



TEAMLEGACY
ORGANIZATION
 **CANADA**

WELCOME

Team Legacy Canada Quarterly
April 25, 2023

Our MC for this afternoon's event



Adrienne Carlton



A Word from Our Sponsors

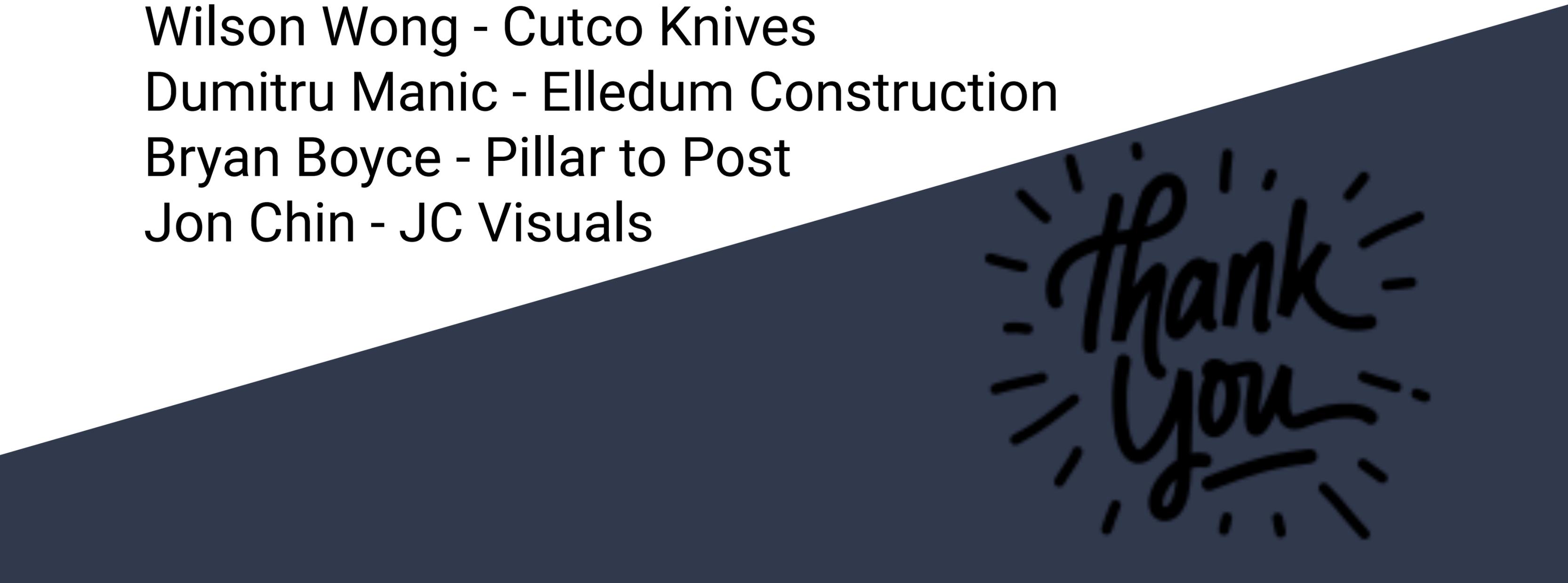
Moe Househ - Alberta Law

Wilson Wong - Cutco Knives

Dumitru Manic - Elledum Construction

Bryan Boyce - Pillar to Post

Jon Chin - JC Visuals



Thank
You

Moe Househ - Alberta Law



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SCAN ME





Jeff and Amanda Whitespeare

**Our Revenue Share Upline
from Houston, Texas
#1 Standard team at eXp for units
sold and GCI in 2022**

Our Focus Sessions for Today:

1. kvCORE Coaching - Aaron Farrell
2. Top Producer Panel - Tom Alison, David Lam, Brittany Primeau
3. Live & Interactive CMA: Best Practices - Joe Tolvay

Aaron Farrell - kvCORE CRM Training

Want to Learn More?

Contact Aaron and book a one
on one KV core tutorial session!

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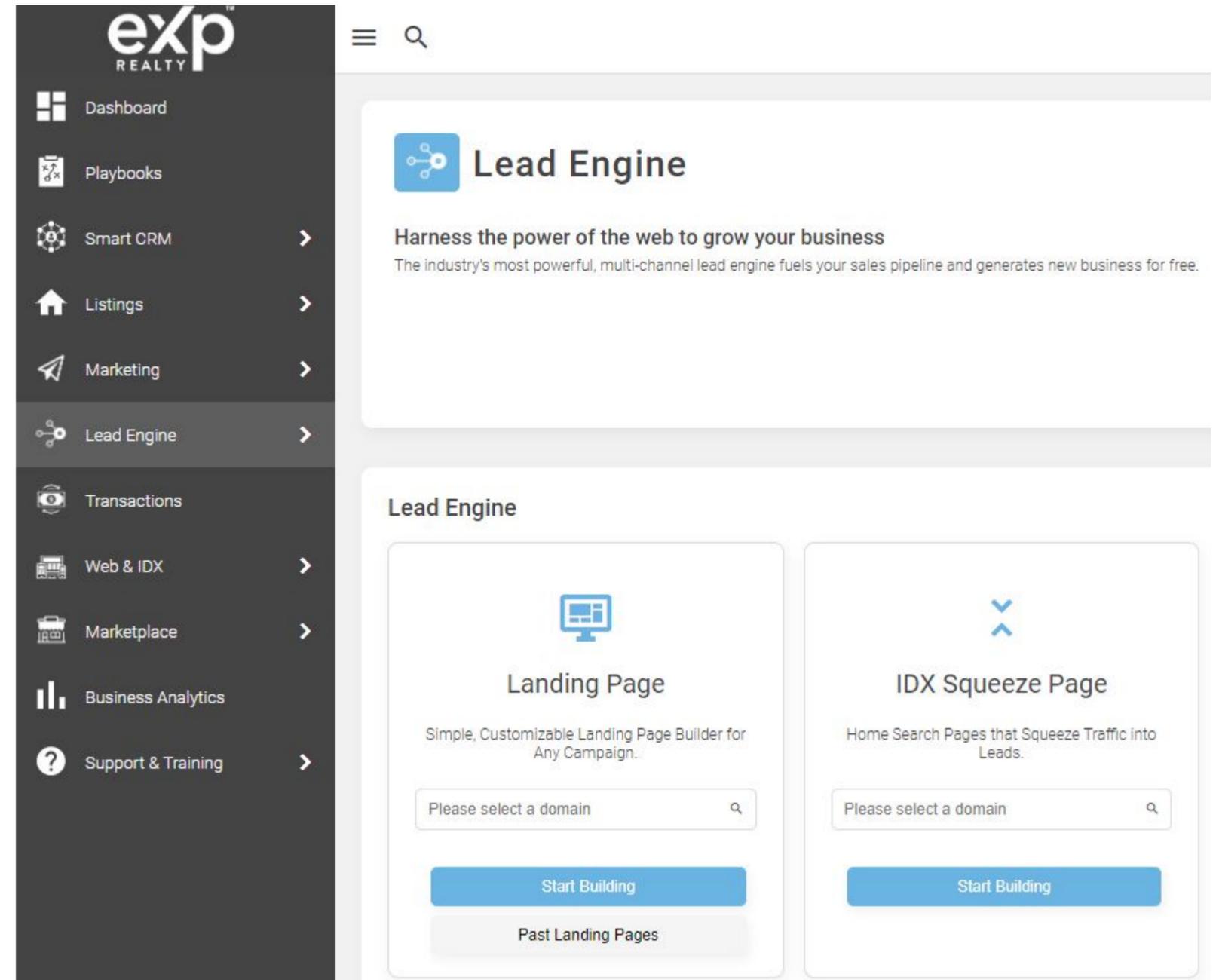
Introduction

- Welcome to the kvCORE PowerPoint presentation
- Discover how to effectively generate leads, nurture cold internet leads into warm actionable leads, work active leads, close deals, and nurture closed clients for repeat and referral business



1. Lead Generation

- Free and paid ways to get leads
- Utilize existing sphere, post active listings or pre-set searches for specific property types or areas using Squeeze Pages, post market reports and seller "Home Valuation" Pages to capture lead information
- Paid options include Property Boost, Google PPC ads, Google Display Branded Targeting, and Concierge service

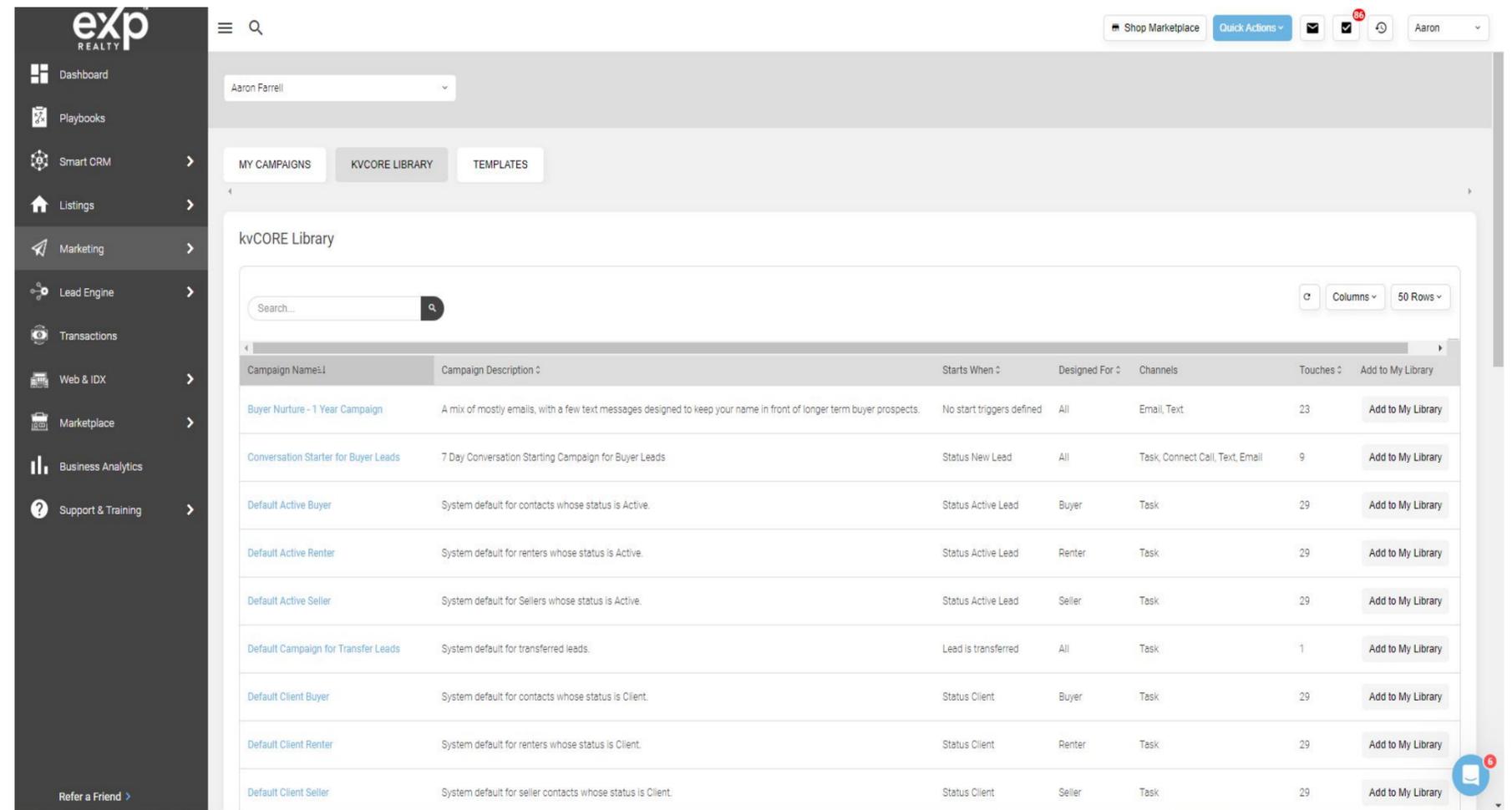


The screenshot displays the exp REALTY dashboard interface. On the left is a dark sidebar menu with the following items: Dashboard, Playbooks, Smart CRM, Listings, Marketing, Lead Engine (highlighted), Transactions, Web & IDX, Marketplace, Business Analytics, and Support & Training. The main content area features a 'Lead Engine' section with a blue icon and the text: 'Harness the power of the web to grow your business. The industry's most powerful, multi-channel lead engine fuels your sales pipeline and generates new business for free.' Below this, there are two cards under the heading 'Lead Engine':

- Landing Page:** Simple, Customizable Landing Page Builder for Any Campaign. Includes a domain selection field and a 'Start Building' button.
- IDX Squeeze Page:** Home Search Pages that Squeeze Traffic into Leads. Includes a domain selection field and a 'Start Building' button.

2. Nurturing a Cold Internet Lead into an Active Lead

- Use Smart Campaigns to build an automated lead nurturing system
- Examples of successful campaigns with little to no contact leading to a sale
- Set up long-term nurture campaigns to keep in touch with potential clients



The screenshot displays the exp REALTY kvCORE Library interface. The left sidebar contains navigation options: Dashboard, Playbooks, Smart CRM, Listings, Marketing, Lead Engine, Transactions, Web & IDX, Marketplace, Business Analytics, and Support & Training. The main content area shows the 'kvCORE Library' with a search bar and a table of campaigns. The table has columns for Campaign Name, Campaign Description, Starts When, Designed For, Channels, Touches, and an 'Add to My Library' button. The user 'Aaron Farrell' is logged in, and the interface includes a 'Shop Marketplace' button and a 'Quick Actions' dropdown.

Campaign Name	Campaign Description	Starts When	Designed For	Channels	Touches	Add to My Library
Buyer Nurture - 1 Year Campaign	A mix of mostly emails, with a few text messages designed to keep your name in front of longer term buyer prospects.	No start triggers defined	All	Email, Text	23	Add to My Library
Conversation Starter for Buyer Leads	7 Day Conversation Starting Campaign for Buyer Leads	Status New Lead	All	Task, Connect Call, Text, Email	9	Add to My Library
Default Active Buyer	System default for contacts whose status is Active.	Status Active Lead	Buyer	Task	29	Add to My Library
Default Active Renter	System default for renters whose status is Active.	Status Active Lead	Renter	Task	29	Add to My Library
Default Active Seller	System default for Sellers whose status is Active.	Status Active Lead	Seller	Task	29	Add to My Library
Default Campaign for Transfer Leads	System default for transferred leads.	Lead is transferred	All	Task	1	Add to My Library
Default Client Buyer	System default for contacts whose status is Client.	Status Client	Buyer	Task	29	Add to My Library
Default Client Renter	System default for renters whose status is Client.	Status Client	Renter	Task	29	Add to My Library
Default Client Seller	System default for seller contacts whose status is Client.	Status Client	Seller	Task	29	Add to My Library

3. Working an Active Lead

- Use Search Alerts to help find properties for clients
- Behavioral Alerts send messages automatically based on lead status
- Never worry about losing clients during busy seasons

The screenshot shows a real estate alert dashboard. At the top, there are navigation tabs: Timeline, Profile Details, Alerts (selected), Files, Transactions, and Tasks. Below the navigation, there are two alert cards: 'ALERT 1 View results' and 'ALERT 2 Not set up'. A toggle switch for 'Alert Active' is turned on. A summary box states: '28 properties mostly Single Family with 4 beds and 2.5 baths for around \$407,454.' A settings panel on the left includes an 'EDIT' button and lists filters: Areas: Map Selection, Listing Type(s): Single Family, Bedrooms: 3, Full Bathrooms: 2, Price Range: <450000, Keywords: 1, Options: 1+ Garage, Frequency: ASAP. The main area shows 'Around 35 Results' with a 'View All' link and buttons for 'Email Recent Results', 'Text Recent Results', and 'Copy Link'. A 'Recent Results' section displays six property cards, each with a photo, price, and details: 1. \$375,000, 6 beds, 3 baths, 0 half-baths, 7712 187 ST NW, Edmonton, AB, T5T5X2. 2. \$449,000, 3 beds, 2 baths, 2 half-baths, 3408 CAMERON HEIGHTS CV NW, Edmonton, AB, T6M0R5. 3. \$409,900, 5 beds, 3 baths, 1 half-bath, 18407 80 AV NW, Edmonton, AB, T5T1E8. 4. \$389,000, 5 beds, 2 baths, 0 half-baths. 5. \$424,888, 4 beds, 2 baths, 1 half-baths. 6. \$365,000, 3 beds, 2 baths, 1 half-baths.

Behavioral Alerts

Behavior alerts are automatic communications sent to your contacts when they perform specific behaviors on your site. These alerts drive engagement and help keep you top of mind with your clients. We do not recommend changing the default settings on behavioral alerts.

When a user performs the "Behavior" identified in the table below, we send them the text message for that behavior. If they do not have a phone number, we send them the e-mail. You can also be alerted to this user's behavior (turn on or off "Send agent alert"). Behavioral alerts can be turned off for individual clients on their profile page.

Contact Statuses

The screenshot shows a grid of contact status settings. Each status has a toggle switch and a colored indicator dot. The statuses and their settings are: Active Lead (toggle on, green dot), Client (toggle off, yellow dot), Closed (toggle off, orange dot), Contract (toggle off, black dot), New Lead (toggle on, blue dot), Prospect (toggle on, red dot), Sphere (toggle off, purple dot), and Archived (toggle off, grey dot).

4. Closing a Deal

- Automate follow-up emails using templates within kvCORE
- Schedule emails or texts to go out after a certain number of days for reminders
- Attach a lead to a listing and automate weekly email updates on activity

Edit Email Template

Template Scope
Aaron Farrell

Template Name
Closed AF - 3rd Email

Subject
Testimonial for my website

Content Advanced Editor

Paragraph **B** *I* [List Icons] [Code Icon] [Link Icon] [Settings Icon] [Help Icon]

[List Icons] System Font 12pt [Color Icon] [Table Icon]

Hi {first_name},

I'm working to update my website, and I'm collecting testimonials from my favorite clients. If you haven't already, would you mind sharing just a brief testimonial? [Google Review](#)

Thanks so much,

{agent_first_name}

Update Template Cancel

5. Nurturing a Closed Client for Repeat and Referral Business

- Set market updates for new community
- Program automated birthday and anniversary emails/texts
- Use hashtags to sort contacts and send newsletters, invitations to events, holiday wishes, etc.
- Track analytics in Business Analytics section of CRM

The screenshot shows a CRM contact profile form with the following sections:

- Cell Phone 2:** Cell Phone 2
- Home Phone:** Home Phone
- Work Phone:** Work Phone
- Address Label:** Address Label Line 1
- Primary Address:** Address, City, Province, Postal Code, Homeowner Status
- Unknown:** Registered Geolocation
- Call/Texting Options:** Auto Dial (Yes), Text (SMS) (Yes), Last Closed (YYYY-MM-DD), Send Anniversary Email/Text (toggle)
- Social Media:** Facebook, LinkedIn, YouTube, Twitter
- SqFt:** SqFt
- Valuation:** Address (Search for Location), Unit (Enter Unit (76, 2645B))
- 2nd Email:** 2nd Email, Fax, 2nd Address (2nd Address), Birthday (YYYY-MM-DD), Send Birthday Email/Text (toggle), Spouse Title, Spouse First Name, Spouse Last Name, Spouse Email, Spouse Phone, Spouse Birthday (YYYY-MM-DD)

Business Analytics: Pipeline



Conclusion

- With kvCORE, real estate agents can streamline their business processes
- Effectively generate and nurture leads, work active leads, close deals, and nurture closed clients for repeat and referral business



WANT THE CHEAT SHEET?

COFFEE TIME...



We will resume in 15 mins

Production Panel



Tom Allison



David Lam



Brittany Primeau



Live & Interactive “How-To” CMA



“Not Your Average Joe”

Joe
Tolvay

CMA Activity

- ★ Split into 4 Groups - Andy, Drew, Dan and David.
- ★ Each leader will ask each individual in the group what values are attributed to specific features.
- ★ What you believe that number should be, write on the post-it!
- ★ Together as a group you will arrive at what you think the house should sell for.
- ★ Come up with the value together!

Thank You to our Sponsors



Bryan Boyce - Pillar to Post



Moe Househ - Alberta Law Office



Jon Chin - JC Visuals - Videography/Photography/RMS



Dumitru Manic - Elledum Construction



Wilson Wong - Cutco Knives