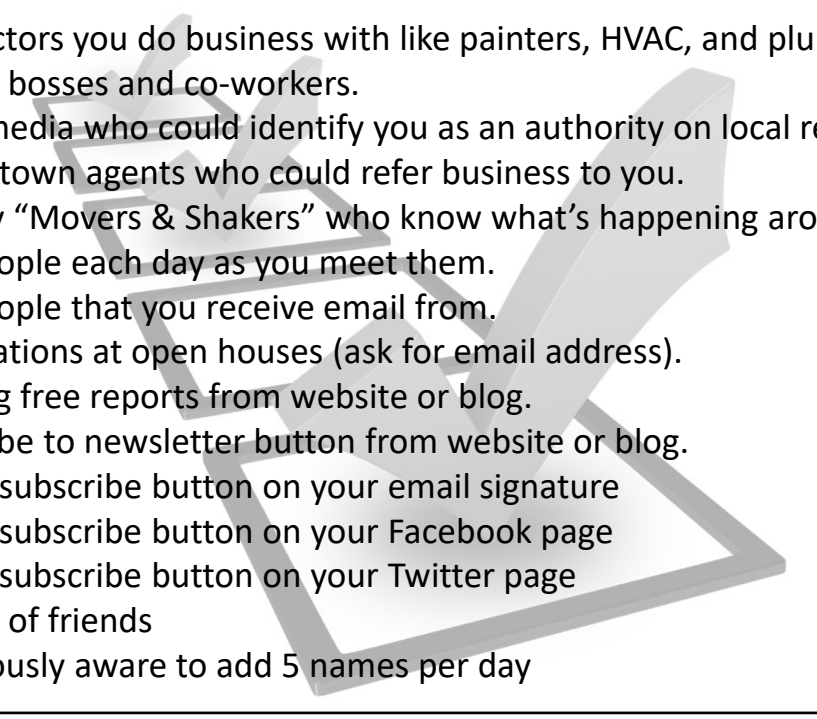
26



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- 
11. Add names of people 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.
  15. Add any names from spreadsheets used for mailings.
  16. Add the names of business cards you are saving.
  17. Look at directories of organizations you belong.
  18. Professionals you do business with like doctors, 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.

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- 
21. Contractors 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.
  24. Out-of-town agents who could refer business to you.
  25. Identify "Movers & Shakers" who know what's happening around them
  26. Add people each day as you meet them.
  27. Add people that you receive email from.
  28. Registrations at open houses (ask for email address).
  29. Offering free reports from website or blog.
  30. Subscribe to newsletter button from website or blog.
  31. Have a subscribe button on your email signature
  32. Have a subscribe button on your Facebook page
  33. Have a subscribe button on your Twitter page
  34. Friends of friends
  35. Consciously aware to add 5 names per day

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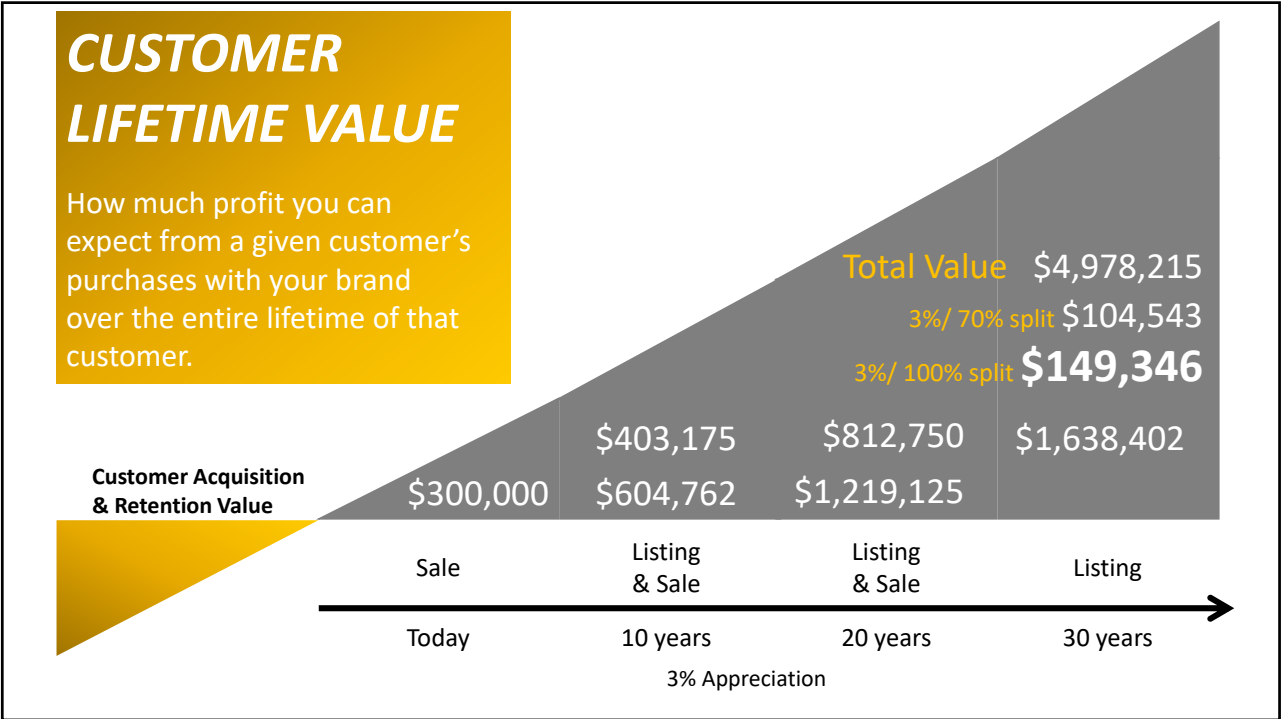
30

Would you take a part-time job for three days at \$250 hr? ...*to work on your database?*

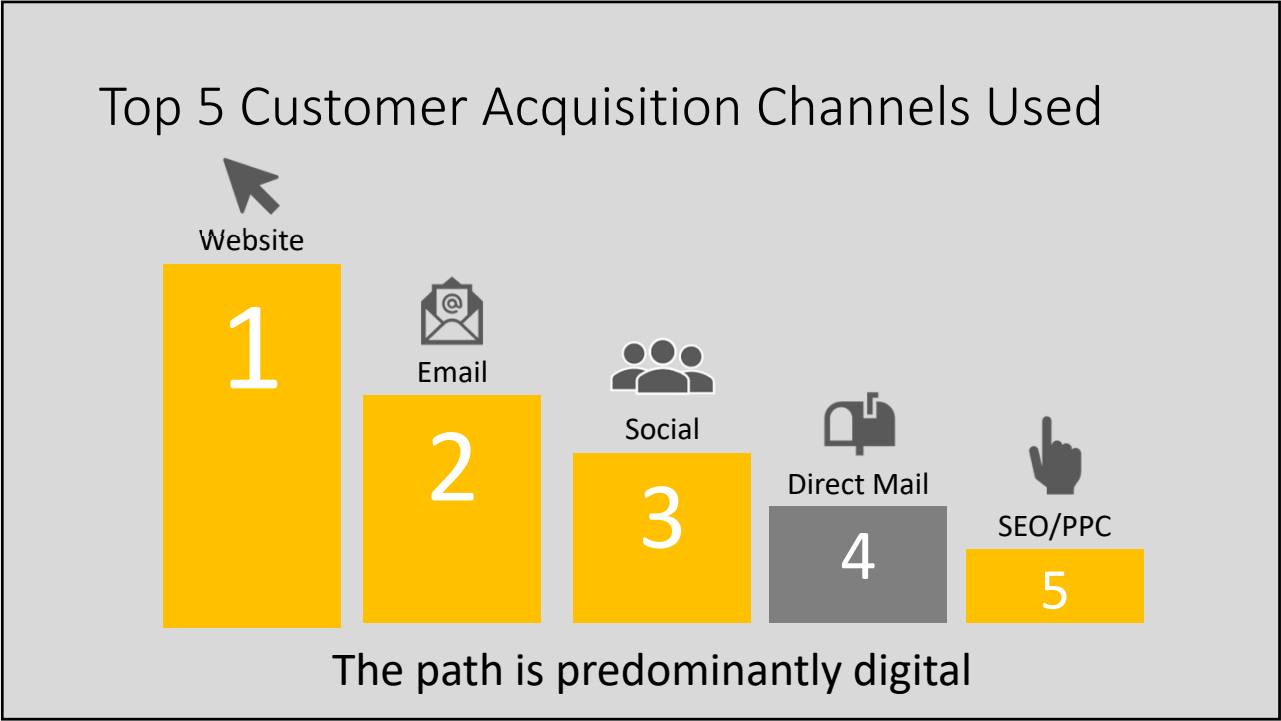
**\$250/hr. x 24 hours = \$6,000**

- 1. Christmas card list
- 2. Directories
- 3. Email address book(s)
- 4. Phone address book(s)
- 5. Mailing lists on spreadsheets (Excel)
- 6. Have Fiverr consolidate lists
- 7. Social media & relationship tabs
- 8. All past customers
- 9. Open house lists.

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People don't want to be in a database or on a mailing list...

... they do want to receive things that will help or entertain them.

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## Offer a homeowner newsletter & explain why and what it will do for them

**Why should an agent do this?**

- Commitment to mission
- Provides continual service
- Builds customers for life

**What would a contact receive?**

- Valuable info:
  - Maintenance
  - Minimizing Expenses
  - Manage debt & risk
  - Add to enjoyment

**Strategies**

- Website capture form
- Market multiplier capture form
- Facebook capture form
- Requests from lead generation sites

**Better Homeowners**

**SUBSCRIBE to Better Homeowners**

Provides valuable info

- Maintenance
- Minimizing Expenses
- Manage debt & risk
- Increase enjoyment

Name

Email Address


**Subscribe**

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Consciously  
collect  
birthdays  
and  
anniversaries  
of contacts



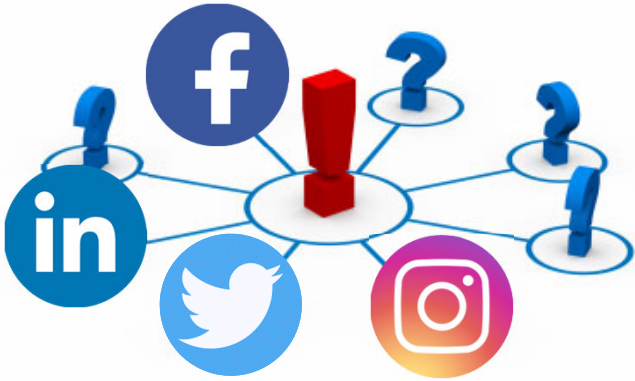
1. Go the Facebook  
> Friends >  
Birthdays

2. Collect info from  
every closing

3. Pay attention and  
record it in your  
database

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Reconcile  
your Contacts  
with Social  
Media



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# Social Media is a Database

## Benefits

- Collection of information about people who know you
- Either party can post things to stay up-to-date with each other
- Direct message each other
- most won't let you export the contacts but it doesn't mean you can reconcile them

## Strategies

- Like/Comment on their posts
- Reply to their comments
- Ads
- Boost posts
- Facebook Live to showcase your expertise.

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# Services buyers and sellers want

- How much is my home worth?
- New listing alerts
- Service providers (recommended)
- Comparable sales data
  - To lower my property tax assessment
  - To make a fair offer on a purchase
- Real estate review

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# Enter to Win!

Contests can appeal to existing and new customers and should have a substantial give-away.

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## Showcase your expertise

- Blog
- Speaker
- Webinars
- Facebook Live
- Videos

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# Email Signature

Send

To

Cc

Subject

**Susan Anthony, Certified Residential Specialist**  
Stars & Stripes Realty | 5023 Sea Pines, Dallas, TX 75287  
972-407-1337 | Cell 214-850-7308  
[Susan@SusanAnthony.com](mailto:Susan@SusanAnthony.com) | [www.SusanAnthony.com](http://www.SusanAnthony.com)  
[Better Homeowners' Resource](#)

*Helping homeowners when they buy, sell and all the years in between.*

f

in

t

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Better Homeowners

Helping homeowners when they buy, sell and all the years in between.

HOME

BUYER'S GUIDE

SELLER'S GUIDE

INFO GUIDES

FINANCIAL APPS

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in

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Selling a home can be confusing

Selling a home can be confusing and having professional help to guide you through the process is valuable.

This free Seller's Guide has lots of information about the differences in price and value, pricing strategies, attracting buyers, maximizing marketability and many other things that every seller needs to know before they put their home on the market.

Fill out the form below to download your free guide, and best of all get in touch if you have any questions.

First Name

Last Name

Email Address

Phone Number

Download

Susan Anthony

Stars & Stripes Realty

972-407-1337

Contact Me

Visit Website

Subscribe to Newsletter

46

Let contacts  
schedule their own  
appointments

Susan Anthony

Home Valuation

In this meeting, we'll pull information from property tax records and the Multiple Listing Service in order to indicate the fair market value of your home.

You'll receive copies of this information. We can also address other concerns like market conditions, market time as well as other questions.

Select a Date & Time

December 2020

SUN

MON

TUE

WED

THU

FRI

SAT

1

2

3

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11

12

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31

Central Time - US & Canada (7:02am)

30 min

Web conferencing details provided upon confirmation.

POWERED BY

Calendly

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Agents are much more efficient when their database is more than just a storage bin for contacts.

---

The goal is to build better relationships to grow a business.

---

A major challenge for agents is staying organized and following-up with their customers and prospects.

A stack of colorful plastic storage bins in various colors (red, yellow, orange, blue, green, black) arranged in a pile, symbolizing organization and storage.

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### RULE OF 33

For every 12 people in your database that you contact 33 times a year, you'll have 2 transactions.

Contacts	Units	Value*
144	24	\$144,000
264	44	\$264,000
600	100	\$600,000
900	150	\$900,000
1,500	250	\$1,500,000


\*Average commission \$6,000

16.7% conversion



50

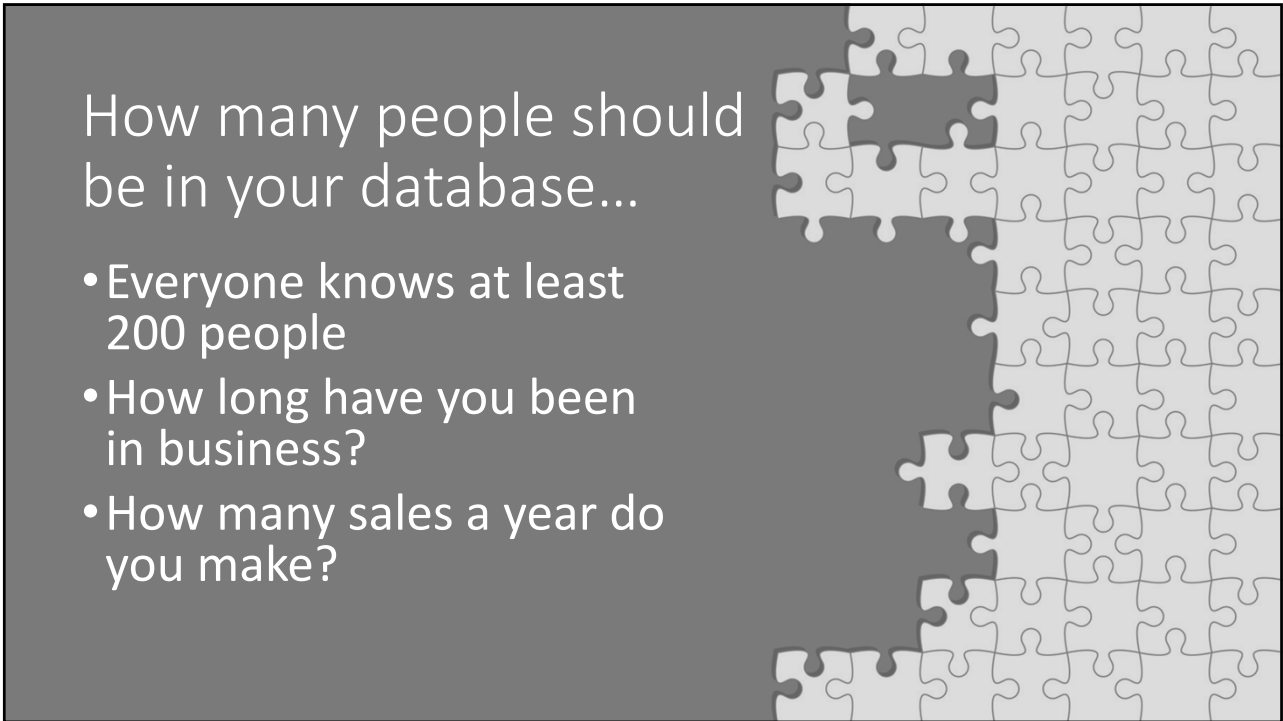
## Contact Upgrade Process



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## A Database is a work in progress...

- Daily
- Adding Names
- Updating Information


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Median Transactions  
**12 units**



Median Income  
**\$49,700**



Marketing Expenses  
**5-15% = \$2,485 - \$7,455**

**Median Gross Income**

< 20 hours a week	\$10,000
40 hours a week	\$78,800
> 60 hours a week	\$113,900

The **largest expense category** for most REALTORS® was **vehicle expenses** which was \$1,400.

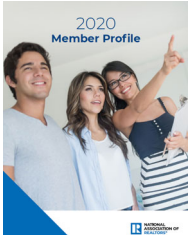
Source – NAR 2020 Member Profile Exhibits 2-8, 3-13, 3-16

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Maximize your income potential  
by spending the majority of your time at the 20% rate.

Median Gross Income	\$49,700
Average hourly work week	40
Net average hourly wage	\$24.85

2020  
Member Profile



Source – NAR 2020 Member Profile

Pareto Principle

80% 20%

EFFORTS

\$9,900  
20%  
\$6.19/hr

\$39,760  
80%  
\$99.40/hr

RESUME







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### Selecting a Database

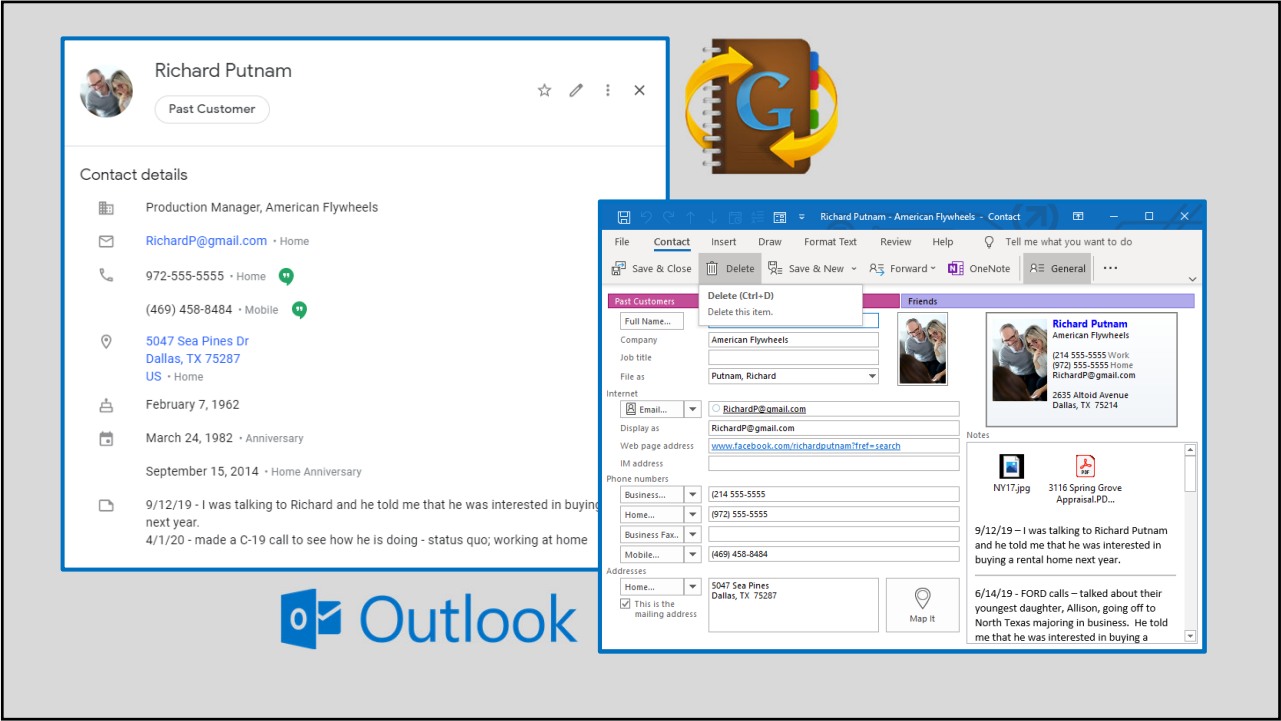
- Simple to use
- Works seamlessly with your email
- Syncs with your phone
- Online/Offline
- Collaborative learning
- Multiple users
- Auto-update.

?





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# Keep It Simple

- Less categories
- Less fields
- Less functions
- Focus on what matters.

*“Perfection is achieved not when there is nothing more to add, but when there is nothing left to take away.”*

Antoine de Saint-Exupery  
French philosopher

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### Examples of Categories

- Friends
- Past customers
- Top 50
- Top 150
- Buyers Not Ready Yet
- Sellers Not Ready Yet
- Investors
- Referral Source

- For Sale by Owners
- Expired Listings
- Out of Town Agent
- Best Agents In Town
- Allied Professionals
- Service Providers
- Merchants

Categories are used for targeted marketing

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### Do you need all these features?


ESSENTIALS

Address Book

Calendar

Marketing

Campaigns



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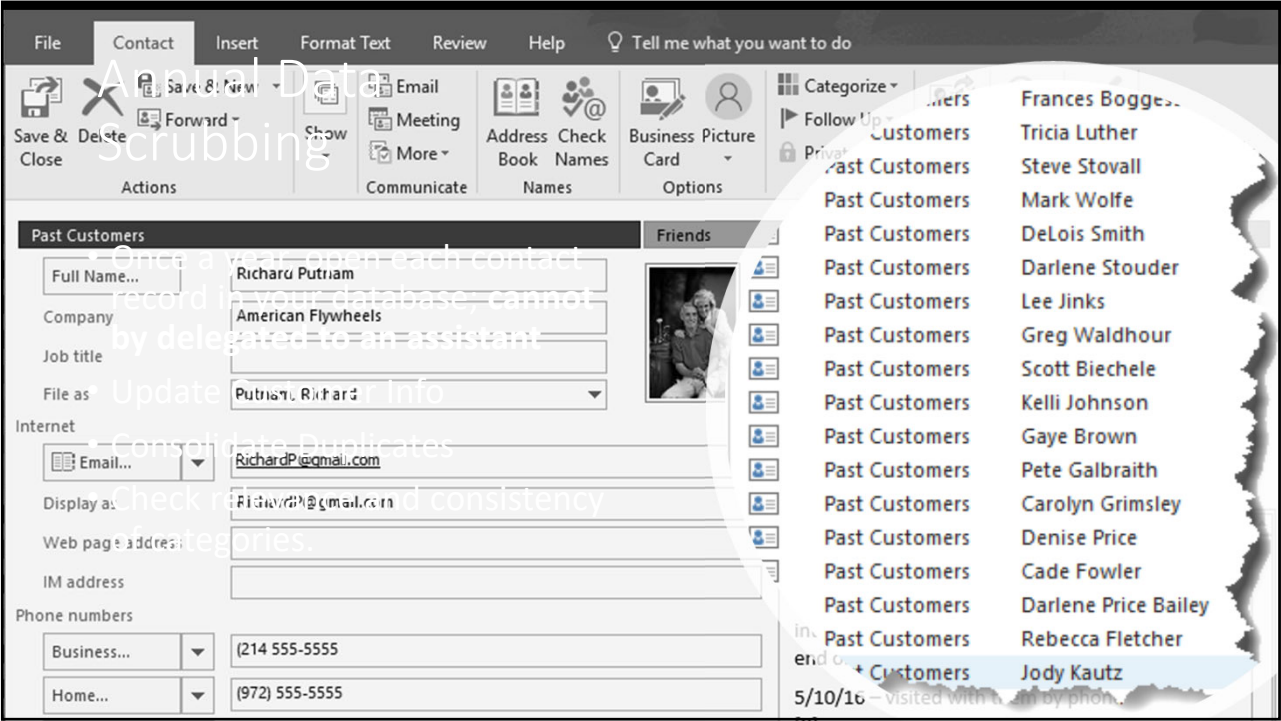
### Every Time You Talk to a Person

- Open their contact record
- Quickly scan the notes
- Verify email address & add others
- Try to complete or update info in the fields
- Make a dated note about what you talk about
- Schedule a follow-up.

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### When You're Not At Your Computer...

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**Your contacts are likely a significant source of your business but poor contact management results in lost sales.**

**5 ways to manage your contacts more effectively**

**1.**

Keep Contact Info in ONE Place

**2.**

Consistent data input & updates

**3.**

Use the system right for you

**4.**

Communicate with your contacts

**5.**

Automate Tasks

65

Customer Communication is the principal reason to have a database



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The average homeowner knows 10-12 agents

- If you don't stay in touch, someone else will
- People tend to do business with the one who appreciates their business.



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***They don't care how much you know  
until they know how much you care.***

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## Resource for Real Estate Information

- Buying & Selling
- Maintenance
- Minimize Expenses
- Financing
- Energy Efficiency
- Taxes
- Manage Debt
- Security
- Service Providers
- Remodeling
- Rental Homes
- Insurance



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# Contact Plan for Your Database

CONTACT US

100%

Top 50%

Top 25%

70

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*Automated Digital Marketing  
for Top-of-Mind Awareness*

## Digital Marketing Components & Frequency

**Automated Email**  
*Newsletters, Holidays  
Special Occasions*

**Automated Social Media**  
  
\*Easily posted

**Automated Landing Page**  
*Aggregates Content  
Additional Resources*

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## Automated eMail

## Newsletters



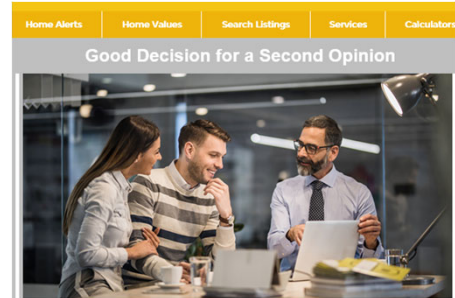
Homeowners still have considerable advantages from the amortization of the mortgage and the appreciation enjoyed by most homes even with taking the standard deduction instead of itemizing to take the interest and property tax deduction.

There is an adage, "Rent or buy, you pay for the house you occupy." You either pay for it yourself or for your landlord. The people who have job security, sufficient income, good credit and the funds for the down payment and closing costs can enjoy the many financial and emotional benefits of homeownership.

Looking at a \$350,000 home purchased with an FHA mortgage with 3.5% down payment at 3.25% interest for 30-years, the total payment would be \$2,420 a month. During the first year, the average monthly principal



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You've done your homework, contacted a mortgage company and believe you are pre-approved. That part of the process is finished and you can concentrate of finding a home and moving...or can you?

Pre-qualified and pre-approved are two different things but some people, including some in the business, use the terms interchangeably. Pre-qualified is an opinion of likelihood that a borrower will be approved based on preliminary information about their income and credit. Whereas, in a pre-approval, the borrower's credit report is updated and pulled, income and assets verified and involves pre-underwriting.

Even when you have a highly qualified loan officer, the real decision maker is the underwriter who can commit the lender. Generally speaking, a person who has been pre-approved receives a written letter



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## Automated eMail

# Newsletters

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Settings • Contacts • Marketing • Financial Apps

Article

Article Title

Publish Date

Tags

Summary (1/2 sentence)

Social Post Comments

Article Type

Blog

Select the Font, red  
Outline, 20px, 630px

**Create your own custom article**



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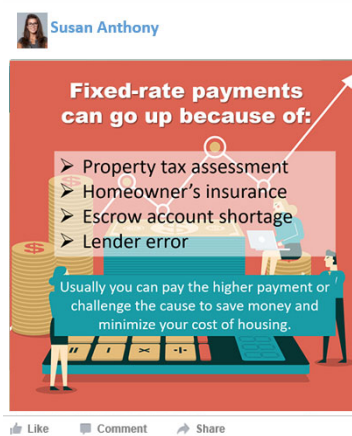
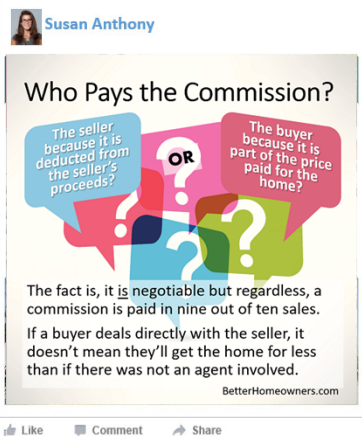
## Holidays & Special Occasions



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 **Social Media**

## Infographics



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 Social Media

# Short stories

**Susan Anthony, Realtor**  
Published by InTouch (?) · November 12 at 4:00 PM · 

With surefire ways to see a return on your investment, relatively low initial costs, and the potential for a lifetime of memories, buying a home now is a strategic and exciting thing to do.



BETTERHOMEOWNERS.COM  
**Millennials Do Understand It**  
A recent survey reported that 36 percent of millennials prefer investing in...



Opens in  
Landing Page



Millennials Do Understand It - 11/12/2019



A recent survey from [Bankrate](#) reported that 36 percent of millennials prefer investing in real estate over all other options, including the stock market, cash investments, and cryptocurrency. According to [Business Insider](#), the generation is also responsible for the largest share of new mortgage loans. Here's why millennials are betting on real estate, and you should too.

Unlike stocks, which can completely lose value, or cars which depreciate in value over time, real estate stays valuable no matter what. Because it's a tangible asset and completely in your hands, you have the power to improve its value over time through repairs and renovations. That's a huge benefit compared to the stock market, which is entirely out of your control and incredibly volatile.

In buying a home, you will never lose the full value of your investment and you'll enjoy a rare kind of investment flexibility. Buy earlier on in your life, and not only will the value of your home increase over time, but the risk of loss will decrease the longer you hold onto it. That means the window for building equity is wide open.

...million each year, which never stops until the house

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 Social Media

# Videos



**No extra charge**



**Reasons to Refinance Your Mortgage**



BetterHomeowners.com



*Selling Your Home Safely*  
**DIGITAL Marketing Plan**  
BetterHomeowners.com



What to Avoid Before Closing Your New Home

BetterHomeowners.com

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Social Media

Daily Post Reminder

In 30 seconds, it will be on your Facebook personal page.

Share on Facebook

Share to News Feed or Story

Pat Zaby

say something about this

Ctrl + V to paste pre-written social media comment

BETTERHOMEOWNERS.COM

Regular Principal Contributions

Making regular, additional principal contributions with each mortgage payment...

Tag Friends

Check in

Feeling/Activity

News Feed

Your Story

Click to post

Post to Facebook

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Social Media

Posting to Instagram

Instagram will post to your Facebook personal page at the same time

Instagram

Susan Anthony

Looking for an investment that will turn \$10,000 into \$80,000 in seven years? Sound... more

Add a comment...

1 hour ago

thisisrrc

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# Market Multiplier

## Better Homeowners

Helping homeowners when they buy, sell and all the years in between.

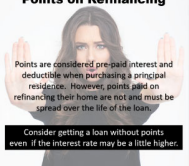
HOME BUYER'S GUIDE SELLER'S GUIDE INFO GUIDES FINANCIAL APPS



### One More Reason to Refinance

Taking cash out of the equity of your home could be a legitimate way to fund a temporary cash crisis because you need the money now or want to have it on-hand just in case.


4/29/2020



### Points on Refinancing

Points are considered pre-paid interest and deductible when purchasing a principal residence. However, points paid on refinancing their home are not and must be spread over the life of the loan.

Consider getting a loan without points even if the interest rate may be a little higher.




### Rentals are the IDEAL Investment

Income	Offset the carrying cost of the investment
Depreciation	Constitutes a non-cash deduction
Equity Build-up	Amortization of mortgage
Appreciation	Increases in value
Leverage	Increases yield if positive



Rentals are IDEAL Investments

4/28/2020



A parent can give up to \$15,000 each for their children per year without gift taxes.

...that can be used for down payments on homes.





### Stars & Stripes Realty

**Susan Anthony**  
CRS  
Stars & Stripes Realty  
(972) 407-1337


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Visit Website

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# Market Multiplier

*Better Homeowners*  
Helping homeowners when they buy, sell and all the years in between.


## Information Guides



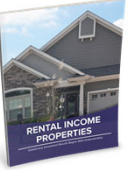
SELLERS GUIDE




BUYERS GUIDE




TAX GUIDE




RENTAL INCOME PROPERTIES



HOME INVENTORY



ADDITIONAL HOME ADVISORY



MOVING GUIDE

### FACTS OR MYTHS

**"It's impossible to get low down payment loans." - FACT:** FHA down payments are 3.5% and VA is 0%. In some areas, there may be some 2% down payment USDA loans available. FHMA and Freddie Mac have 2% down payment programs.

**"If I've had a bankruptcy or foreclosure, I can't qualify." - FACT:** Credit history following a bankruptcy or foreclosure is very important and there can be devastating circumstances. It only takes a few months with a reliable lending professional to find out if your individual situation will allow you to qualify for a new mortgage.

**"All lenders are the same." - FACT:** Reliable lending professionals will explain the entire process before collecting fees, quote fees up-front, have competitive products, do what is necessary to get the loan approved, and close at the locked rate and terms. Ask for recommendations from recent borrowers.


**"It takes perfect credit to get a loan." - FACT:** There is a relationship of better rates to better credit but many issues on a credit report can be explained or corrected. The way to know for sure is to speak to a reliable lender.

**"Getting pre-approved is expensive." - FACT:** Usually, the only expense to getting pre-approved is the cost of the credit report which could be around \$35. The advantage is that you will know that you qualify for a particular mortgage amount.

**"I should wait to qualify until I find a home." - FACT:** It can take time to qualify for a mortgage especially if there are issues that need to be corrected. The best interest rates are only available for the highest credit scores. It is to your advantage to start the qualifying process early in your home search.

*Buyers and Sellers need solid information to make good decisions. Call us with your questions or to get a recommendation of a reliable lender who can give you the next steps.*

Courtesy of Susan Anthony | Slars & Stripes Realty  
| Susan@SusanAnthony.com

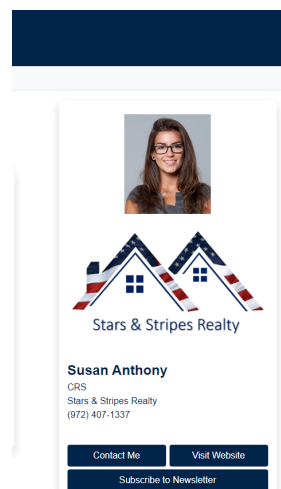
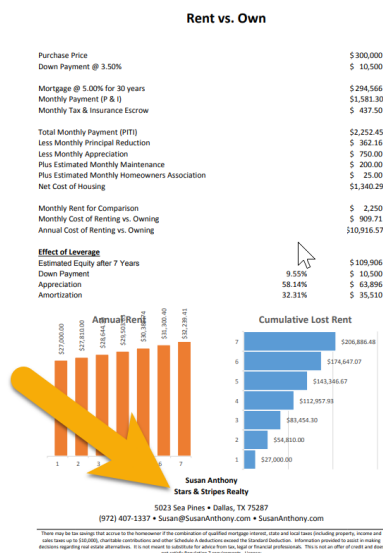


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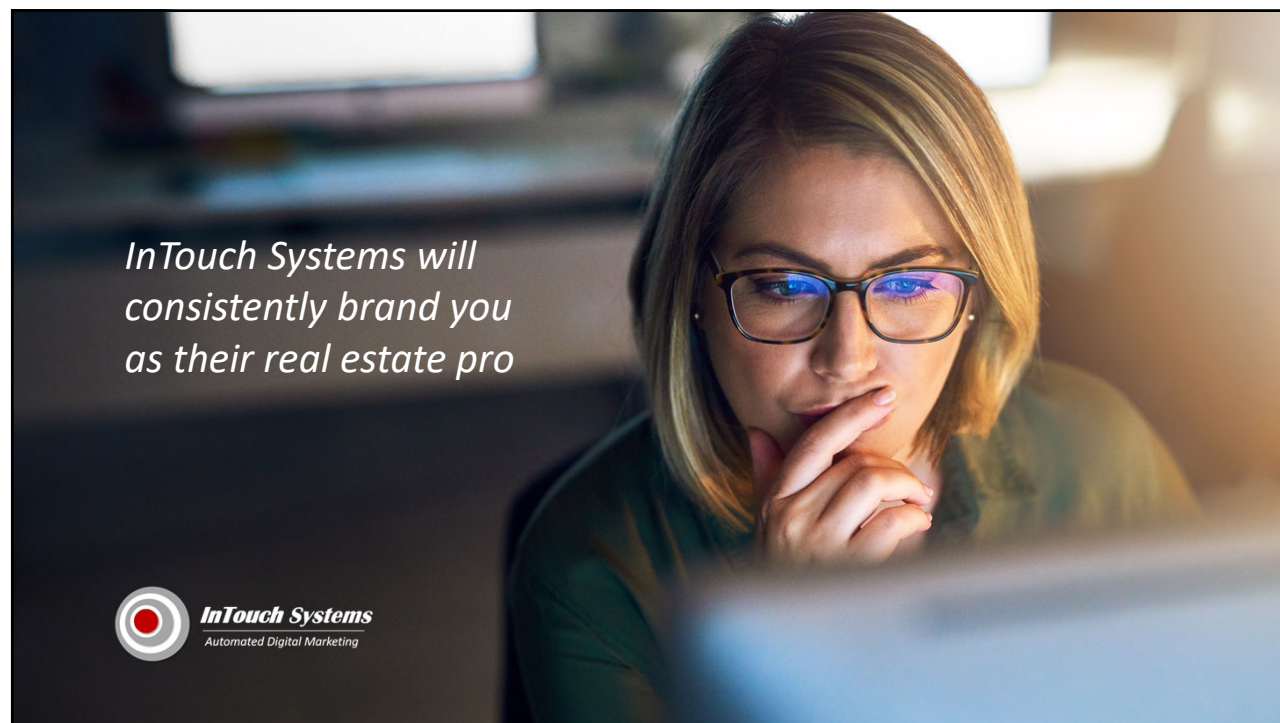
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## Market Multiplier

- 18 different apps frequently used in articles
- Consumers can input their own numbers
- Get their answers
- Prints with your contact info
- Can be embedded into your website.



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*InTouch Systems will  
consistently brand you  
as their real estate pro*



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resources or just don't  
want to do it...

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Setup is EASY!!!  
using the step-by-step wizard





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# 1-on-1 Setup

*We'll take control of your computer and do it for you*

In about

# 20

minutes

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# Setup is EASY!!!

## EASY IMPORT Auto-Update



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