

Marketing Calendars for Listing Presentations

SalesPartner Marketing Calendars are designed to be shown to potential vendors at listing presentations/appraisals. The purpose of the marketing calendar is to illustrate the services that you provide your vendors and the techniques you use to get the best net price for their property.

In SalesPartner, we create Marketing Calendars by first attaching to the Z-Listing an activity template including what you do to sell a property, then we print this as a Calendar Report.

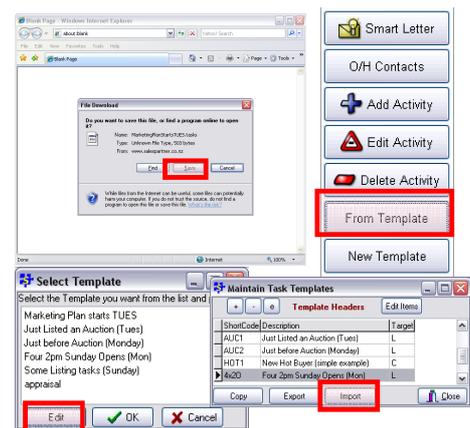
After printing the report, the Activity can be deleted. (Keeping this activity attached to the Z-Listing is unnecessary, if you don't get the listing, it is irrelevant and if you do get the listing, you will want all activity to be on the real listing record with a reference code given by your office).

Step 1: Downloading and Importing the Sample Template

We have created a sample template which you can download into your copy of SalesPartner and then edit its contents to suit you. Open your web-browser, you can download this template from:

<http://www.salespartner.co.nz/MarketingPlanStartsTUES.tasks>

Save this file to your My Documents folder on your hard drive. Lookup a Listing or Z-Listing, and go to the activity tab, Click on From Template, Edit, then Import and lookup **MarketingPlanStartsTues.tasks** in My Documents. Now our Sample template is on your copy of SalesPartner and you are ready to edit it and use it to print Marketing Calendars.



A Brief Explanation of the SalesPartner Sample Marketing Calendar Template

By now you have downloaded and imported the SalesPartner Sample Marketing Calendar Template into your copy of SalesPartner. Here is a short overview of some of the activities present in our sample. In the next section we will show you how to edit the template to suit you.

Start Date Tuesday - The Start Date is important to adhere to as it sets the Open Homes to be on Sundays. No matter which day of the week you give the listing presentation, when you use this activity template you must set the Start Date to the following Tuesday, then afterwards, you can edit the first couple of Activities to be on the correct days. This will become more obvious later.

Publish on internet - You may wish to expand this to be more specific by including the names of the sites which the property will be uploaded to such as TradeMe or realestate.co.nz and you may also wish to include that the property will be uploaded and sent out to your database on your weblink.

Preview Invitations to Database - We recommend that you hold buyers previews for your listings before you commit to a tender/auction/priced strategy for the property. The preview will give you a good indication of the amount of activity you can expect from buyers regarding this property and can be a key indicator for choosing a pricing strategy for the property.

3-3-5 review meeting - This is an idea that we'd encourage you to use with your vendors. After:

3 Adverts: 2 weekly adverts published and the 3rd one is booked, or

3 Open Homes: One preview and 2 open homes, or

5 Visits: 5 qualified buyers have visited the listing,

This is a good time to discuss with your vendors the current interest in the property. If you do not now have a workable offer, or interest that you can negotiate with, you should use the **3-3-5 review meeting** with the vendors and discuss the promotion, presentation and pricing of the property.

Step 2: Loading the template onto a Prospect Listing and printing the Marketing Calendar

Lookup a Z-Listing that you would like to produce a marketing calendar for. Go to the **Activity** tab of the property and click on **From Template** [A] (on the right hand side).

Select the template (ie MarketingPlan-StartsTues) [B] and click OK.

In the **Task Templater** window, set the **StartFrom** date [C] to the following Tuesday (ensures that the open homes are on Sundays). Then click OK.

Now you have imported all this activity into the new property, you can edit the first few activities such as 'listing confirmed' to be on the correct dates.

Now you can go to reports [D], go to the Listing Activity Tab [E], click on the Calendar [F] and Print the report.

Step 3: Editing the Template

To edit the template marketing plan, first load the template in one of your listings as in Step 2. Then add, delete or edit any activities you require. After that, you can save this list of Activities as a new template.

To make this a template, go to New Template. Here you can highlight all the activity that you've just created to put it into the template for future use. You need to enter a **Short Code** and a **Description** before pressing OK.