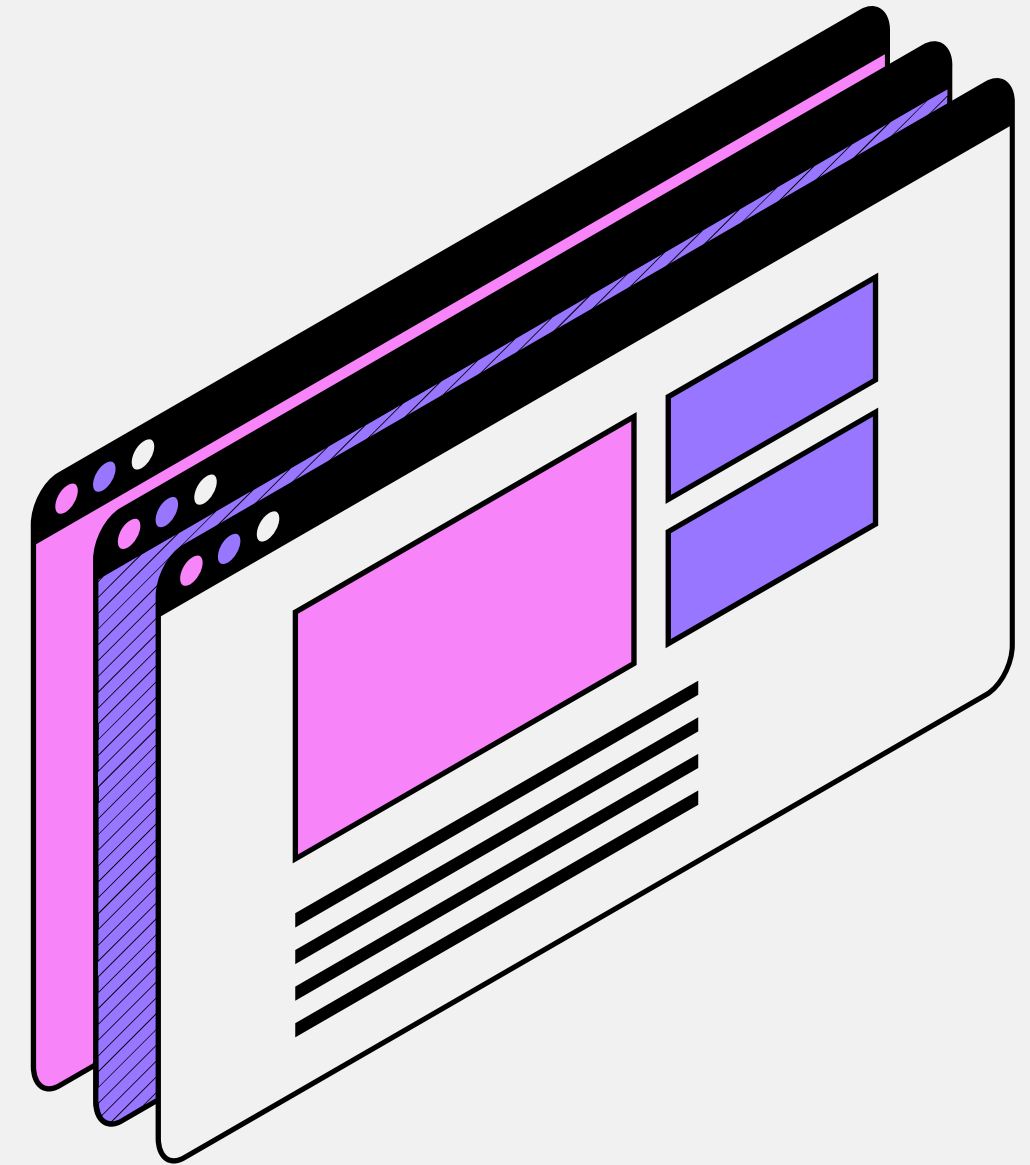


GEORGIA LEGACY GROUP

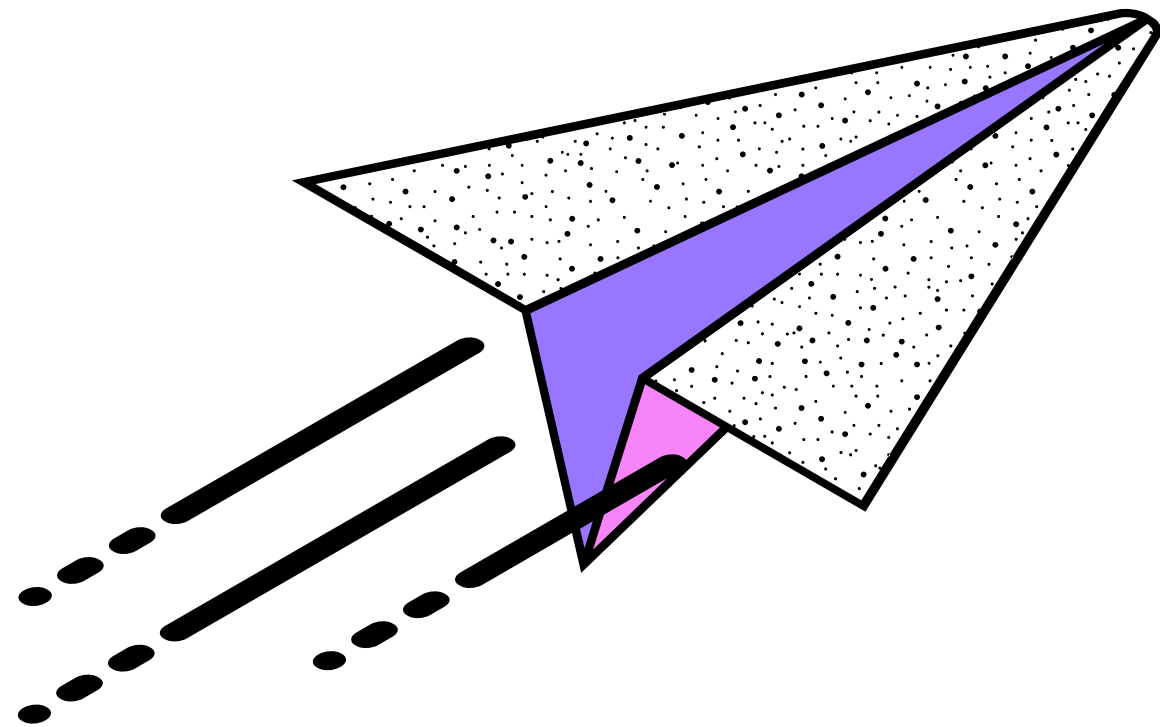
# Database Tags

## *that matter*

What you need to know about  
segmenting your database for success!



# Agenda



The 4 Laws of a Database

Tags vs. Fields vs. Notes

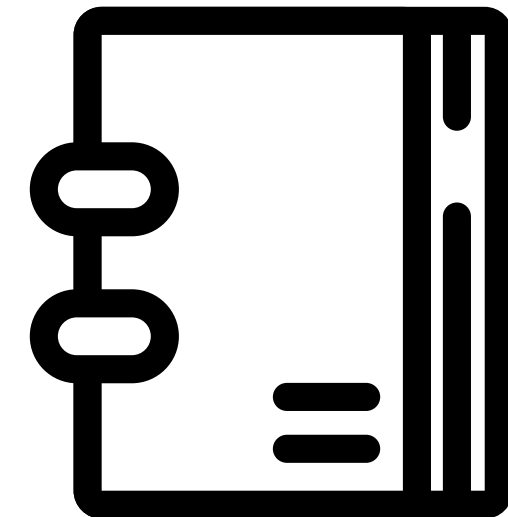
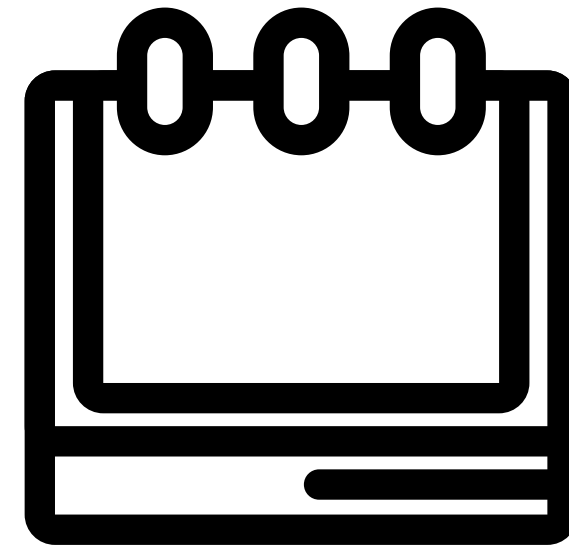
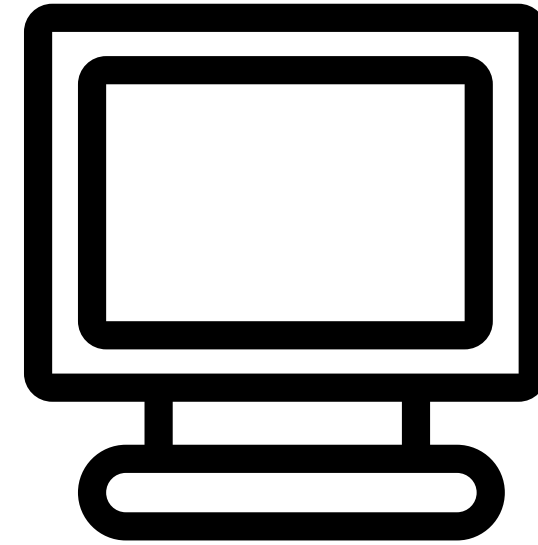
Where to Start, When to Expand

TAGS that Matter

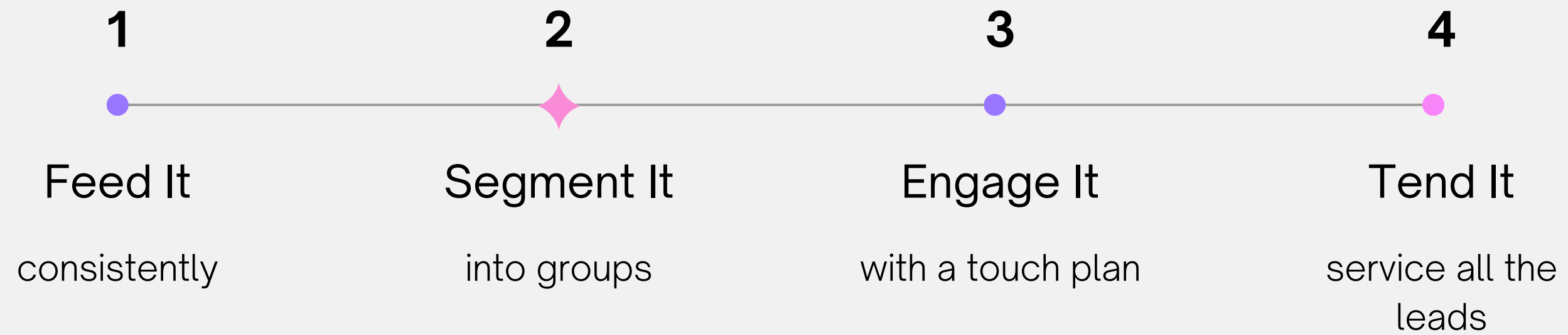
AHA's / Q&A's

# What is a Database?

It's building a predictable business around people who *know* you, *like* you, ***trust*** you, and are *willing to do business with you*.



# Effective Database

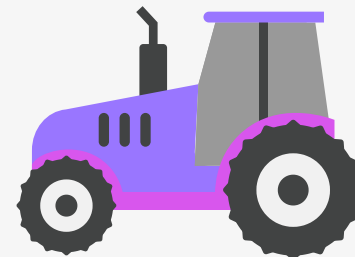


# Notes *vs.* Fields *vs.* Tags



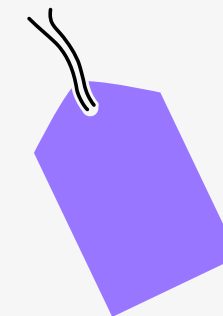
## Notes

longer, personal  
information that is  
important for you to know  
about the individual



## Fields

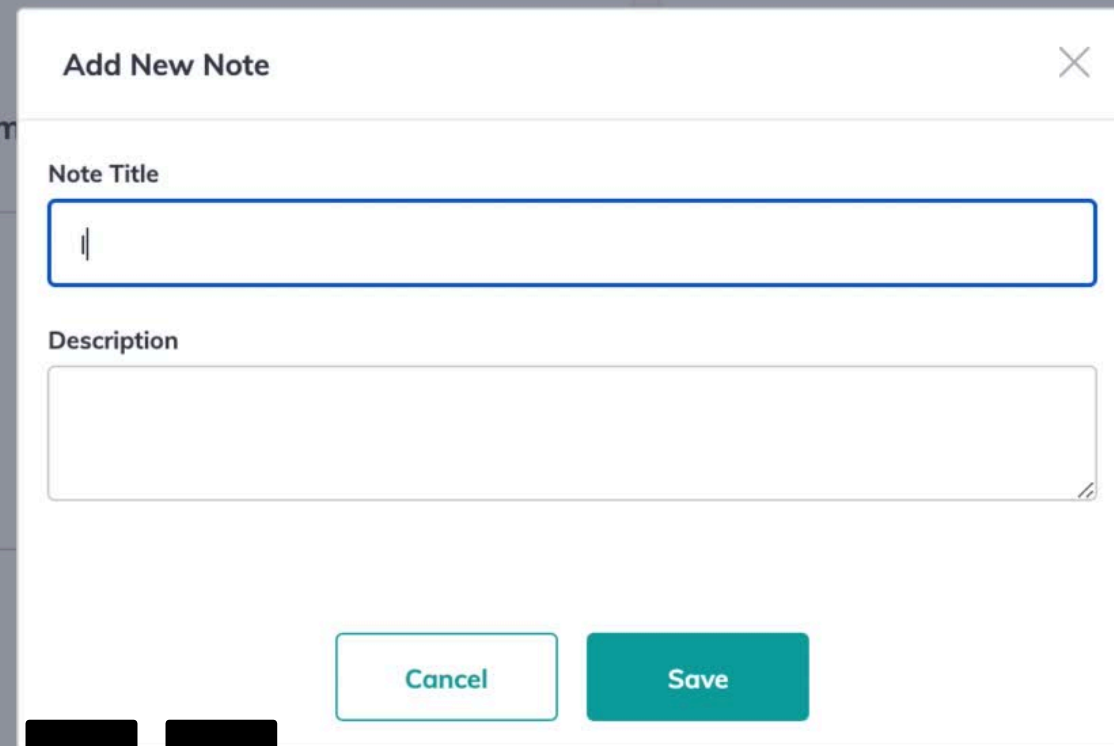
quick bits of info to be  
used for icebreakers,  
memory joggers, and  
recollection



## Tags

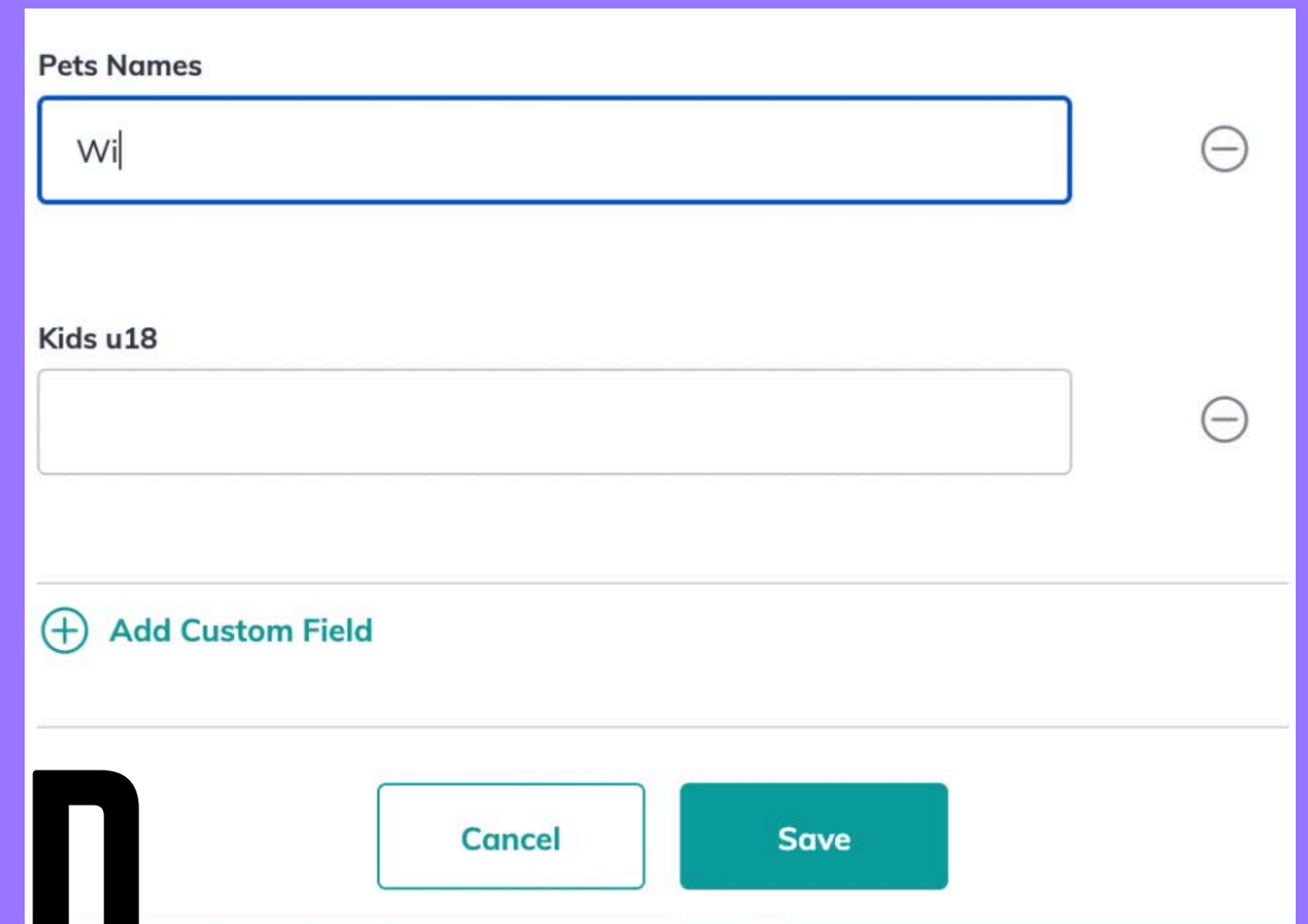
one word categories  
designated to contact with  
the intent for marketing

# NOTE



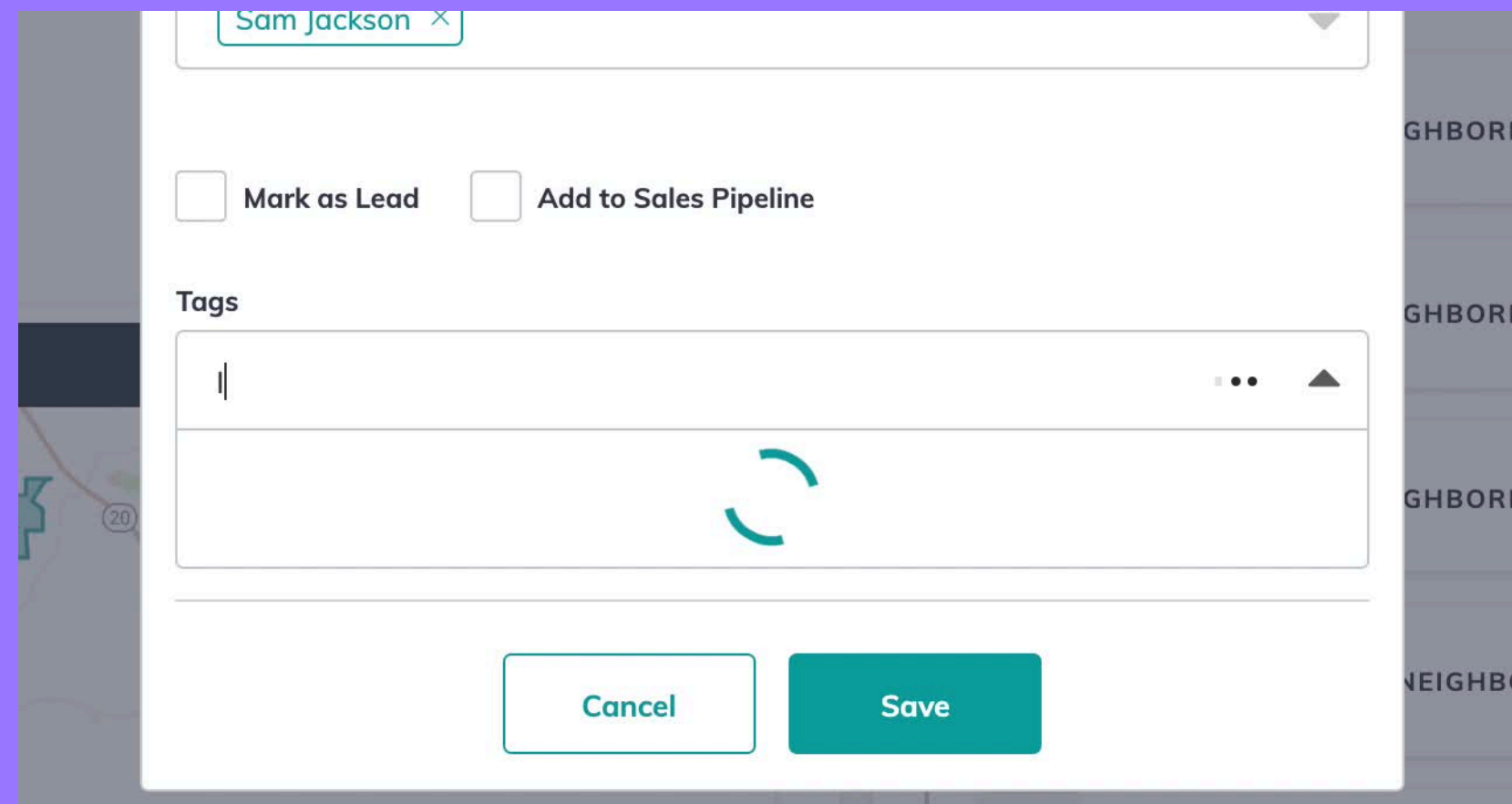
A modal form titled "Add New Note" with a close button (X) in the top right corner. It contains two input fields: "Note Title" and "Description". The "Note Title" field has a cursor and a vertical line. The "Description" field is a larger text area. At the bottom, there are "Cancel" and "Save" buttons.

# FIELD

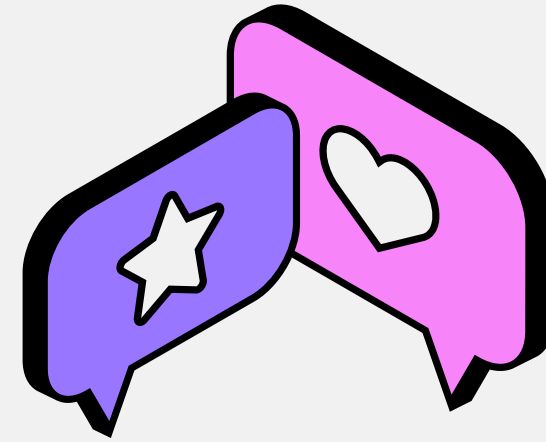


A form titled "Pets Names" with a close button (minus sign) in the top right corner. It contains two input fields: "Pets Names" and "Kids u18". The "Pets Names" field has the text "Wi" and a cursor. The "Kids u18" field is empty. Below the fields, there is a link "+ Add Custom Field". At the bottom, there are "Cancel" and "Save" buttons.

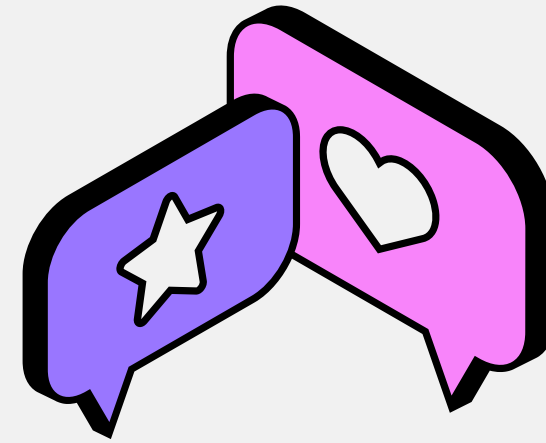
# TAG



A form titled "Tags" with a dropdown menu at the top showing "Sam Jackson" and a close button (X). Below the dropdown, there are two checkboxes: "Mark as Lead" and "Add to Sales Pipeline". The "Tags" field has a cursor and a vertical line. At the bottom, there are "Cancel" and "Save" buttons.



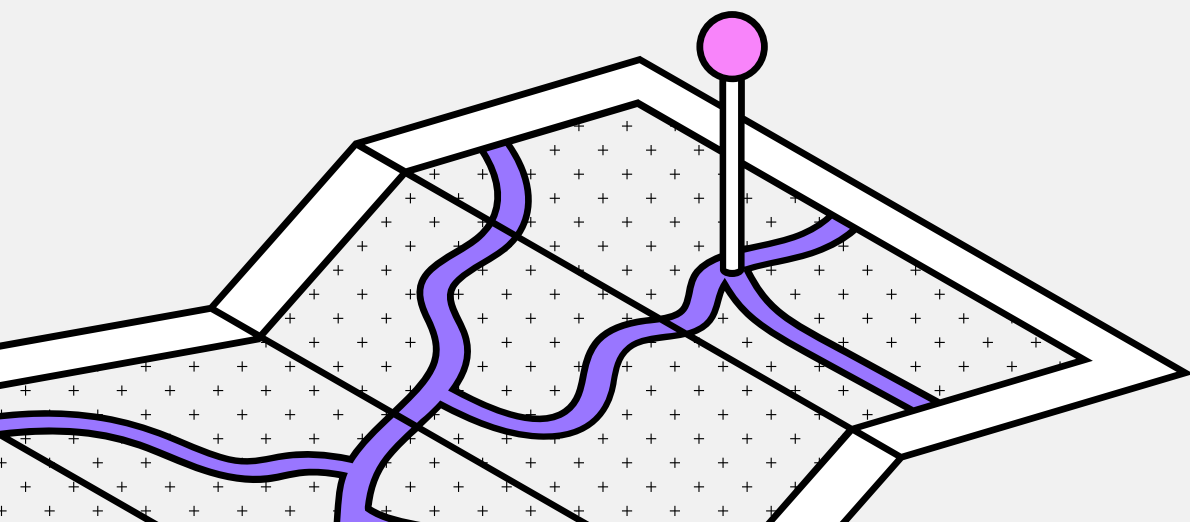
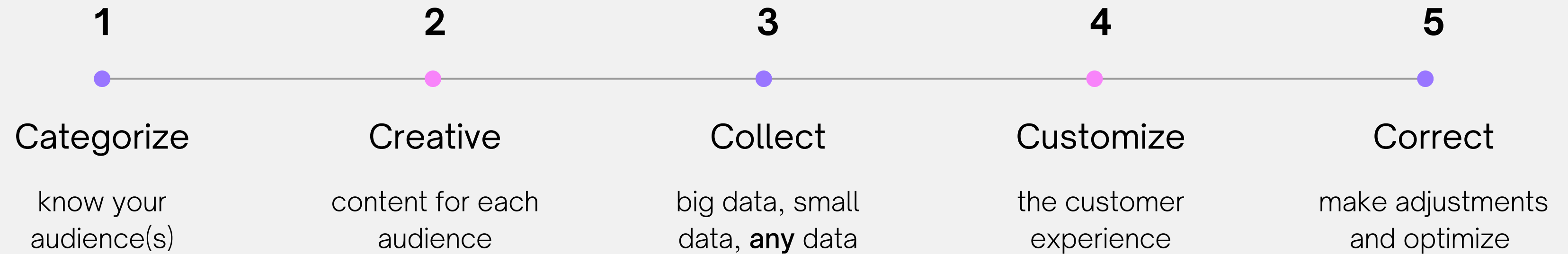
**TAGS allow you to organize  
multiple groups based on the  
*contextual* relationship that you  
have with them.**



**Marketing to tags in this manner is  
better known as  
Context Marketing**



# The 5 C's to Context Marketing



# Where to Start:

create a group for **buyer leads** and **seller leads** and **past clients** and **current clients**.

# When to Expand

How do you know when it's time to add a new category?

*ask yourself*

**Are you going to market to those people differently?**

# Top Tag Systems

Think of these as the larger bucket that your tags will fit into





# Real Estate Needs

## LOCATION

- WATER FRONT
- NEAR 400
- BELTLINE
- ITP OR OTP
- HOA/NO HOA

## AMENITY

- 1ST FLOOR MASTER
- FINISHED BASEMENT
- GOLF/SWIM
- GATED
- SIDEWALKS

## PRICE POINT

- OVER \$....
- UNDER \$.....
- RANGE \$...- \$....

## INTEREST RATE

- UNDER 4
- 5-6%
- 6-7%
- 7-8%
- UNDER 4%

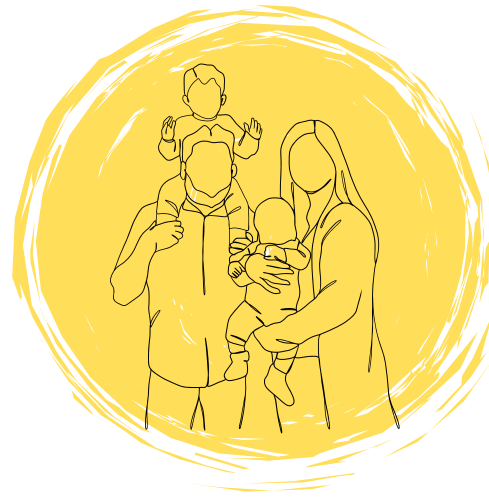
# THE 5 MOVES



FIRST TIME  
HOME BUYER



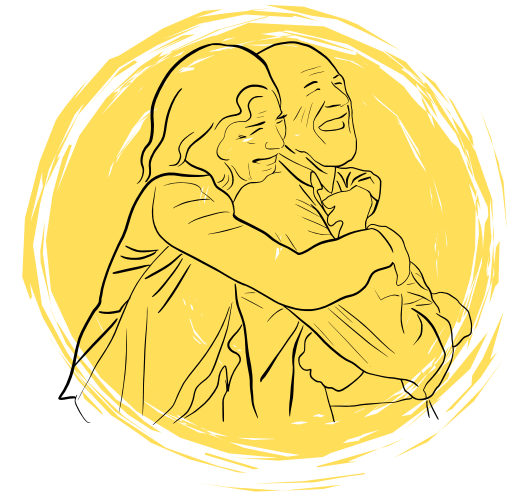
GROWING  
FAMILY



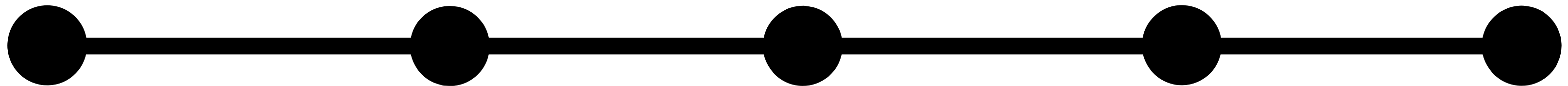
FIRST  
MOVE UP

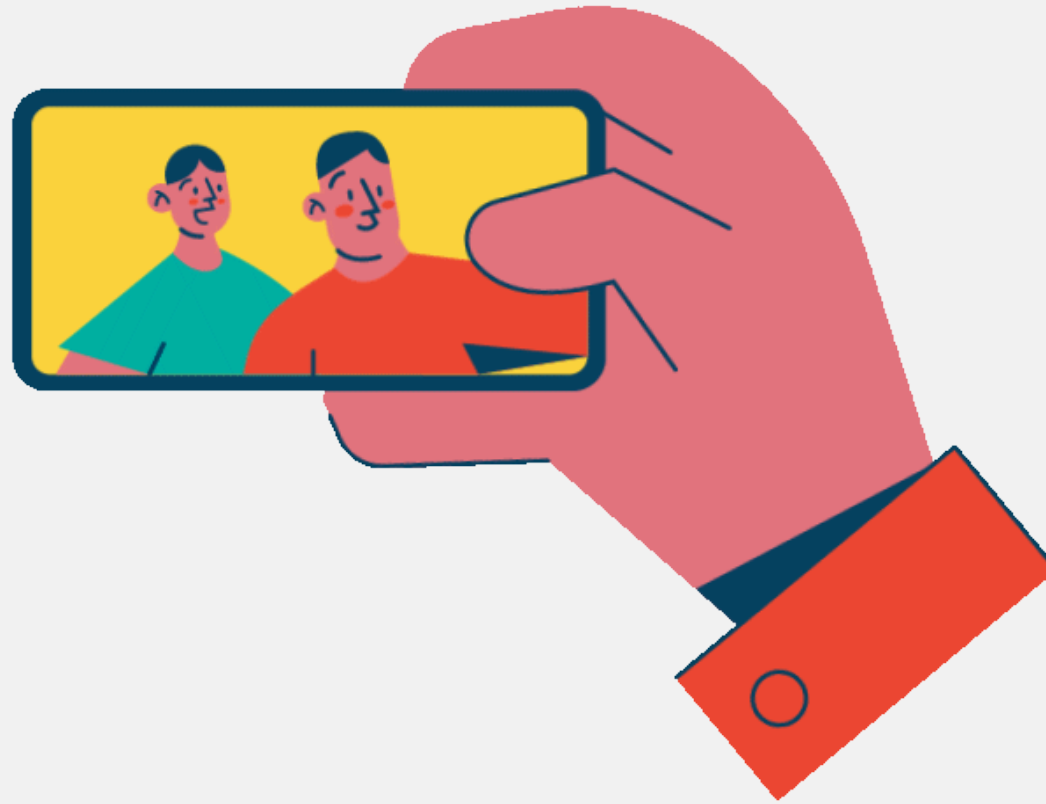


SECOND  
MOVE UP



DOWN  
SIZE





# How do you know them?

## RELATIONSHIP

- FRIEND
- FAMILY
- VENDOR PARTNER
- (EX) COWORKER

## ASSOCIATION

- HOA COMMITTEE
- CHURCH DIRECTORY
- SCHOOL BOARD
- KID'S LITTLE LEAGUE
- RUNNING CLUB

## SOURCE

- SOI OR SPHERE
- FACEBOOK
- OPENHOUSE
- DOORKNOCKING
- SIGN CALL
- AGENT(LOCATION)



## ALUMNI

- UGA
- GEORGIA TECH
- QUINNIPIAC
- BULLDOGS
- YELLOW JACKETS

## MILITARY

- ARMY
- NAVY
- MARINES
- RESERVIST

## CAREER

- OCCUPATION OR  
INDUSTRY
- FINANCIAL
- MEDICAL
- RETAIL
- TEACHER

## RELIGION

- HOLIDAYS OBSERVED
- BE 100% CERTAIN

## ACTIVITIES

- KID'S ACTIVITIES
- SPORTS TEAMS
- FANDOM





Personality/Behavior

**BEER**  
**LIQUOR**  
**WINE**

**COKE**  
**PEPSI**

**DISC**

**RED**  
**BLUE**

**ANIMAL**



Lead Gen

## ACTIVITY

- VIP
- TOP REFERRAL
- RAVING FAN
- TESTIMONIAL

## EXPERIENCE

- PAST CLIENT
- REPEAT SELLER
- REPEAT BUYER
- 1ST TIME HOME BUYER
- YEAR MOVED (2014)

## TYPE

- RESIDENTIAL
- CONDO
- INVESTOR
- LUXURY
- BANK/REO
- COMMERCIAL

## CONNECTION

- MET OR HAVEN'T MET
- AGENT (LOCAL)
- REFERRAL PARTNER
- VENDOR

## GEOGRAPHY

- STATE
- CITY
- COUNTRY



# Lead Follow Up

## PIPELINE

- RED, YELLOW, GREEN
- 10,9,8,7
- A,B,C
- 3MOS, 6MOS,12 MOS

## DTD2

A&W B&E D&O H&V  
C&K F&G M&X N&R  
S&U P&L T&J I&Q  
Y&Z

## MARKETING

- EVENTS
- MAIL LIST
- PIE LIST
- BIRTHDAY
- ANNIVERSARY
- NEWSLETTER



# Interests

## PETS

- DOG PERSON
- CAT LADY
- REPTILES
- CORGI

## HOBBIES

- BOATING
- RUNNING
- CARS
- GARDENING
- BOOKS

## LIFESTYLE

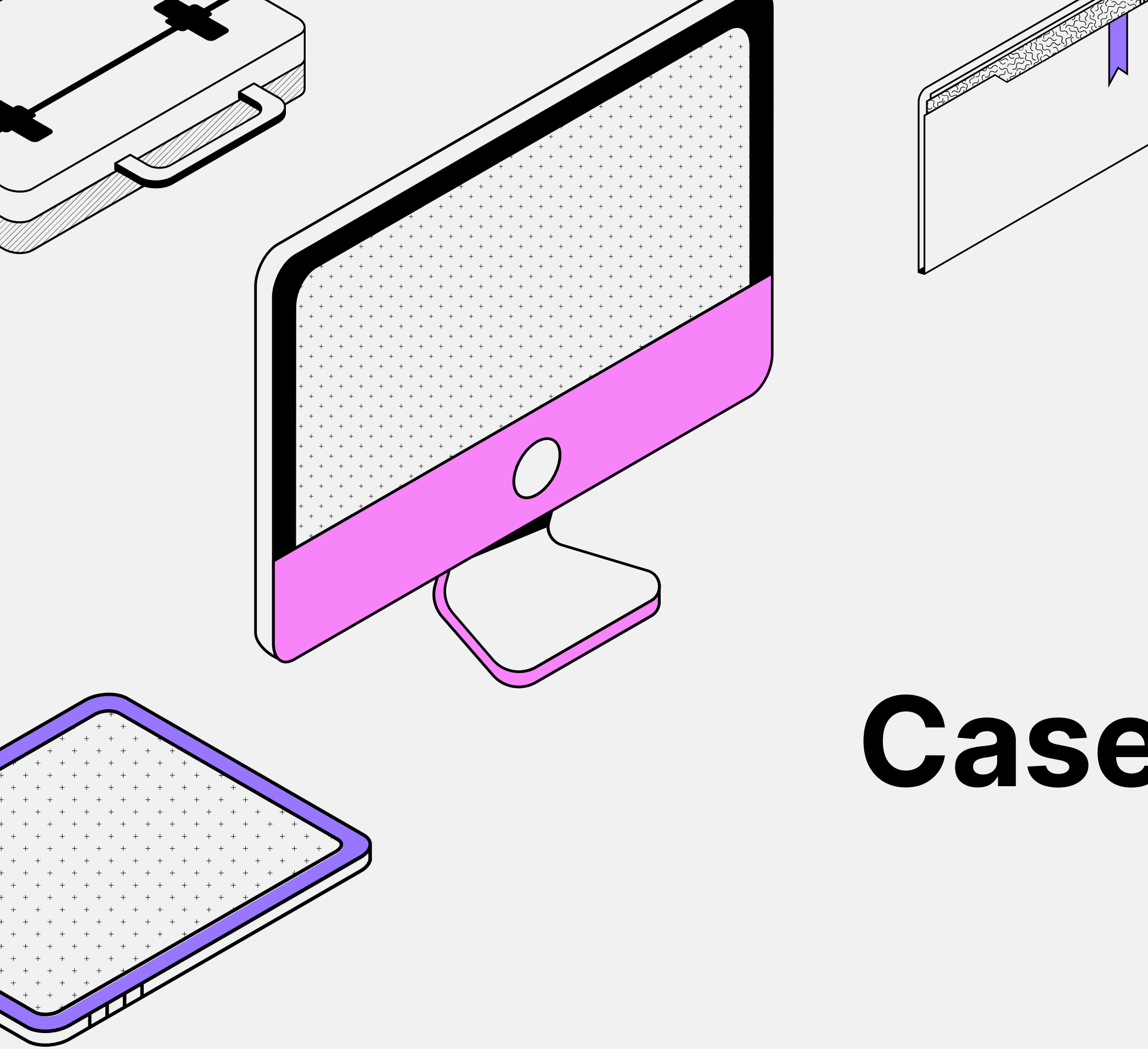
- DISNEY
- PELOTON
- CROSSFIT
- VEGAN
- APPLE
- JEEP

## MISC

- PRONOUNS
- FAVORITES
- CLOSING GIFT IDEAS
- COLLECTIONS
- SPORTS TEAM



AHA's



# Case Study

You've been given tickets to a Terp's Game - what tags would help you identify the right people to invite to the event?

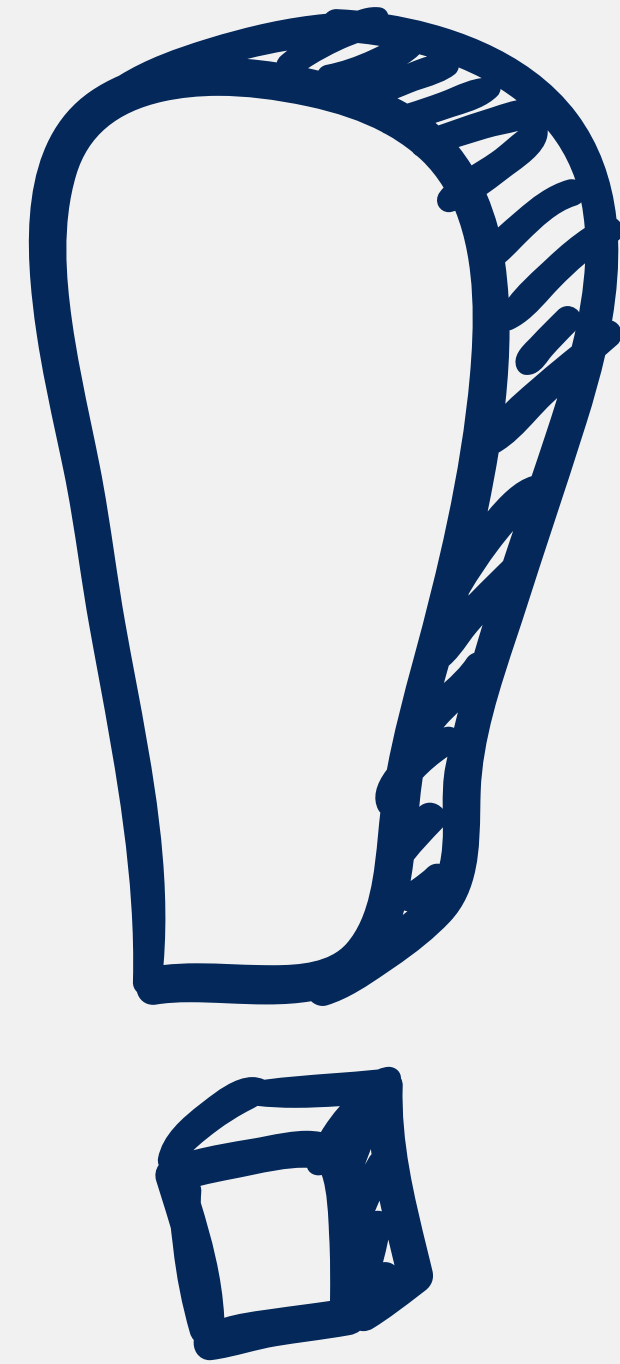
You have a new listing - what tags would help you market this new listing?

**bonus:** what tags would help you get more listings from this listing?



You have a new listing that needs a little bit of TLC - what tags would help you market this new listing?

Fall Festival is coming up...



AHA's & Questions