

KELLER WILLIAMS REALTY INTERNATIONAL

Best Practices for Adding Monthly Phone Calls to 33-Touch Campaign

Includes Setup for eEdge and ML Pro

John Pohly

8/26/2011

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@ <http://mykw.kw.com/eedge> and click on "Webinars".

Best Practices for Adding Monthly Phone Calls to 33-Touch Campaign

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eEdge Setup Instructions:

Overview: Take an 8 x 8 campaign, turn off all 8 touches and add time-based events to call the contact 12 times during the course of a year. If you are going to use this to supplement the 33-Touch campaign then remove the standard phone call reminders....

Go to Manage eEdge Website

myControlPanel - Market Center: Keller Williams Realty International MC#0

myLeads (0) [New Lead](#)

myMarketing (0) [New Listings](#)
[\[hide options\]](#)

myTransactions (0) [Messages](#)
[\[show options\]](#)

myContacts
[View Contacts](#)
[Add New Contacts](#)

[Market Me](#)
[Market My Listings](#)
[Manage KWLS](#)
[Manage eEdge Website](#)
[Manage eAgentC Website](#)

Click on Create Marketing

My Inbox

- Messages
- Webmail (4)
- Reminders

Contacts

Market My Listings

Search MLS

Create Marketing

Admin

- ▶▶ Website
- Email
- Site Activity
- Performance
- Evaluator

Click on an 8x8 Campaign (does not matter which one):

The screenshot shows the myMarketing Design Center interface. At the top, there is a red header with the myMarketing logo and a welcome message. Below the header, there are navigation tabs for Profile and Design Center. The Design Center is active, showing a navigation menu with options like Overview, Contact Info, Office Info, Logo, Photo, Postal Indicia, and Preferences. The main content area is titled 'Home' and features a 'Quick Start' section with instructions to create a new Subject Folder, Project, or select a Design. Below this is a 'Create New Project' section with a list of project types: Flyer, Postcard, Presentation, and Campaign. To the right, there is a 'Welcome John Pohly' message and a 'MyMarketing' section explaining the platform's capabilities. A promotional image for 'KW Automated Marketing Campaigns' is shown, along with links for '12 Direct, 8x8 for Buyers, 8x8 for Sellers, 33-Touch'.

Click Select:

The screenshot shows the myMarketing Design Center interface with the '8x8 Campaign for Buyers' selected. The top navigation bar includes the myMarketing logo, a welcome message for John Pohly, and a 'Log Out' link. The Design Center is active, and the 'Design Gallery' is visible on the left. The '8x8 Campaign for Buyers' is highlighted in the gallery. The main content area shows the campaign details, including a description, campaign type (Time Based), and total events (9). The 'Events by Type' section shows Email: 7 and Notification: 2. A 'Select' button is visible next to the total events count.

Give it a Campaign Name:

Design Gallery 8x8 Campaign for Buyers

Pre-Built Campaign. Description and images here.

et My Listings (59)
et My Business
arketing to Bu
8x8 Campaign
Buyer Consul
arketing to Sel
keting to My Sp

Create New Campaign

Campaign Name

Current: 28 Maximum: 64

Close Next

Select the appropriate Group that you want to contact monthly:

Design Gallery 8x8 Campaign for Buyers

Pre-Built Campaign. Description and images here.

et My Listings (59)
et My Business
arketing to Bu
8x8 Campaign
Buyer Consul
arketing to Sel
eting to My Sp

Select Contacts and Groups

Contacts: Individuals Groups

Filter

Group Name ▲	Included Groups
LinkedIn	33 Touch

< Back | Next > 1

Back Save

Click on Start:

Monthly Phone Call Reminders

Account Balance: \$0.00

Warning:

- Your current account balance is \$0.00

Campaign Type:

Time Based

Total Events:

9

Total Contacts:

1

Status:

Inactive

Upcoming Delivery:

N/A

Events by Type

Email: 7 | Notification: 2



Start

Archive Campaign


Edit Campaign

Delete Campaign

Now select "Off" for every event (except for the last one):

 <p>Preview</p>	<p>Event Name: Touch 7: "Think y...d to buy a home?"</p> <p>Design Template: KW_ENEWSLETTER_006</p> <p>Date to Send: 43 day(s) after contact is added</p>	<p>Status: <input type="radio"/> On <input checked="" type="radio"/> Off</p> <p>Event Type: Email</p>
 <p>Preview</p>	<p>Event Name: Touch 8: "Did you know..."</p> <p>Design Template: KW_ENEWSLETTER_007</p> <p>Date to Send: 50 day(s) after contact is added</p>	<p>Status: <input type="radio"/> On <input checked="" type="radio"/> Off</p> <p>Event Type: Email</p>

On the last event, change the "Date to Send" to 365 days. Click "Edit Event":

	<p>Event Name: Your eEdge 8x8 Buy... to a conclusion!</p> <p>Design Template: N/A</p> <p>Date to Send: 51 day(s) after contact is added</p>	<p>Status: <input checked="" type="radio"/> On <input type="radio"/> Off</p> <p>Event Type: Notification</p>	<p>Edit Event</p> <p>Details</p>
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Edit Campaign Event ✕

Event Name

Current: 57 Maximum: 64

Number of Days Until Event Fires

Specify the action you'd like to take.

You will also want to change the event name and add this script for the action (you can Copy and Paste the highlighted text from this PDF document:

Event Name = Monthly phone calls campaign is complete - action needed!

Number of Days = 365

Specify the action = Your monthly phone calls campaign is complete. Remember to extend this campaign or remove from this Group and then add back to this Group to reset a new year of monthly phone calls.

Click Save once you have made these updates.

Now add your events (12 phone call reminders). Click on Add:

Monthly Phone Call Reminders Account Balance: \$0.00 ▶

⚠ Warning:

- Your current account balance is \$0.00

Campaign Type: Time Based	Status: Active	<input type="button" value="Pause"/>
Total Events: 9	Upcoming Delivery: N/A	<input type="button" value="Archive Campaign"/>
Total Contacts: 1	Events by Type Email: 7 Notification: 2	<input type="button" value="Edit Campaign"/>
		<input type="button" value="Delete Campaign"/>

▶ **Contacts**

▶ **History**

▼ **Events**

Select Type of “Notification”

Event Name = Phone Call 1 Number of Days = 15 Specify the Action = Updates/Referrals Click Save.

Create New Campaign Event ✕

Type

Email Notification Print and Mail

Event Name

Phone Call 1

Current: 12 Maximum: 64

Number of Days Until Event Fires

15







Specify the action you'd like to take.

Updates/Referrals

Repeat this process until you have all 12 phone calls. (Use the following number of days for additional Events):

- Phone Call 2 = 45
- Phone Call 3 = 75
- Phone Call 4 = 105
- Phone Call 5 = 135
- Phone Call 6 = 165
- Phone Call 7 = 195
- Phone Call 8 = 225
- Phone Call 9 = 255
- Phone Call 10 = 285
- Phone Call 11 = 315
- Phone Call 12 = 345

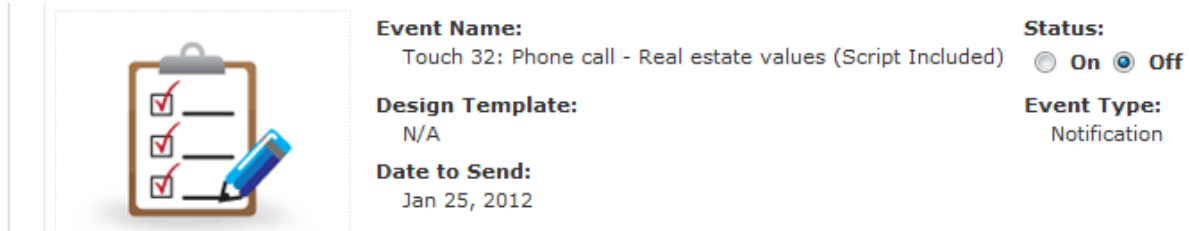
Change your Status on “Phone Call 1”, Phone Call 2” etc. to “On”:

	Event Name: Phone Call 1 Design Template: N/A Date to Send: 15 day(s) after contact is added	Status: <input checked="" type="radio"/> On <input type="radio"/> Off Event Type: Notification	Edit Event Details
	Event Name: Touch 4: "Sellers are motivated!" Design Template: KW_ENEWSLETTER_004 Date to Send: 22 day(s) after contact is added	Status: <input type="radio"/> On <input checked="" type="radio"/> Off Event Type: Email	Edit Event Edit Project Edit Email Options Details
	Event Name: Touch 5: "Did you know..." Design Template: KW_ENEWSLETTER_005 Date to Send: 29 day(s) after contact is added	Status: <input type="radio"/> On <input checked="" type="radio"/> Off Event Type: Email	Edit Event Edit Project Edit Email Options Details
	Event Name: Touch 6: Follow-Up... Script Included) Design Template: N/A Date to Send: 36 day(s) after contact is added	Status: <input type="radio"/> On <input checked="" type="radio"/> Off Event Type: Notification	Edit Event Details
	Event Name: Touch 7: "Think y...d to buy a home?" Design Template: KW_ENEWSLETTER_006 Date to Send: 43 day(s) after contact is added	Status: <input type="radio"/> On <input checked="" type="radio"/> Off Event Type: Email	Edit Event Edit Project Edit Email Options Details
	Event Name: Phone Call 2 Design Template: N/A Date to Send: 45 day(s) after contact is added	Status: <input checked="" type="radio"/> On <input type="radio"/> Off Event Type: Notification	Edit Event Details

Housekeeping for eEdge and Market Leader Pro

Since these instructions teach you how to add time-based monthly phone calls to a 33-Touch campaign, you may want to remove the 3 phone calls from your current 33-Touch campaign.

Until Family Reunion 2012, the only remaining date-based phone call on 33-Touch Touch program is January 25th, 2012. You only have to change the Status to "Off" for this one event:



Event Name:
Touch 32: Phone call - Real estate values (Script Included)

Design Template:
N/A

Date to Send:
Jan 25, 2012

Status:
 On Off

Event Type:
Notification

Market Leader Pro Setup Instructions

The process is a little bit easier with Market Leader Pro because you have the ability to setup a custom campaign. There is no need to modify an 8x8 Campaign as we demonstrated for the eEdge users.

Overview: You will setup a new campaign for 12 monthly phone call reminders over the course of a year.

Go to Manage eEdge Website



myControlPanel - Market Center: Keller Williams Realty International MC#0

myLeads
(0) [New Lead](#)

myMarketing
(0) [New Listings](#)
[\[hide options\]](#)

myTransactions
(0) [Messages](#)
[\[show options\]](#)

myContacts
[View Contacts](#)
[Add New Contacts](#)

[Market Me](#)
[Market My Listings](#)
[Manage KWLS](#)
[Manage eEdge Website](#)
[Manage eAgentC Website](#)

Click on Create Marketing

My Inbox

- Messages
- Webmail (4)
- Reminders

Contacts

Market My Listings

Search MLS

Create Marketing

Admin

- ▶ Website
- Email
- Site Activity
- Performance
- Evaluator

Under Design Center, Portfolio – click on “New Campaign”



Give it a Campaign Name:

Create New Campaign

Campaign Name
Monthly Phone Call Reminders
Current: 28 Maximum: 64

Campaign Type
 Time Based Date Based

[If you would like to select a Pre-Built Campaign, please click here go to the Design Gallery.](#)

Close Next

Select the appropriate Group that you want to contact monthly:

Design Gallery

8x8 Campaign for Buyers
Pre-Built Campaign. Description and images here.

Select Contacts and Groups

Contacts: Individuals Groups

Filter

Group Name ▲	Included Groups
LinkedIn	33 Touch

< Back | Next > 1

Back Save

Now add your events (12 phone call reminders). Click on Add:

Campaign Type: Time Based	Status: Inactive	<input type="button" value="Start"/>
Total Events:	Upcoming Delivery: N/A	<input type="button" value="Archive Campaign"/>
Total Contacts: 2	Events by Type	<input type="button" value="Edit Campaign"/>
		<input type="button" value="Delete Campaign"/>

<input type="button" value="▶ Contacts"/>	<input type="button" value="Add / Remove"/>
<input type="button" value="▶ History"/>	
<input type="button" value="▼ Events"/>	<input type="button" value="Add"/>

Select Type of "Notification"

Event Name = **Phone Call 1** Number of Days = **15** Specify the Action = **Updates/Referrals** Click Save.

Create New Campaign Event

Type

Email Notification Print and Mail

Event Name

Phone Call 1

Current: 12 Maximum: 64

Number of Days Until Event Fires

15

Specify the action you'd like to take.

Updates/Referrals

(Continued on next page)

Repeat this process until you have all 12 phone calls. (Use the following number of days for additional Events):

- Phone Call 2 = 45
- Phone Call 3 = 75
- Phone Call 4 = 105
- Phone Call 5 = 135
- Phone Call 6 = 165
- Phone Call 7 = 195
- Phone Call 8 = 225
- Phone Call 9 = 255
- Phone Call 10 = 285
- Phone Call 11 = 315
- Phone Call 12 = 345

You now have 12 events (phone calls). Your 13th event needs to be a reminder to add them to a new campaign.

Create New Campaign Event

Type
 Email Notification Print and Mail

Event Name
Monthly phone calls campaign is complete - action needed!
Current: 0 Maximum: 64

Number of Days Until Event Fires
365

Specify the action you'd like to take.
Your monthly phone calls campaign is complete. Remember to extend this campaign or remove from this Group and then add back to this Group to reset a new year of monthly phone calls.

Close Save

Event Name = Monthly phone calls campaign is complete - action needed!

Number of Days = 365

Specify the action = Your monthly phone calls campaign is complete. Remember to extend this campaign or remove from this Group and then add back to this Group to reset a new year of monthly phone calls. Click Save once you have made these updates.

Social Media Reminder Campaigns

Adding phone calls to an existing campaign is just one example. Hopefully you have learned a lot about modifying campaigns (eEdge users) and creating new campaigns (ML Pro users).

Consider the possibilities:

Supplemental Facebook Campaigns

Supplemental LinkedIn Campaigns

Social media is just another way to connect to your contacts. You could setup a series of 12 monthly reminders to post on someone's Facebook Wall or message them on LinkedIn.