

# How to Get More

✓ Leads

✓ Clients

✓ Time

✓ Control

**From**

✓ Cash

*Top Producer 8i*

By Ray Cobel



## **What It Really Takes to Fully Implement a TOP PRODUCER® System**

By Ray Cobel, President, Cobel Target Marketing  
Certified TOP PRODUCER® Instructor

### **There's a lot more to it than most agents think.**

It is important to keep in mind that you are implementing a system that is well capable of running a multi-million dollar real estate business.

There is an awful lot of detail to schedule, coordinate and manage. There are thousands upon thousands of communications to distribute.

The system will do an excellent job of controlling the details while it saves you time and effort. To achieve this happy result, however, you should expect that an investment of time, effort and money will be needed.

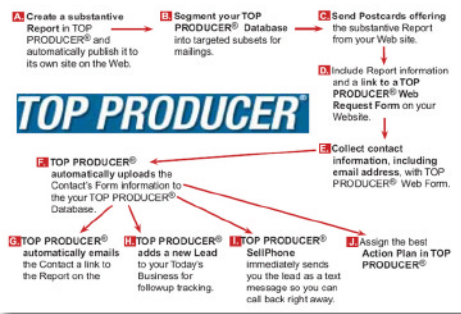
The mistake many agents make is thinking that all they need to do to get up and running is to learn a few daily operations skills. They fail to realize that there is a considerable amount of planning and setup that needs to happen before they can realistically expect to get the full benefit of using the system.



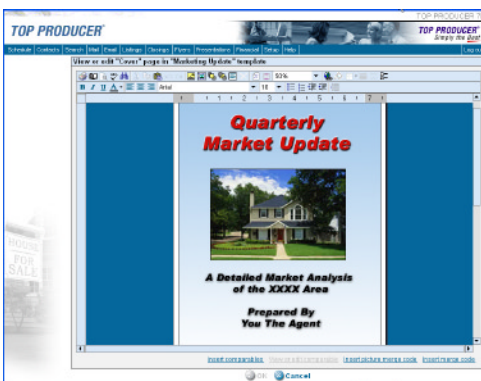
*Ray Cobel*

# The Four Keys to Successful System Implementation

*TOP PRODUCER is a very comprehensive system. Do you have a comprehensive strategy for using it?*



*Automating your communications is a key to saving time and improving consistency.*



## 1. Consulting

The goal is to automate your real estate business, and you're unique. Part of the task is to take the best of what you've proven to work for you, and automate it. The other part is to incorporate additional features that go above and beyond what you've been able to do in the past. During our consulting process we go through three steps.

### Identify What's Working

We take a close look at all of your buyer, seller, listing, closing and marketing processes. We identify all the steps and documents involved.

### Identify What's Missing

Then we match your processes against the best practices for buyers, sellers, listings, closings and marketing to see what should be added.

### Outline Your Automation Plans

Once we're clear on what's working and what to add we create a comprehensive automation plan.

## 2. Communications

There are a lot of routine communications in the real estate business. The more of them you automate, the easier it will be to accelerate your business. There are three steps to building your communications library.

### Capture Existing Communications

No doubt you've been distributing communications all along. Perhaps they're in Word or some other word processor. Or maybe you have hard copy originals that you keep photocopying. We need to round these all up and turn them into templates.

### Identify Additional Communications

You may not already have all the communications you will need, especially if you are planning to bump your marketing campaigns up a notch or two. We can help you identify additional sources of materials that can be turned into templates.

### Create Custom Communications

If you don't have or can't find just what you're looking for, we have the writing and graphics skills to help you create it from scratch.

### **3. Systems**

The first two steps are preparation for the major work of implementing your system. The following outline spells out the details.

#### **A. Set Your TOP PRODUCER® Implementation Goals**

Here we generally determine which features you are committed to implementing.

1. Appointments
2. Calendar
3. Calls
4. Closing Tracking
5. Closing Reporting
6. Database
7. Delegation/Supervision
8. Email
9. Envelopes
10. Flyer Publishing
11. Labels
12. Lead Tracking
13. Letters
14. Listing Tracking
15. Listing Reporting
16. MLS Import
17. Offline Access
18. Palm Sync
19. Postcards
20. Presentation Publishing
21. Referral Tracking
22. SellPhone
23. To Do Lists
24. Web Lead Capture

#### **B. Complete Basic Setups**

These basic setups must be completed in order for the rest of the system to work as expected.

##### **1. Agent Setup**

- A. Signature
- B. Logo
- C. Photo
- D. Email Address
- E. Web Site Address
- F. Primary phone numbers
- G. Basic Defaults

*These are the major features of the TOP PRODUCER System.*

*How many of them do you want to use?*

*How many are you using effectively now?*

*Built in Web forms support lead capture and automated follow-up.*

**Page example**

Kelly Agent, CCIM, CRB, GRI, Ph.D.  
Phone: 1(123)123-4567  
Email: [tp\\_team@topproducer.com](mailto:tp_team@topproducer.com)

DOVE REALTY

Please enter your information in the following fields and click the submit button.

First name:   
Last name:   
Email:   
Phone: (  ) -  -   
Best time to reach me:

**Other information and comments**

I am:  Buying  Selling  Both

Comments:

Submit

## 2. Assistant Setup

- A. Signature
- B. Logo
- C. Photo
- D. Email Address
- E. Web Site Address
- F. Primary phone numbers
- G. Basic Defaults

## 3. Email Setup

- A. POP 3s
- B. User name(s)
- C. Password(s)

## 4. Customer Web Page

- A. Picture
- B. Logo

## 5. Lead Inquiry Form(s) Setup

- A. Layout
- B. Source
- C. Inquiry Form

## 6. Lead Inquiry Form(s) on Web Site(s)

- A. Number of Sites
- B. Template Site
- C. Custom Site
- D. Pass to ISP
- E. RC Implements

## 7. TOP Connector

- A. Purchase
- B. User
- C. Password
- 8. SellPhone
- A. Purchase
- B. Setup
- C. Test
- D. Orient
- 9. Palm Sync
- A. Purchase
- B. Download
- C. Install
- D. Sync
- E. Orient

## 10. Hot Marketer

- A. Purchase
- B. Install
- C. Orient

## C. Maximize Your Database

Your database must be completed loaded into the system, and it must be segmented to support target marketing.

- 1. Total Count
- 2. Email Count
- 3. Contact Types
- 4. Farm Records
- 5. Agent Records

## D. Define Your Farm Marketing (12 Direct) Campaign

Industry surveys reveal that, on average, twelve contacts per year made to un-met people yield 1 transaction for every 50 records in a farm database. The database and each of the contacts must be defined.

- 1. Acquire Database
- 2. Format Database
- 3. Upload Database
- 4. Month 1
- 5. Month 2
- 6. Month 3
- 7. Month 4
- 8. Month 5
- 9. Month 6
- 10. Month 7
- 11. Month 8
- 12. Month 9
- 13. Month 10
- 14. Month 11
- 15. Month 12

*Building and segmenting your database is the key to effective target marketing.*

Search for	
- Select contact type -	▼
- Select contact type -	▲
1 On Plan	
12 Direct	
33 Touch	
6i	
7i	
8 X 8	
8X8	
AVR	
AEE	▼

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## **E. Define Your Relationship Establishment Marketing (8x8)**

To grow your business you must continually meet new people. When you meet them you must quickly position yourself as the best realtor they know. The most effective way to do that is to tell your story through eight contacts in eight weeks. The nature and content of each of those contacts must be defined.

1. Week 1
2. Week 2
3. Week 3
4. Week 4
5. Week 5
6. Week 6
7. Week 7
8. Week 8

## **F. Define Your Relationship Maintenance Marketing (33 Touch)**

Industry surveys reveal that, on average, thirty-three contacts per year made to previously met people yield 2 transactions for every 12 records in a met database. The database and each of the contacts must be defined.

1. Touch 1
2. Touch 2
3. Touch 3
4. Touch 4
5. Touch 5
6. Touch 6
7. Touch 7
8. Touch 8
9. Touch 9
10. Touch 10
11. Touch 11
12. Touch 12
13. Touch 13
14. Touch 14
15. Touch 15
16. Touch 16
17. Touch 17
18. Touch 18
19. Touch 19
20. Touch 20
21. Touch 21
22. Touch 22
23. Touch 23
24. Touch 24
25. Touch 25
26. Touch 26
27. Touch 27

- 28. Touch 28
- 29. Touch 29
- 30. Touch 30
- 31. Touch 31
- 32. Touch 32
- 33. Touch 33

## G. Setup Your Communication Library

All of the documents that will be used in the three marketing campaigns described in D, E, and F above must be setup as templates in the Communication Library. In addition, all other flyers, presentations and publications must also be setup.

### 1. Letters

- A. Buyer Follow-up
- B. Seller Follow-up
- C. 8x8
- D. 33 Touch
- E. 12 Direct

### 2. Email

- A. Buyer Follow-up
- B. Seller Follow-up
- C. Marketing Response Follow-up
- D. 8x8
- E. 33 Touch
- F. 12 Direct

### 3. Postcards

- A. Buyer Follow-up
- B. Seller Follow-up
- C. 8x8
- D. 33 Touch
- E. 12 Direct

### 4. Labels

- A. Customize layout

### 5. Envelopes

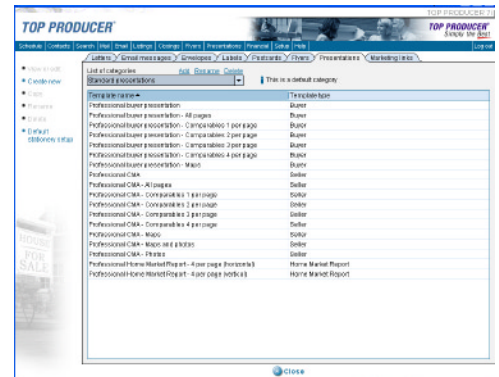
- A. Customize layout

### 6. Flyers

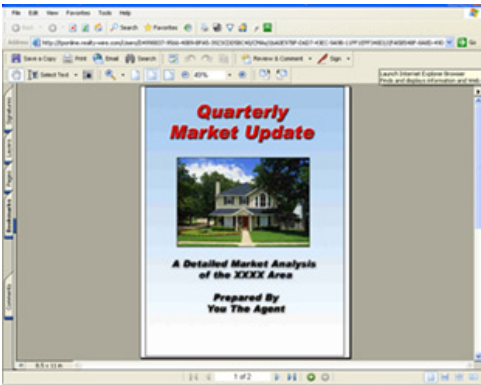
- A. Select Layout(s)
- B. Customize Layout(s)



*Automated communications will enable you to build and maintain many more relationships, with much less time and effort.*



*The Web publishing capabilities fast, easy, high quality and virtually free.*



## 7. Seller Presentation(s)

- A. Copy
- B. Delete Pages
- C. Add Pages
- D. Modify Pages

## 8. Buyer Presentation(s)

- A. Copy
- B. Delete Pages
- C. Add Pages
- D. Modify Pages

## 9. Marketing Offer Publication

- A. Offer Strategy
- B. Cover Design
- C. Content Creation
- D. Template Setup
- E. Publish to Web
- F. Link to Library
- G. Response Email Template Setup

## 10. Other Web Publication(s)

- A. Cover Design
- B. Content Creation
- C. Template Setup
- D. Publish to Web
- E. Link to Library
- F. Response Email Template Setup

## 11. Marketing Link Library

- A. Setup Link(s)

## H. Setup Your Buyer Action Plans

When you meet potential buyers you must qualify them and assign an appropriate follow-up plan.

### 1. Hot Buyer Action Plan

- A. Outline Steps
- B. Documents into Communication Library
- C. Setup Action Plan

### 2. Warm Buyer Action Plan

- A. Outline Steps
- B. Documents into Communication Library
- C. Setup Action Plan

## I. Setup Your Seller Action Plans

When you meet potential sellers you must qualify them and assign an appropriate follow-up plan.

### 1. Hot Seller Action Plan

- A. Outline Steps
- B. Documents into Communication Library
- C. Setup Action Plan

### 2. Warm Seller Action Plan

- A. Outline Steps
- B. Documents into Communication Library
- C. Setup Action Plan

## J. Setup Your Listing Plans

TOP PRODUCER® comes pre-loaded with a listing plan. It is a good starting point, but it will definitely need customization. These are the steps to getting your Listing Plan into shape.

1. Direction
2. Copy
3. Delete
4. Add
5. Modify
6. Assignments

## K. Setup Your Closing Plans

TOP PRODUCER® comes pre-loaded with a closing plan. It is a good starting point, but it will definitely need customization. You are likely to want separate 30, 45 and 60 day versions for both Buyers and Sellers. You may also want separate Closing Plans for new construction and vacant land.

These are the steps to getting your Closing Plans into shape.

1. Direction
2. Copy
3. Delete
4. Add
5. Modify
6. Assignments

*Plans are the key to mastering automation and control.*

The screenshot shows the 'Plans setup' window with a navigation menu at the top: 'Action plans', 'Listing plans', 'Closing plans', 'Marketing report plans', and 'Closing report plans'. The 'Listing plans' section is active, showing a dropdown menu with '3-Month high-touch buyer prospecting plan (email)' selected. Below the menu is a table of activities for this plan.

Select all	Activity	Description	Days	From	Remin.	Drop off	Assigned to
<input type="checkbox"/>	Email	Initial follow-up	2	From plan starting date	0	2	Current user
<input type="checkbox"/>	Email	Future home questionnaire	5	From plan starting date	0	3	Current user
<input type="checkbox"/>	Call	Follow-up	14	From plan starting date	0		Current user
<input type="checkbox"/>	Email	Use the latest technology	21	From plan starting date	0	3	Current user
<input type="checkbox"/>	Email	Testimonials	28	From plan starting date	0	3	Current user
<input type="checkbox"/>	Call	Follow-up	35	From plan starting date	0		Current user
<input type="checkbox"/>	Email	Making decisions	42	From plan starting date	0	3	Current user
<input type="checkbox"/>	Email	Mortgage financing	49	From plan starting date	0	3	Current user
<input type="checkbox"/>	Call	Follow-up	56	From plan starting date	0		Current user
<input type="checkbox"/>	Email	How I work	61	From plan starting date	0	3	Current user

*We log into your system with you via simultaneous phone/Web connection. It's personalized training to the max.*



## 4. Training

To get the most out of your TOP PRODUCER® System using it must become part of your daily routine. Routine usage doesn't come all at once. It happens over time as a progression through a series of steps.

### **Awareness**

First you must be generally aware of what the system can do for you. It's sort of like learning that a car has an accelerator to make it go and brakes to make it stop. Awareness of your new capabilities will provide some excitement and motivation to carry you through the next step.

### **Understanding**

Second, you must gain a deeper understanding of how the various parts of the system work together. Knowing that a car has brakes and an accelerator is not enough. You need to know exactly where they are and actually step on them.

### **Skill**

Stepping on accelerators and brakes a few times does not create skill. You've got to do it a number of times, in different traffic conditions to develop true skill.

### **Routine**

Only after you've gained skills, and use them everyday, will these new skills become routine. The good news is that these skills do become routine and you will get to the point of using them effortlessly.

There are two basic categories of skills:

### **Learn Your Daily Use Skills (Driving)**

1. Today's Business
2. My Calendar
3. Add Contacts
4. Searches
5. Ad Hoc Scheduling
6. Add Contact Types
7. Add Photographs
8. Future Home
9. Scheduling
10. Action Plans
11. History
12. Notes
13. Appointment Scheduling
14. Assigning Action Plans
15. Email Processing
16. Printing

## **Learn System Maintenance Skills (Under the Hood)**

1. Communications Template Modifications
2. Plan Modifications
3. Basic Setup Modifications

So you see, there is a beginning, middle and end to implementing your system. It probably takes more than you thought going in, but isn't that true of everything that's really worthwhile?



*We can deal with your “under-the-hood” issues, so you don’t have to.”*

# Why Go Through All That?

**There are some pretty appealing incentives:**

## **Income**

More marketing consistency, better follow-up, quicker response are all benefits that can translate into greater income.

## **Time**

Automation translates into tremendous time savings. You can either reinvest this saved time in your business, or spend it somewhere else like family, or yourself.

## **Control**

There are a zillion details in the real estate business, and many that can hurt you if you're not on top of them. Your system is the key to mastering detail control.

## **Ease**

System integration and automation translate to production ease. Easier is better, and more fun.

## **Peace**

More money, time, control and ease translate into more peace of mind. Who doesn't want more of that?

The final reason to go through all that is because that's what it takes, if you want to get the most out of your system.

## **Expert Help Is Available**

Current technology enables me to remotely log into my clients' systems with them while we're on the phone. In effect, its like I'm sitting right with my clients in their offices working on their computers together.

We can work on all the issues outlined above together, then I can either show you how to deal with them, or in cases involving setup issues, I can simply do them for you.

Either way I can define a customized implementation process for you and quote a fixed fee. If you really want to use TOP PRODUCER® to take your business to the next level, I can certainly help you get there.

Let's talk. I can demonstrate how the remote technology works and analyze what it will take to get your system and team from where it is now to where you'd like to be.



**Ray Cobel**  
**805-494-9647**