BoldTrail

THE 10 X 10
METHOD

Gathering and organizing your Sphere of Influence is the foundation of a Real Estate database. Use the 10x10 Method Workbook for a fun and easy way to add contacts to your BoldTrail CRM!

Pro Tip: Use this workbook along with the *Gather Your Sphere Playbook* in BoldTrail to gather, organize and upload your targeted audiences within your Sphere of Influence (aka: SOI)

Inside Real Estate

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What is the 10 X 10 Method?

Starting your database doesn't have to be complicated. We've created this 10 X 10 method to help you create targeted audiences you can start engaging with once they are imported into BoldTrail. It's just a few simple steps:

⬇ DOWNLOAD

1. Click the "DOWNLOAD" button above to make a copy of the sheet you'll use to create your database and upload into BoldTrail.
2. Add different categories in the blank column B of the spreadsheet based on "How do I know you?" (hint: you only need 10 categories to generate 100 contacts!)
3. Next, using a handy timer or stopwatch, set a time limit for 2–5 minutes and in that time, focus on one category and start adding names into your spreadsheet. When the timer goes off, move to the next category and repeat. You'll be surprised with how many people you know!
4. Once you've completed all 10 categories, start filling in as much of the contact information details and get them ready to import into BoldTrail!

QUICK TIPS

Use this 10 X 10 along with the **Gather Your Sphere Playbook** in BoldTrail's Playbooks to gather, organize and upload your targeted audiences within your SOI

✦ Learning

The Top 6 Categories to Get Started Creating Your Real Estate Database

1. Homeownership Status
- Have owned their home for 7+ years
- Rent a home
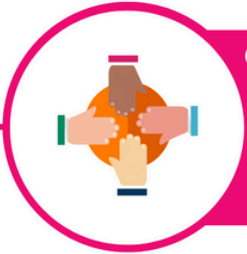- Own a home in my neighborhood
- Rent a home in my neighborhood

2. Friends & Family
- Your immediate Family
- Your best friends
- People on your Holiday Card List
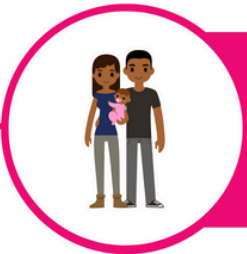- Friends of your immediate family
- All their friends!

3. Community Connections
- Neighbors on my street, in my complex, in my zip code, etc.
- Friends from Church
- Small Business Owners, Vendors, etc.
- PTA, School Staff you know

4. People with New Life Events
- Just Married
- Newly Divorced
- Empty Nesters
- Just had a Baby / Growing Families

5. Careers & Education
- People I know from High School/College
- Current Coworkers
- Former Coworkers
- Professionals I know (Dentists, Doctors, Teachers, Lawyers,

6. Let's Get Social!
- Facebook Friends
- LinkedIn Connections
- Instagram Followers
- Other Social Media Connections

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SAMPLE 10X10 Spreadsheet

1. Create your Category based on "how do I KNOW YOU?"

2. Set that timer and think of 10 people for each category and start by adding with their FIRST & LAST name.

3. After you've done this 10 times you have the beginning of a new database! Next, go back and add as many contact information details as you have or can dig up! And while there are over 70 data points you can use to bring information into BoldTrail, it's ok to start with just the main ones too!
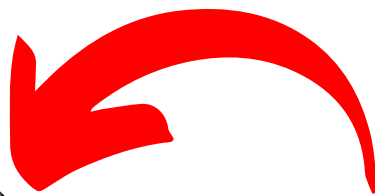
When your spreadsheet is complete, you are ready to import into BodlTrail!

Learning

Import Your Leads to Maximize Impact!

	A	B	C	D	E	F	G	H
1	first_name	last_name	email	cell_phone_1	Status	deal_type	hashtag	source
2	Kerry	Oki	kokigirl@gmail.c	415.555.9632	Sphere	seller	family|homeowner	Lead Import
3	Shaquille	Oatmeal	shaqattack@me	415-555-5213	Closed	buyer|seller	church|local	Zillow
4	Iona	Hows	how75@hotmail	4155556318	Active Lead	buyer	justbrowsing|zip97219	Google PPC

Uploading a correct First and Last Name makes BoldTrail automation seamless when using merge tags to personalize lead communication

Email is the primary method for lead communication. While you can import without it, it's a MUST HAVE in BoldTrail if you want deliverability of Search Alerts, Valuations, Market Reports and Campaigns.

A **Cell Phone Number** powers the texting features of BoldTrail. It's the most efficient form of communication, because leads respond to texts at a higher rate than emails.

Status is the #1 Identifier in BoldTrail. It's a major component for triggering communication and behavioral automation.

Deal Type is an equally important identifier in BoldTrail to ensure that appropriate types communication are going to the right types of leads.

A **Hashtag** is a personalized label that you can use to bucket your leads into as many groups as you want. This allows you to sort, search, and trigger automations.

Use **Source** to keep track of where your leads come from. Know how many leads you get from a particular source as well as how many deals you get from each source. It's also important for lead routing.

A little preparation goes along way! Take some time to gather as much information about your contacts prior to importing them. There are many different points of data you can import into BoldTrail, use the above information to familiarize yourself with the main data points that will maximize impact.

Last thing! When you are ready to import / upload your leads, go to the Lead Engine and use the Bulk Import tool in BoldTrail to either *Do It Yourself* or *Let Us Handle It* for you!

Bulk Import
Get all your leads into KvCORE.

Start an Import

Learning