Database Hygiene Tips For CRM

- Be sure to add descriptive tags for each segment or bucket of contacts in your current database.
  - ☆ **Pro Tip** → *Descriptive Tags (along with defining pipeline/stages) will enable you to send very targeted follow up and marketing messages that will provide value to the recipient based on where they are in your sales funnel.*
  - Also make sure your contacts are organized into proper pipelines /FUB stages. *(More below on stages)*
- **Stages or Pipelines** → Where the contact is in the Sales Process
  - *Stages/Pipelines we recommend:* Buyer, Seller, Lead, Hot Prospect, Nurture, Pending, Closed, Past Client, Sphere, Vendor, Agent, Trash

Stage/Pipeline Definitions

Lead **someone you have never talked to and know nothing about**

Hot Prospect **will be buying or selling in the next 0-3 months**

Nurture **will be buying or selling in the next 3-12 months**

Buyer **is your client - Buyer Rep signed**

Seller **is your client - Listing Agreement signed**

Pending **buyer or seller client under contract**

Closed **buyer or seller contract closed - add a tag for "Closed (year)"**

Past Client **move all contacts with a tag of "Closed (year)" at the end of December**

Sphere **referral network, friends, family**

Trash **has unsubscribed, passed away, no valid phone or email**

- **Preserve and/or define Lead/Contact Sources** in your current database prior to the csv file export → for tracking & insights for your Marketing Campaigns later
- ☆ **Pro Tip** → Segment past client lists into "year closed" *This will allow you to do "most likely to move" marketing campaigns.*
  - (Example for tagging these lists = Past client 2022)
- **Assigned Agent**
  - Make sure all of your database contacts are assigned to the proper member of your team