# Automated Marketing and Service Strategies

**presented by a la mode**

a la mode
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## Course Highlights

- Learn a la mode's secrets for helping you market your appraisal services
- Meet XSellerate: your own, automated marketing department
- Use tons of pre-built e-mail and print campaigns
- Keep your name in front of your clients, with XSites and XSellerate

## Introduction to Automated Marketing and Service Strategies

Many appraisers think of marketing as an extra expense or a necessary evil. But the truly savvy appraiser knows that appropriate marketing techniques can smooth out the peaks and fill in the valleys of the usual business cycles. This course teaches you how to maximize your investment in marketing, not only to grow your business, but to maintain your current business levels during inevitable business fluctuations.

## Marketing 101

### Where's our industry headed?

**There's not just one "future." There will be two distinct and simultaneous paths:**

- Some (the majority) will stay as they are now, in a lender-centric business with a reactive approach, waiting for the phone to ring with orders they didn't "generate" in any way.
- Others will diversify, take control of income generation and markets served, using a proactive and professional approach to their business, with higher profits and satisfaction.

How (or if) you market yourself will determine which road you're on.

### Appraiser's perfect day!

**How does this sound?**

- Orders come in via fax and out via EDI (No clients call for status).
- Checks arrive or cash is left in an envelope at the inspection.
- No occupants present except when there's cash at the door.
- You go about your business with no distractions or human interaction.

***Hint:*** *This may sound like a great day, but it's not in line with a good marketing strategy.*

### What is marketing?

**Marketing isn't advertising…**

- Advertising reaps the crop; marketing fertilizes the soil.
- Imagine Mercedes and Hyundai come out with a new $100,000 luxury sedan. The cars are identical. Which would you be more inclined to buy?
- Just because results aren't immediate doesn't mean that marketing is just a bunch of "fluff!"
- Marketing is an ongoing process that is part of everything you do.
- The word "everything" is the key. Ever been to the ticket counter at an airline? Are they friendly, helpful or patient and do they even make eye contact with you? Ever have an impatient, rude flight attendant? What impression do you have right now? Did the 3 billion dollars that the airline spent in advertising make one iota of difference in your opinion? Probably not. Why? Because your experience in the ticket line and with your flight attendant is marketing every bit as much as the ads you see in magazines and on television.
- Remember that marketing is about impressions. That pays off over time. Every impression either adds to or detracts from your marketing.

### The basics of marketing

**Marketing starts with defining what you do:**

- Do you just provide a report with a number?
- Do you provide a professional service? What kind?
- Is what you "do" only a subset of your capabilities?
- Do you have a particular "niche"?
- Define three or four things that set you apart from your competition and insert that in everything you do as often as you can.

**Then, define your clients:**

- To what group of people are you marketing?
- Who decides to use your services?
- Are there different types of clients?
- For each kind of client, what are they looking for in a solution? What hits their “hot buttons”?

**Then, define your competitors:**

- Who or what is your competition? (From your clients’ perspective, not yours. They have to choose a service, so what sets you apart?)
- How does your competition beat you and how do you win, for specific clients and products/services?
- a la mode compared to other Software – For years some vendors have touted: “We’re simple.” They marketed to the niche of people that want forms, a sketch and a map and that’s it. WinTOTAL, in contrast, is the Swiss Army knife of appraisal software. We say: “Here are ALL the tools you need.”

## Differentiation defines you

**Regardless of what you do or sell, how is it demonstrably different from the competition?**

- Use your own “Principle of Substitution” knowledge – would someone pay more for your service than someone else’s if there’s no difference? (Recall the $100,000 Hyundai)
- Make a candid “comps grid” of your services.

**Differentiation is the single biggest issue confronting appraisers today.**

- Differentiation vs. AMCs,
- Differentiation vs. AVMs,
- Differentiation vs. AVMs + inspections,
- Differentiation vs. other appraisers,
- Differentiation vs. REALTORS® doing BPOs
- Your level of differentiation defines your profit.
- Be specific - “The only,” “the first,” “the largest,” etc.

## Differentiation and added value

**Decide where you add value, and differentiate on those items.**

- Differentiating on irrelevant items wastes “marketing bandwidth” – your customer only has a limited amount of time and effort they can spend on listening.
- What are those core things you always want to impress on your clients? If you’ve got 15 seconds with a client, what do you want them to remember?
- Don’t assume the client knows where you add value or differentiate from others – they may not. If you don’t tell them, they won’t know.
- Examples of differentiation: Technology, Mobility, Communication, Service, Speed, Experience

**What would it take for them to switch to a competitor?**

- Ask them – it will tell you where you add value now and differentiate in their minds, and where you don’t.

## Define clients and their needs

**What do lender / broker clients want?**

- Low hassle (i.e. “service”) in all areas: From ordering to payment to even finding your services.
- Fast turnaround, and quality.

**What do consumers want?**

- To know what their “nest egg” is worth and what they can sell it for. Unfamiliar with process and may need to even know the value of your services.

# Automated Marketing and Service Strategies



**What do other non-traditional clients want?**

- Varies. Different than lenders / brokers. Often interested in niches and specialties.

## Differentiate your service level

- In general, poor service is the reason most people leave a vendor or service provider.
- Think of the best customer service you've ever received. Do you provide that level of service?
- Ever had a bad day? Does your client care? What impression did you leave?
- You are your own customer service department!
- Be a "secret shopper" and call to see how your staff treats customers and prospects. (We do that all the time, and we also call our competition.)
- Invest in customer service and phone training courses and books.

## Characteristics of good service

**Responsiveness**

- Don't take all day to get back in touch.
- Always answer the phone when it rings. Don't treat phone calls like interruptions.

**Proactive status**

- Good news or bad, we all feel more comfortable when we know what's up.

**Politeness**

- Follow the golden rule even when others don't.

**Respect**

- Don't expect others to always understand your processes or follow instructions.

## Differentiate your technology

- Your clients don't know if you don't tell them. Technology adds credibility.
- Banks are far behind appraisers – be "leaders" to them, not "led by them."
- Send newsletters to clients letting them know you invest in technology.
- Never buy any new technology without telling your clients what it is and how it affects what you offer them.
- Tell your clients why you know the technology best. If you don't, someone else with other interests will.
- Remember clients that wouldn't take digital photos, digital signatures or PDFs? Someone probably told them early on those weren't good technologies!
- Hold face-to-face seminars with your clients to show them tools like online ordering.
- Show them how to do EDI reports, but deliver donuts so they remember your face.
- In this high-tech world, remember most of your clients are "in sales" and value personal interaction.

## Why should you do this?

In today's market, you may already feel overwhelmed with business, but there are other benefits to ongoing marketing efforts.

- Respect means you don't have to worry about being "only as good as your last appraisal."
- New clients approach you regularly because they saw your materials or were referred from an existing client.
- Less dependency on a few key clients and protection in case you lose a client (beyond your control, of course).

- Spend more time appraising and less time hassling.
- Clients will go out of their way to use you.

## New mindset makes it work

**Switch your mindset – you must learn to think like a salesperson**

- Have you thought about offering discounts and bundles, and going for a "close"?
- Think like your target or actual client, and what motivates them to "buy" (and it's not easy).
- If you don't want to think like a salesperson, hire someone who will and give them a clear plan.

## Mindset: Expense vs. Investment

**"Expense" mindset will make it solely an expense – no aggressiveness.**

- Use technology like capital – leverage it for additional income.
- Don't "cut back" on things that will help you make money (i.e. technology, marketing, advertising). Figure out how you'll make more money and profit.

**Think about new applications and workflow constantly.**

- Small individual gains of a minute here and a minute there add up .

Take time to "sharpen the saw" so you don't get behind. Attending this convention is a great start!

## Mindset: Have a marketing budget

Set it up as a percentage of sales and as a flat dollar amount and use the larger of the two.

- Must be significant enough to make a difference (5 to 10 percent of total gross revenue).
- Gauge it by how many extra appraisals (or other products) you'd have to sell to break even.

Spend when things slow down, not the opposite.

- You can do well without marketing when things are booming (though we don't recommend it).
- When things turn down, you have to create income, not wait for it to magically drop in.
- Resist the urge to "hunker down."
- You're either growing your business or killing it – the middle ground called "stable" is a myth.

## Mindset: Do some "networking"

- It's easy to be an island and forget there are other people out there solving the same problems you do every day.
- Form relationships with other real estate professionals to attract referrals.
- Appraisers across the nation communicate on the WinTOTAL Forum. It is absolutely free. There are well over 1,000 members of the group. Some people post daily, while others simply "lurk."

***Hint:*** *http://groups.yahoo.com/group/Total2000UsersGroup/*

## Mindset: Prepare for growth

- **Outsource**. Don't ever turn down a job because you are "too busy." That leads that client to another appraiser – they may not even consider you next time!
- Remember: Fear the customer that makes up over 25 percent of your business. What would happen if you lost them?
- Anticipate new clients and have a plan to deal with them before they actually arrive.
- Suddenly, you HAVE landed the biggest lender in town! What will you do now?

# Automated Marketing and Service Strategies



## Reap the benefits with advertising

**There are many ways to reap the benefits of the marketing:**

- Ads, newsletters, press releases, speaking engagements.
- XSellerate campaigns give you a head start.

**Any differentiation you keep quiet is irrelevant.**

- Make sure your ads, voice mail, fax cover sheets, website, etc. all repeat your differentiators.
- Think about agents. Every time you turn around you see "#1 in Tuscaloosa." They spray that everywhere and it sticks, even to the point of being comical.

## Run ads over and over and over

**Repetition is the key to new markets and processes:**

- Seven to 10 ads to the same people to get a response at all.
- Look at our software marketing as an example – grew to largest with 0.5 percent response per mailer.
- Most people would have quit if 99.5 percent of their mailers got no response – but we built a large, highly profitable business off it through repetition.
- Do it daily, or weekly, monthly – all the time.
- Use the XSellerate campaigns to automate it.

**Military analogy – concentrated massed efforts:**

- Don't spread yourself thin.
- Pick a few media and hit one or two points – your differentiators – and ignore the peripheral issues.
- Penetrate the market on those issues and then exploit the breakthrough with even more marketing.

## Retention vs. new client processes

**Ad campaigns can either get new clients or retain (and expand) existing clients.**

- Do both for the best balance because someone else is marketing to your clients if you aren't.

**Individual versus en masse:**

- Both methods are useful in either retention or creation.
- Follow up on calls or e-mails after an appraisal is delivered to see if clients are happy.
- Send mass campaigns to every loan officer, mortgage broker, REALTOR®, real estate attorney, divorce attorney, financial analyst, etc. in your market.
- Individual calls and letters to FSBOs and other consumer-level clients.
- Mass notices to all clients when services are added or improved (press releases, letters, etc.).

## Traditional media options

**Newspapers and magazines:**

- Newspapers love press releases - and they're free.
- Ads in the newspaper's Saturday real estate magazine insert are the least expensive and very effective.
- Newsletters (yours or others' such as neighborhood associations, REALTORS®, MLS/board, etc.)
- Neighborhood/suburb magazines (upscale usually).

**Direct mail:**

- Postcards, letters, brochures to REALTORS®, FSBOs, attorneys, lenders, etc.
- Purchase lists from companies like InfoUSA.com.

# Automated Marketing and Service Strategies



**Phone:**

- Call others' ads (FSBO, REALTOR®), introduce yourself and offer a "special" to get an order.

## Internet and other media options

**Websites:**

- Your website should be listed on every business website in town – the chamber, REALTORS®, mortgage brokers, newspaper sites, FSBO sites, etc.
- Buying real estate keywords on major search engines is generally not very effective.

**E-mail techniques:**

- It's easy to personalize and do both en masse and based on triggers (i.e., two weeks after an order).
- Two more things XSellerate can automate for you.

**Miscellaneous**:

- Your answering machine and voice mail messages – what do they say that creates income?
- Billboards, Park benches, Bus, Movie theaters, Yellow Pages, Little league jerseys, airplane streamers at the ball game

## Telephone advertising

Still one of the most cost-effective methods, especially locally, where calls are free.

**Can be individual or en masse:**

- Follow up on calls to existing clients after every order.
- Status calls are a great opportunity to ask for more business.
- Mass calls to any list to notify of new solutions/specials.
- General average in this industry is that you have to make four to five calls to reach the target person.
- Hire someone to make calls for you because you'll probably avoid making the calls. The "Do Not Call" laws don't apply to people with whom you already have a business relationship.

## Summary

- You're probably not as differentiated as you think right now, which means there's great opportunity to do so.
- AVMs are competitors only in less-profitable, less-differentiable segments – get out of them, or, at least, become less dependent.
- Remember that many marketing efforts will take some money but it is a long overdue expense that will only help your business.
- Technology's role is no longer cost-cutting; rather, it's an opportunity creation and client retention tool,
- WinTOTAL, XSites and XSellerate team to provide just such a tool.

## What is XSellerate and what can it do for you?

- Tool designed to help you sell and resell your services to new and existing clients.
- Consists of pre-made e-mail and print marketing and allows you to create or customize your own pieces.
- Can be set to automate much of your ongoing marketing:

  "Set it and forget it!"
- Marketing aids to help answer marketing questions and provide marketing and advertising strategies.

## Creating XSellerate Campaigns

### XSellerate Basics

XSellerate utilizes the contacts and leads generated from your XSite or from other sources, as well as your personal contact database. Marketing pieces – called "Ads" in XSellerate – are then sent to these contacts, as either parts of a long-term campaign or as a "one-time" message. Campaigns can be:

**One-time messages** – Often used to send particular messages based on a one-time event, such as signing up a new client.

**Drip or multi-contact campaigns** – Used to deliver consistent, multiple impressions to your contacts on a schedule, increasing awareness of your services and business.

**E-mail** – Messages sent through e-mail as part of an ongoing business relationship with customers can be a very effective communication method. As long as you avoid "spamming" techniques, e-mail marketing is often welcomed by customers.

**Print** – While e-mail marketing is inexpensive, there's no substitute for putting traditional eye-catching marketing in front of your customers through direct mail.

Effective marketing programs use a combination of these types of communications to effectively reach contacts on a regular basis. Here's a simple primer on building your marketing plan to utilize XSellerate.

## Contact Management

Before you begin creating XSellerate campaigns, you need to get your Contacts database in order. Your complete address book can be stored online with your XSite. Like the rest of your site, all you need is a browser to access it. Using the Contacts database is easy and intuitive, due to features like storing company information, so it doesn't have to be retyped for each contact, and grouping contacts into categories which you define.

- From the **My Office** screen in your XSite, click **Contacts** to access your contacts database.

### Adding / Editing Companies and Contacts

Having an address book naturally keeps you from having to retype e-mail addresses. Plus, the contacts you add to your database integrate with other products and features that rely on an address book, such as WinTOTAL Aurora's Orders PowerView, CertMail and XSellerate. A little later, we'll discuss importing them from applications such as Outlook – for now we'll add a contact manually.

#### Companies

Included in your XSite is a comprehensive contact management database. The advantage to using this tool is that any customer or visitor who uses your site is automatically added to your contacts list. Now you can also add company contacts to your database.

To add a company:

1. From the **My Office** page, click **Contacts**.
2. In the **My Contacts** screen, click **Add**, then choose **Add Company**.

3. Choose a company type by checking the appropriate box and then indicate whether you want to make this company contact available to all your XSite users or just for yourself by marking the **Public company** check box accordingly.

4. Complete the information in the desired fields, then click **Save**.

## Contacts

To create a new contact in your database:

1. From the **My Office** page, click the **Contacts** icon.

2. In the **My Contacts** screen, click **Add**, then choose **Add Contact**.

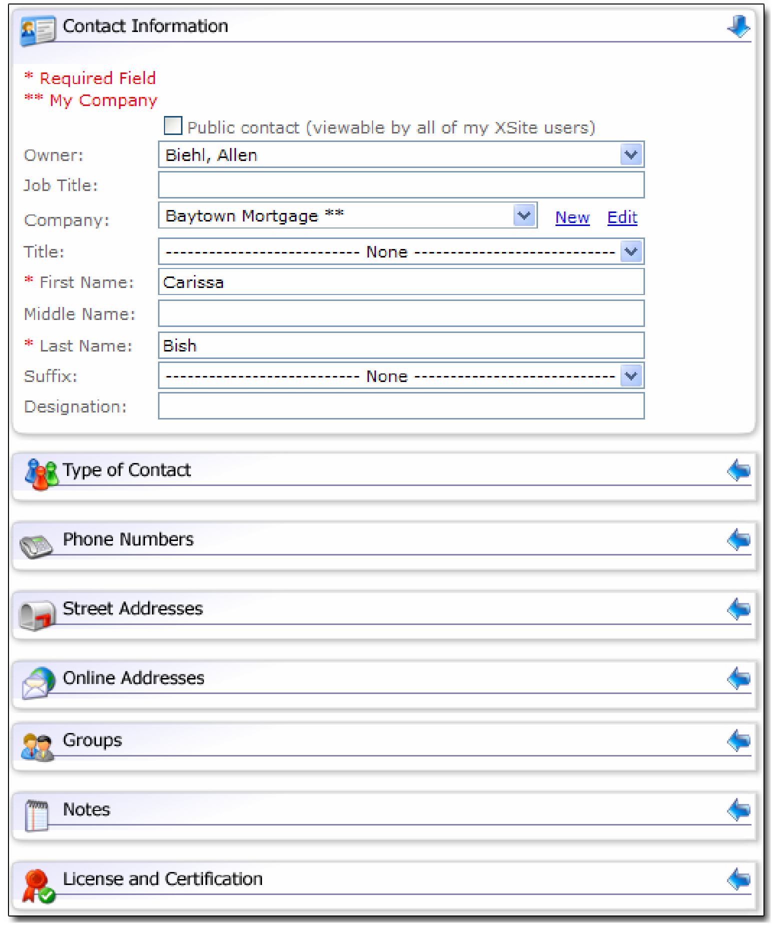
3. Complete the information in the desired fields and click **Save**.

**Contact Information** – The first section of your contact data includes all the basic name, title and company information. The **Company:** field allows you to quickly select the name of the company for which your contact works. This saves you from having to retype the same information when several contacts work for the same firm. When you select a company name from the list, the contact's business address information is pulled into the record automatically. If no company name is selected, then the business address fields in the **Street Addresses** section are not displayed.

***Hint:*** *If you need to add a company name on the fly, just click the* ***New*** *link next to the Company field.*

**Type of Contact** – Since the Contacts database is designed for real estate, we've set up predefined categories for each contact. These help you when searching for specific contacts later. Make sure you check the box next to all of the categories which apply to this contact.

**Phone Numbers** – Entering complete phone numbers here allows you to quickly dial a contact from your internet-enabled mobile device when you access your Mobile XSite.




**Street Addresses** – If you chose a company name in the **Contact Information** section, the business address information for that company is displayed here. You can also enter a personal or home address for this contact.

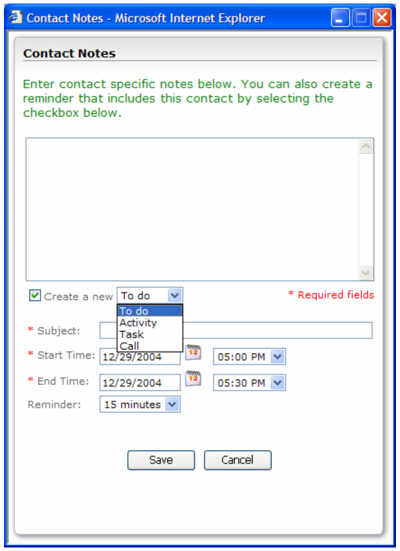
**Online Addresses** – Each contact can have up to 3 e-mail addresses. The one you mark as primary is used as the default when composing e-mail.

**Groups** - In addition to the pre-defined **Type of Contact** items, you can also place your contacts into "groups" you define yourself. To add a new group, just click the **Add** link, type the name of the group and click **Save**.

***Note**: Groups don't have to be by "occupation." You can use groups to denote new contacts, trainees, hot prospects, or whatever. These will be vital to your future marketing efforts. Take some time to strategically set up groups so you can easily market to them.*

Click the check box next to all of the groups that apply to this contact. Manage your existing groups by clicking the **Manage Groups** link. View all your existing groups or create new ones as needed by clicking **New**, typing in the name of the group and clicking **Save**. Once you have your groups created, click **Close**.

**Notes** – Once you've created and saved a contact, you're able to create notes for that contact. Notes can be any data you wish to remember that doesn't fit readily into any of the standard fields. Birthday, favorite donut flavor, spouse's names, you name it.




In addition, you can use the Notes field to create a "reminder" so you don't forget to do something for this contact. Click the **Add** link to begin adding your information. At the bottom of the screen, click the **Create a new…** check box, then select an item type from the drop-down menu.

Enter a subject, start time and ending time for this task. Then, select how far in advance of the event you want to be notified and click **Save**. When your event nears, you'll receive a reminder notification at your primary online address.

### Group Management

Go to your **Contacts** main screen and choose a group from the **Filters** drop down menu. Once you choose a group you'll see only the contacts in that group, and can add or delete them as necessary.

1. To add one or more contacts to a group, go to the **Contacts** main screen and check the boxes next to each individual that you'd like to add.
2. Click Tools, then Edit Contacts
3. Check the box for the groups or contact types you'd like to add these contacts to, and click **Save**.

## The Campaign Lifecycle

### Stage 1: Organizing your Contacts

An integral part of your Campaign Lifecycle is the Contacts database. To begin planning your campaigns, first decide which groups of contacts you'll be targeting. The more you can organize your contacts into strategic groups, the easier it'll be to work with them later in your marketing plan. You can send campaigns to individuals, but making them part of a group and an automated campaign is more effective.

### Automatically adding new contacts into existing e-mail campaigns

We've automated the e-mail campaign enrollment process so that you can add your new contacts to your existing campaigns without the hassle of editing the campaign and manually adding the contacts individually. Instead, whenever you add a contact to a Group that is being targeted by an XSellerate campaign, they automatically start receiving that same campaign. You can just sit back and let XSellerate do the work for you.

In addition, if you use your XSite's **Client Data Capture Forms**, whenever a site visitor completes one of your forms, they can be

# Automated Marketing and Service Strategies



automatically added to a specific group. Again, if that group is targeted by an XSellerate campaign, they'll start getting the e-mail messages.

To take advantage of automatic e-mail campaign enrollment:

1. First create a group for the new contacts using the steps described above.
2. Next, from the **My Office** screen, click **XSites Wizard**.
3. In the **Content** menu pane on the left, click **My Content**.
4. From any of the **Content** tabs, click the name of the document to which you wish to add a lead generation form.
5. Scroll down the page **Editing** window to view the **Other Content Options** area.
6. Click the check box for **Client Data Capture Form**, then click **Customize**.
7. Select one of the **Client Data Capture Forms** from the list, or click **Create a form** to build a new one. Then click **Submit**.

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***Note**: Creating new Client Data Capture Forms is a snap. For an overview of the step-by-step process, consider taking the "How to Build a More Effective XSite" course presented at this convention.*

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8. Finally, from the drop-down menu, **Select the Contact Group** to which you'd like people who use this form added.

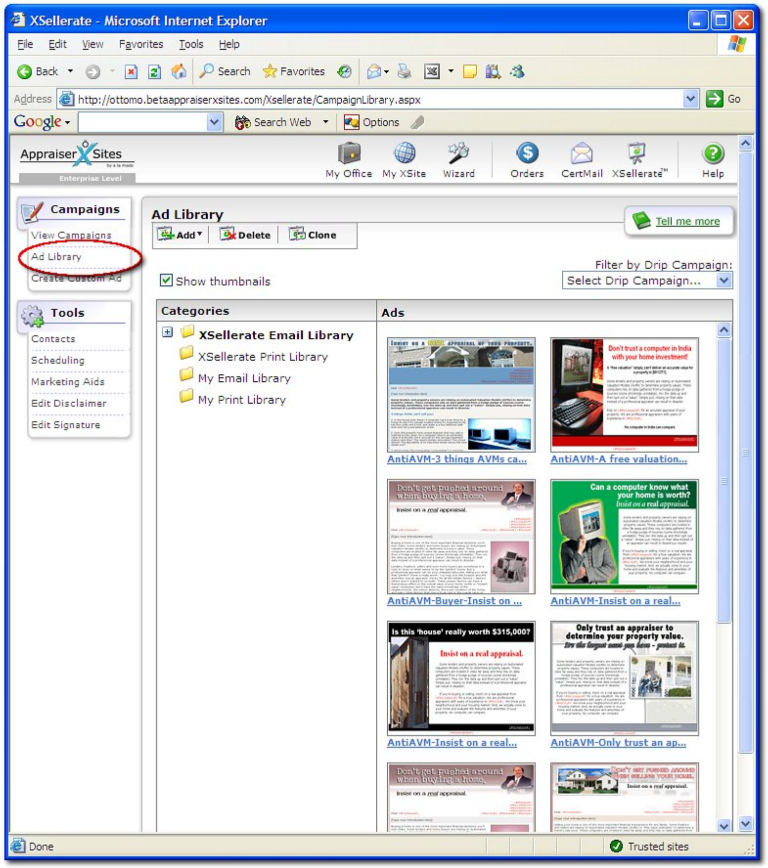
## Stage 2: Planning your Campaigns

Before you get started using XSellerate, you should spend some time planning your marketing efforts. Effective marketing is not a haphazard affair. It takes careful planning, efficient execution and regular follow up. The more effort you put into the planning stages, the higher the payoff in new and repeat business.

- To begin, click the **XSellerate** icon from the **My Office** screen.

### XSellerate's Ad Library

A great way to plan your marketing campaigns is to surf through the extensive list of pre-built marketing pieces included within XSellerate. To make that task a painless process we've built our **Ad Library** to show thumbnail ad previews so you can easily choose what to include in your campaign. To take advantage of XSellerate's **Ad Library**, simply click the **Ad Library** button in the **Campaigns** menu pane on the left.



Once the **Ad Library** appears, you can browse through the list of E-mail and Print ads by simply clicking on the **Category** that fits your needs. Browse through the thumbnail ads to the right of the **Category** list.

In the **Ad Library** you can:

**Manage e-Mail ads**

- View the full page ad by simply clicking the thumbnail.
- Edit the ad by clicking the thumbnail and then clicking **Edit** when the full page preview appears.
- Print the ad by clicking the thumbnail and then clicking **Print** when the full page preview appears.
- Create your own custom e-mail ad category by clicking **Add,** then **Custom category**.
- Filter the ads shown by the pre-built **Drip Campaigns** they make up using the drop-down menu in the upper right.

**Manage Print ads**

- View the full page ad by simply clicking the thumbnail.
- Edit the ad by clicking the thumbnail and then using Adobe Acrobat to modify the ad.
- Print the ad by choosing **File**, **Print** from Acrobat's window when the full page preview appears.
- Create your own custom print ad category by clicking **Add,** then **Custom category.**
- Upload your own Print ad by clicking **Add,** then **Upload Print Campaign**.

***Note**: If you're new to the whole concept of marketing, or you need a refresher course for the things you learned in your freshman marketing class, take a look at the **Marketing Aids** section of XSellerate. There are several articles and guides there designed to give you a hand.*

## Stage 3: Creating and Executing your Campaigns

Once the ads are created or selected, it's time to start building the actual campaigns. Creating an e-mail campaign is a simple three-step process:

1. Select the recipients or groups.
2. Enter the ads that make up the campaign and designate when they should be sent.
3. Start the campaign.

Campaigns can be a single marketing piece or a series of marketing pieces on a schedule, which are delivered by e-mail or print. E-mail or print campaigns can be an extremely effective way to:

- Keep you on the minds of your clients so they remember to order from you in the future.
- Educate clients on industry topics.
- Make a good impression with prospects.

## Stage 4: Care and Maintenance

After you've created your campaigns, the work is not over. You need to ensure that your campaigns are kept up to date. You may need to reuse an old campaign, update the ads that are included, change the groups that receive the campaign or even add new campaigns as your marketing strategy changes. XSellerate makes it easy to keep up with your marketing efforts to ensure you're getting the most bang for your buck.

# Building Campaigns

## Print Campaigns

Go to the **Ad Library** and select which print campaign ad(s) you wish to use, modify if needed and then decide how you're going to have it printed, labeled and mailed. You can use your XSite's **Contacts** function to generate a set of labels for any group. There are also numerous mail service companies throughout the country that are set up to help with this function like FedEx Kinko's. Most of them will accept a PDF file, such as an XSellerate Ad, and combine it with a list of contact names.

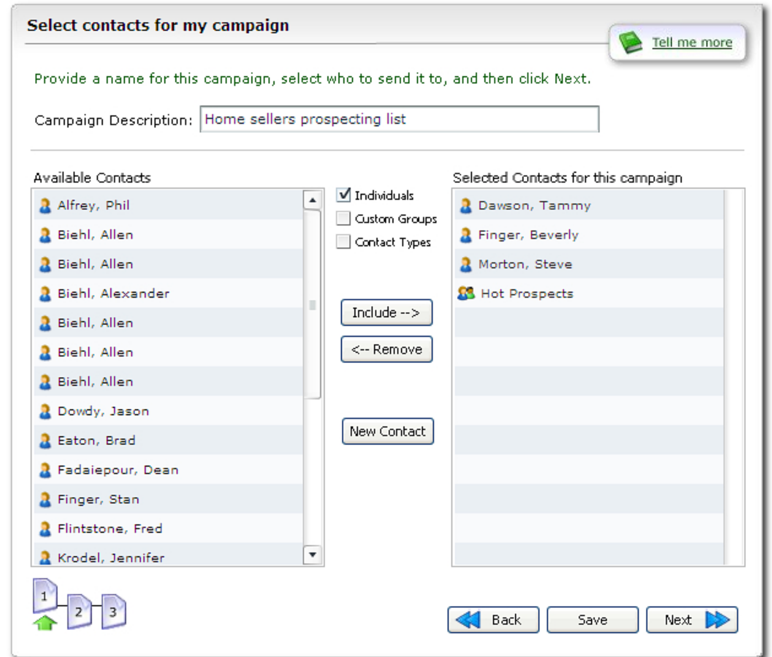
***Note:*** *If you're going to have a third party print these pieces, they'll need a list of your contacts with addresses. You can produce these from the Contact Manager by exporting your groups to a .CSV file.*

## E-mail Campaigns

Click **View Campaigns**. You'll see a list of e-mail campaigns you've already created, if any. If this is your first time in XSellerate, your list will be blank.


### Three steps to creating a campaign

**Step 1:** Click the **Add New Campaign** button and enter the description for this campaign in the text box. Make sure you use something descriptive for the subject of the campaign, and possibly the recipients as well so that you can identify them easily later. This will make it easier to manage the campaigns or reuse them in the future.




Now, select the contacts that are to receive this campaign.

1. In the center of the screen are three check boxes. Click each one to display the **Individuals**, **Groups** or **Contact Types** in the **Available Contacts** list on the left.

***Note****: Only those contacts with an e-mail address entered will show up in the list.*

2. To include an individual contact or group in your campaign, select it in the left window, then click the **Include** button. Your contact appears in the **Selected Contact for this Campaign** window on the right. Continue adding individuals or groups using this same process.

3. If you want to add a contact that is not yet in your contacts database, click the **New Contact** button. Type relevant information

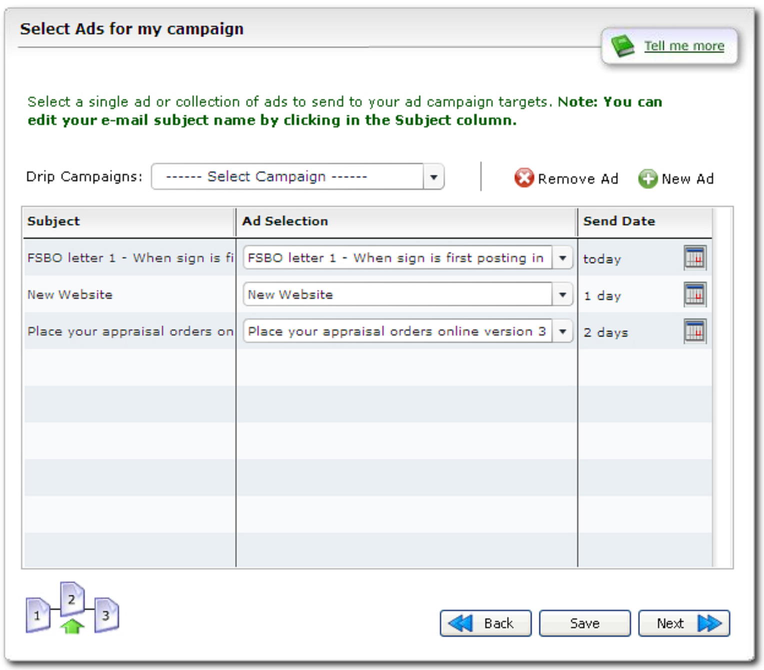
and click **Save**. This new contact will be added to the current campaign, and also added to your contacts database.

4. Click **Next** when you're ready to move on.

**Step 2:** Now you're ready to start inserting the ads that make up this campaign. There are two types of campaigns available in XSellerate:

- **One-time campaigns**. These send out only one ad to your contact.
- **"Drip" campaigns**. These send out a series of ads on a schedule.
- **Recurring campaigns**. These send out 1 ad on a recurring basis. You can use these to send a "Merry Christmas" ad to your lenders each Christmas, for instance.

To begin inserting ads into your new campaign, you can either add them individually or select from one of the pre-designed campaigns included in XSellerate.




1. To use an XSellerate stock drip campaign, select it from the **Campaign Library** drop-down list.
2. To add your own ads for a one time or drip campaign, click the **New Ad** button.
3. A default ad is placed in the list. Click the drop-down box in the **Ad Selection** column to view a list of available ads. Scroll through the list to select the ads that you have planned for this campaign.
4. In the **Subject** column, the title of the ad is included as the subject line that will accompany the e-mail when the campaign is sent.

***Note:** You should edit this text by clicking on the text and typing the subject you would prefer. Remember that this is the first item your recipients are going to see, so make sure you use a subject that will encourage them to open and read your message.*

5. Finally, you need to select when this ad is going to be sent. Click the drop-down box in the **Send Date** column and select the appropriate date from the calendar.

When you've added all of the desired ads to the list, click **Next** to continue.

**Step 3:** The final step in the process is to review your campaign and send it. The **Campaign setup summary** screen lists the relevant information about this campaign, including what type it is, which ads are being used and which contacts will be included in the mailing.

If your campaign is a one-time event, click the **Send** button to execute the campaign and send the ad to everyone designated. If it is a drip campaign, you would click the **Start** button to indicate that everything is correct. The e-mails will be sent when the first date in your campaign is reached.

## Creating, editing and reusing e-mail Campaigns

Once you've created a campaign, you can fine tune it at any time by editing any of the settings you selected earlier.

# Automated Marketing and Service Strategies



1. From the **View Campaigns** window, find the campaign you wish to modify and click the **View/Edit** link in the **Campaign Options** column.
2. Now, follow the same steps you used to set up the campaign. You can change the contacts to whom you are sending the campaign, edit the ads included or change the delivery dates.
3. When you're done editing, in **Step 3** click the **Send** or **Confirm** button to implement your modified campaign.

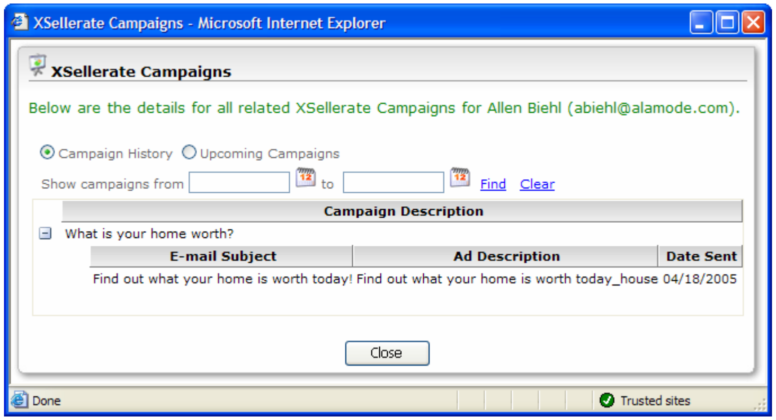
In addition to editing an old campaign, you may want to reuse it as the basis for a new campaign.

1. Find the campaign you wish to copy and click the **Clone** link in the **Campaign Options** column.
2. A copy of your campaign is created in the list. Click the **View/Edit** link for that campaign, give it a new name and continue with the editing process described above.

Two other options are available to work with your campaigns:

- To remove a campaign from your toolkit, simply click the **Delete** link. This will get rid of the campaign, but the ads used in the campaign are unaffected.
- To view the progress and status of one of your campaigns, click the **History** link. This will display the current status of each ad in your campaign, including to whom they've been sent. Each ad is listed with either a denoting that everything was sent properly or a indicating that an error occurred with some facet of that ad. A description of the error is included to help you correct the problem. Clear the history for any campaign by clicking the **Clear History** button.

Your XSite's Contacts database also has an area to check campaign history by contact. Go to **Contacts,** select and edit the contact that you have a question about, then click on the XSellerate icon in the toolbar to view all of the campaigns that his contact has been associated to in the past or are scheduled to receive in the future.

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