**Database Build Out!!**

**Goal to do all steps at once as adding each contact!**

1. Enter the Contact
2. Categorize them
3. Set Up Automation
4. Call/Text them personally

**Collect Database**

1. Start with all Past Clients (Skyslope/Transaction Desk/Closing records/Email files)
2. Then all active and current clients/leads
3. Then collect your sphere (go through your phone contacts and Facebook)

**Make a set structure to add XX per day**

1. Example if you add 10 per day and have 300 people
2. In 30 days, your entire database will be entered and set up and in motion
3. Now we can work on the ongoing marketing plan to that clean and categorized database!!

**Database Management – Entering New Contact to your CRM**

1. Login to KV Core
2. Go to Smart CRM – Left Menu
3. To Add a New Contact – Click +Add Contact (Green button on right)
4. Add all contact info
5. Under Permission to Contact? Change all to YES
6. Add Address – If you have
7. Lead Type – Mark as necessary
8. Lead Status – Mark as necessary (example: Closed)
9. Lead Source – Manual Add
10. Lead Owner – Sherry Hornsby
11. The Options section leave blank
12. Then click Add Contact

**Inside the Client Profile that was Created**

1. Everything on the right-hand side is your marketing Automation
   1. Property Alerts – Buyer Saved Searches
   2. Active Campaigns – Ongoing text/email campaigns based on lead or client type
   3. Market Reports – For ALL (past clients/active clients/leads, etc)
   4. Core Present – CMA Builder for potential sellers/homeowners
   5. Listing Valuation – Potential Sellers and Past Clients/Homeowners
   6. Seller Report – For ACTIVE listings. Gives them a report of how many hits their home is getting online
2. Example Scenarios
   1. If a Buyer Lead: Put on property Search and Market Report and Smart Campaign
   2. If a Past Client: Put on Market Report and Smart Campaign
   3. If Active Listing: Put on Market Report and Seller Report

Major KV Core Tools for Servicing Business and Production

* What to do the moment you take a listing Active
* CMA Builder
* Presentation Materials
* Pitch Sheet – Pool of active buyers searching in their neighborhood and price point
* Lead generation tools
* Watch me: <https://youtu.be/GLmTZgzVaS4>