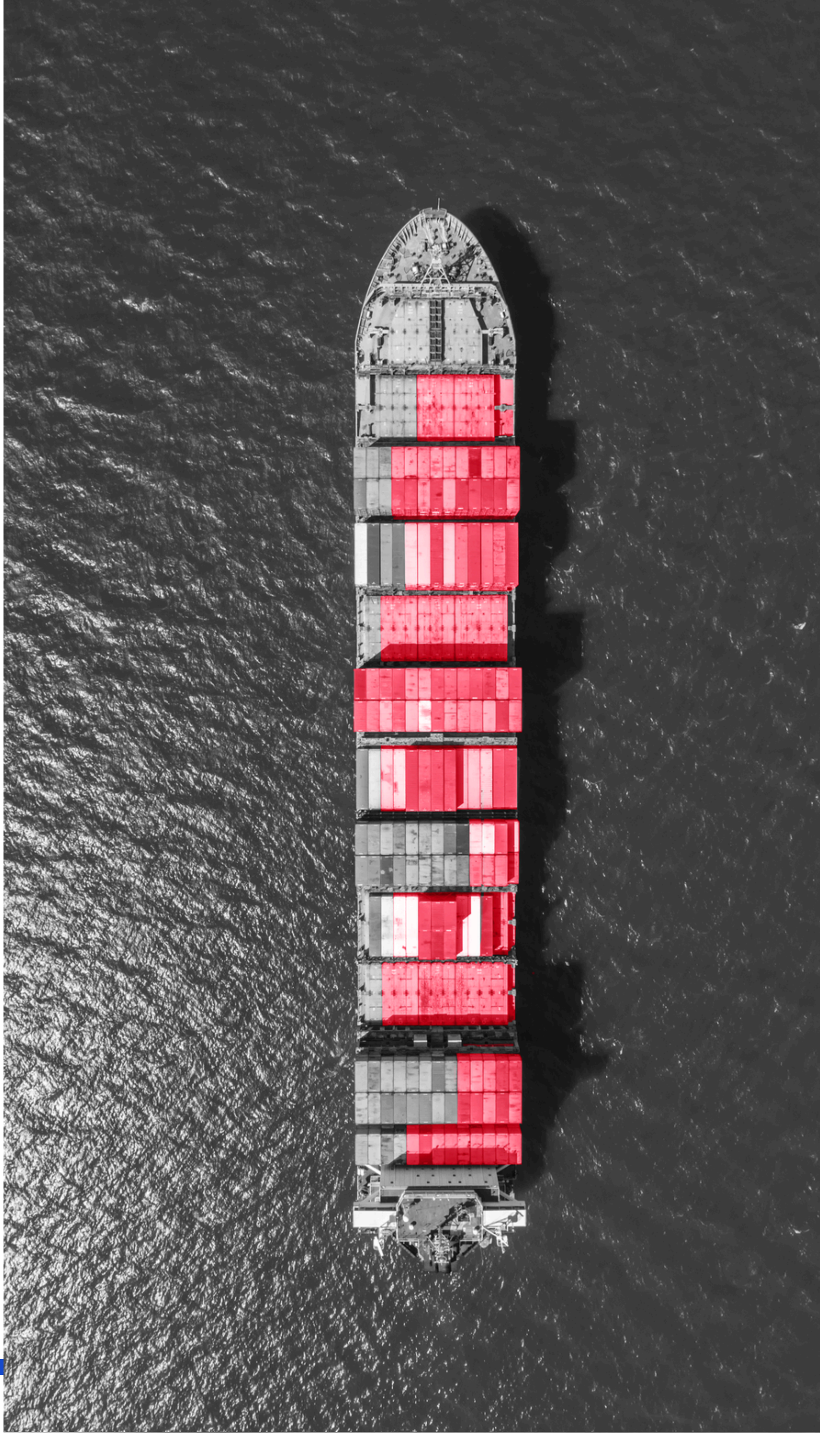
MMI.IO

POWER USER
PLAYBOOK



Tactics for Insurance

Driving Business Growth

STRATEGY NAME

Real Estate Agent Tracking

To grow your business, you need to grow your network by planting new seeds and nourishing new relationships. Start by conducting research and building a list of target prospect agent partners.

SUMMARY

- **What is it?**
  A quick and effective way to keep track of an agent's activity.
- **Who is it for?**
  Anyone wanting to keep tabs on agent listings.
- **Where do you find it?**
  MMI home page > Real Estate tab > Real Estate Tracking
- **How do I do it?**
  Add existing and prospect realtor partners to your tracking list from their Fast Fact Profile by clicking *Track*.
- **When should you take action?**
  Today! Continuously add realtors to build up a solid pipeline.
- **What if I do/don't do this?**
  Tracking agents in MMI provides insights into their transaction history and current listings. Not using the tool may result in missed opportunities and potential relationships that could end up benefitting competitors.

NEXT STEPS

- Find an agent you want to track in MMI. From their Fast Fact profile, and hit "Track."
- MMI will send you daily email alerts for any active listings or recently sold deals. Create a folder to hold all email alerts in regards to your agents.
- Time to call and congratulate! Get the conversation started using our scripts as a jumping off point.
- Rinse & repeat - every alert is an opportunity!

Watch how-to video

STRATEGY NAME

Same-Day **Listing**

After enabling your Real Estate Agent Tracking strategy, implement the Same-Day Listing strategy to demonstrate your proactive support and add value to your partnership with agents.

SUMMARY

- **What is it?**
  This strategy is an extension of the RE Agent Tracking feature.
- **Where do you find it?**
  Under Real Estate > RE Agent Tracking. Based on any agents you're tracking the system will notify you when an agent gets a new listing.
- **How do I do it?**
  When a new listing hits the market for one of your tracked agents, MMI will send an email containing the agent's name, phone number, and a link to all of their listings. An additional live web search link helps you validate for accuracy.
- **When should you take action?**
  To fully utilize this feature, you should reach out to the agent about the new listing as soon as you get your email alert.
- **What if I do/don't do this?**
  If you contact the agent immediately, you may secure this deal and future opportunities. Delaying your contact risks losing this deal and the chance to establish a relationship with a new agent partner.

NEXT STEPS

- Ensure you are tracking agents that you would like to build a relationship with.
- MMI will now start tracking them for active listings and the system will alert you when a new one is added. Note that due to several factors, the timing of alerts varies by listing; some will be sent within hours, others can take up to 72 hours.
- Time to call to congratulate them on their new listing. Timing is critical as these alerts are often sent within hours of the listings being posted. Validate the information and then follow your script.
- Rinse & Repeat - Every alert is an opportunity!

Watch how-to video

STRATEGY NAME

View New Listings by Map

Understanding your market and being the first to know when and where new listings become available is key to growing your business and building new agent relationships.

SUMMARY

- **What is it?**
  A quick way to see new listings by region.
- **Who is it for?**
  Anyone looking for opportunities to work with realtors who have new listings on the market in specific areas.
- **Where do you find it?**
  MMI home page > Other > New listings
- **How do I do it?**
  Choose the lookback timeframe, then enter your zip code or city and see results on the map and in a list.
- **When should you take action?**
  Daily! New listings are added to MMI as soon as they hit the market.
- **What if I do/don't do this?**
  Using MMI to stay updated on new listings provides insight into the current activity of real estate agents in your market. Not using the tool may result in missed opportunities.

NEXT STEPS

- Find listings in your area and click on the agent's name to navigate their Fast Fact profile.
- Learn more about the listing agent and add them to your tracking alerts if you want to keep up with their listing activity.
- Import them into your CRM to start reaching out. Call the agent and congratulate them on their new listing.
- Rinse & repeat — every new listing is an opportunity!

STRATEGY NAME

Research **Title Offices**

Targeting and identifying the top-ranked companies is another way to assist in your efforts to grow your business and network. MMI provides insights on the top ranked companies and more.

SUMMARY

- **What is it?**
  The ability to research title offices for relationship building.

- **Who is it for?**
  Anyone looking to make informed business decisions based on valuable data insights.

- **Where do you find it?**
  MMI home page > Title

- **How do I do it?**
  Search by title company name and state, and title company rank.

- **When should you take action?**
  Daily. MMI updates regularly with the most up-to-date transaction data.

- **What if I do/don't do this?**
  If you routinely use MMI's data you will identify and uncover more valuable information to use when speaking to new referral partners. If you don't, then you might miss key points of interest to grow your business.

NEXT STEPS

- Use the Title Rank by State tool to build a search report.

- Once satisfied with the results, view the company profile page for powerful insights into relationships and activity.

- Rinse & repeat — always know your Title partners.

Learn more here

STRATEGY NAME

CRM Sync

Push an agent's contact details with one-click to organize and automate your outreach by integrating MMI with your CRM.

SUMMARY

- **What is it?**
  A webhook connection between your CRM and MMI, allowing you to seamlessly import contacts into automated marketing campaigns.
- **Who is it for?**
  Anyone looking to add new referral partners to their network or grow relationships with existing agent partners.
- **Where do you find it?**
  On the contact's Fast Fact profile, you'll see a green person icon.
- **How do I do it?**
  First, your IT team will need to set the webhook up. Once complete, click the Add to CRM button and a window will appear. Verify the info and push the data into your CRM.
- **When should you take action?**
  Any time you have found an agent partner you wish to enroll in automated outreach communications.
- **What if I do/don't do this?**
  Integrating MMI with your CRM allows you to add target partner contacts into marketing campaigns at the click of a button. Without this integration, you'll spend time on manual export and import processes that could be allocated towards finding new partners, nurturing relationships, and earning more business.

NEXT STEPS

- Ask your admin or IT team to set up the webhook between your CRM and MMI if it has not yet been set up yet.
- Build an automated outreach campaign inside your CRM, complete with engaging emails, text messages, and call tasks.
- Click the export to CRM button to the right of the contact's name via their Fast Fact profile. A form will pop up to confirm which fields you want to carry over into your CRM.
- Click **Send CRM Push** to instantly add the contact into your CRM.

Watch how-to video

STRATEGY NAME

Buyside Agent **Insights Dashboard**

The Buyside Agent Insights dashboard is available to those with access to the Sales module of MMI's Visual Intelligence tool. This agent-focused dashboard offers insights into top-performing buyside agents in the market.

SUMMARY

- **What is it?**
  Visual data sets with flexible filters providing county-level data paired with agent leaderboards to help you understand where the top buyside agents operate.
- **Who is it for?**
  Anyone looking to add new referral partners to their network and expand their footprint by capitalizing on new opportunities in areas with significant transaction activity.
- **Where do you find it?**
  MMI home page > Dashboards > My Dashboards > Sales > Buyside Agent Insights
- **How do I do it?**
  To explore a specific county of interest, gather insights such as the number of loan officers and buyside agents, average agent relationships, production volume averages for loan officers, and average and median loan amounts. This data will help you evaluate potential business expansion in the area.
- **When should you take action?**
  Any time you are researching referral partners who fit your needs.
- **What if I do/don't do this?**
  By leveraging these insights, you can refine your strategies, foster stronger agent relationships, and ultimately drive business growth in a highly competitive real estate market.

NEXT STEPS

- Ensure Visual Intelligence Dashboards are connected to your core MMI account.
- Play around with filters to build different reports, and bookmark filters to revisit saved searches.
- Rinse & repeat — continue pushing candidates into your CRM.

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