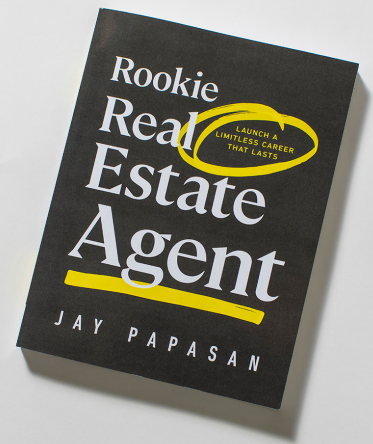


Segment and Tag Your Database



Although everyone in your database is stored in the same container, they do not all have the same relationship with you. It doesn't serve you to communicate with them all the same way or in the same cadence. That's why you need to correctly organize and categorize people within your database through **segmenting** and **tagging**, so you can offer them the right information at the right time and get into business with them.

Types of Segments in Your Database

There are different levels, or segments, of people who exist in your database. Here is a basic database make up of segments:

Segmenting Levels in a Database

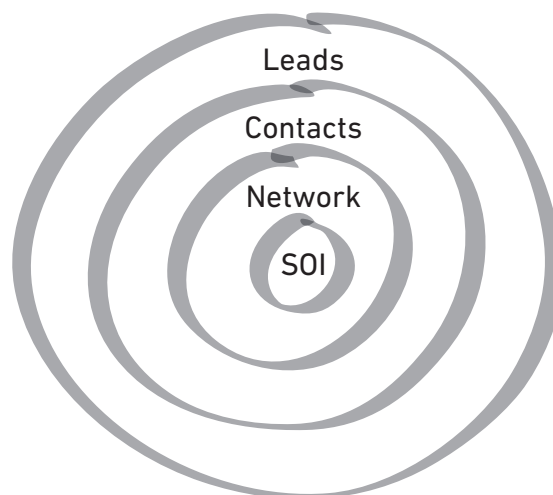


Figure 26

Rookie Real Estate Agent, p. 91

WARNING! You must comply with the TCPA and any other federal, state, or local laws for calls and texts. Under the TCPA, you cannot call or text a number on the National Do Not Call Registry (or any other Do Not Call list) and cannot use an automatic telephone dialing system or an artificial or prerecorded voice without proper consent. We recommend that you contact your attorney to ensure your compliance with the TCPA.

1. At the core of the model is your **SOI**, or sphere of influence. These are the people who won't think twice about doing business with you or referring you out. You would have a closer relationship with them and would speak to them more casually than someone you were first meeting.
2. One level out is your **network**—people who you know but aren't necessarily in your close sphere.
3. Then there are **contacts**, who know you and who've given permission to stay in touch about real estate.
4. On the outermost circle are **leads**, who you are working to get permission to have real estate conversations with. When reaching out to leads, you will need to give background about yourself and your business.

Within these levels are people who have different interests, wants, needs, and relationships to you. Use these differences to create specific, informed, and high-quality communication.

Tag Your Database for Personalized and Effective Communication

Tags are labels you add to people in your database that allow you to sort them into different buckets. Tags help you organize your messaging and activities. It's one thing to touch your database regularly, but providing valuable information to the right people at the right time will help your business go the extra mile. This is where tagging comes in.

Tags can range from people you have "met" or "haven't met," to "renters" or "homeowners," and even more specific things like "dog-lover" or "Chicago Cubs fan." By tagging your database appropriately, you can be deliberate and personal with your approaches, resulting in more steady and ready business.

Popular Database Tags for Rookies

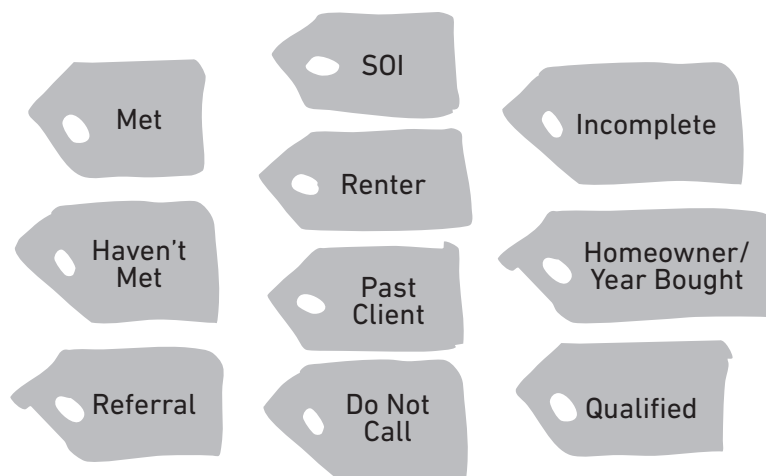


Figure 27

Rookie Real Estate Agent, p. 92

WARNING! You must comply with the TCPA and any other federal, state, or local laws for calls and texts. Under the TCPA, you cannot call or text a number on the National Do Not Call Registry (or any other Do Not Call list) and cannot use an automatic telephone dialing system or an artificial or prerecorded voice without proper consent. We recommend that you contact your attorney to ensure your compliance with the TCPA.

How Segments and Tags Work Together & Work for You

Let's say you want to alert your database to a first-time home buyer seminar you are hosting. Here are some steps you could take to create intentional and effective messaging:

1. Filter for your "Renter" tag within your SOI, network, and contact segments. Create an email focusing on the details of the seminar and what they will learn. Send out your invitation or create a campaign around the event in your CRM for this tag and segments.
2. Filter for your "Renter" tag within your leads segment. Create an email inviting them to the event, and include extra details about you and your business. Send out your invitation or create a campaign around the event in your CRM for this tag and segment.
3. Filter for your "Homeowner" tag within your SOI segment. Create an email asking if they know any young professionals or couples who might be interested in attending. Send to this specific tag and segment.

You just created awareness for your event with three different groups of people in a personalized way! Sorting people into buckets lets you send customized mass messaging, which is integral to building out your database.

Pro Tip: As your database grows, the segments and tags you use may evolve and change. Make sure you are tending to your database regularly to keep it up to date and intentional.

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