



SALES MEETING TOOL KIT: Part 14 USING E-MAIL EFFECTIVELY

- Introduction: Using E-Mail Effectively
- Component 1: Facilitator talking points
- Component 2: E-mail agenda
- Component 3: Action Plan worksheet
- Component 4: Story of business e-mail success
- Component 5: Activity 1: E-mail Quiz (handout)
- Component 6: Activity 1 answers
- Component 7: Appropriate uses of e-mail (handout)
- Component 8: E-mail etiquette (handout)
- Component 9: E-mail marketing tips (handout)
- Component 10: Making personal contact
- Component 11: More Resources

SALES MEETING TOOL KIT: USING E-MAIL EFFECTIVELY

As more people get online to investigate properties, e-mail is often their initial means of contact with you. If you understand how to use it to cultivate relationships, you'll profit. Regard it as little more than the electronic version of a canvassing letter and others will get the business.

This sales meeting tool kit will prep your salespeople for an increasingly electronic business world.

Each element of this tool kit is numbered at the top of the page so you can easily move through the contents chronologically.

SALES MEETING TOOL KIT: USING E-MAIL EFFECTIVELY

Component No. 1: Facilitator Talking Points

These notes will guide you and your salespeople through a discussion and activities on e-mail use.

Before the meeting:

- Review all the meeting documents in this kit
- Know your company's existing e-mail policy
- Determine how you'll change your company's policy, if necessary

Print the following:

1. These Facilitator Talking Points—Component 1
2. E-mail Agenda—Component 2
3. Action Plan Worksheet (to be completed by facilitator/broker before the meeting)—Component 3
4. Story of Business E-mail Success —Component 4
5. Activity 1/Handout 1: E-mail Quiz —Component 5
6. Activity 1: Answers—Component 6
7. Handout 2: Appropriate Uses of E-mail—Component 7
8. Handout 3: E-mail Etiquette—Component 8
9. Handout 4: E-mail Marketing Tips—Component 9
10. Handout 5: Making Personal Contact—Component 10
11. Action Plan to Ensure Salespeople Use E-mail Appropriately—Component 11

True Stories (3 min.)

Gain participants' attention about the importance of safety in one of three ways:

1. Have them read the article, "Slash Your Ad and Mailing Costs," (Component 4) about how to use e-mail effectively in marketing real estate.
2. Relate a story about yourself or someone you know who successfully uses e-mail in selling real estate.
3. Ask the group for their e-mail marketing success stories.

SALES MEETING TOOL KIT: USING E-MAIL EFFECTIVELY

Component No. 1: continued

Background and goals (3 min.)

To segue from the true stories to the discussion, tell participants:

"E-mail has put communication at our fingertips. But no matter how casual an electronic conversation may be, what's written in e-mail can last forever—saved to a mail server, forwarded to others, or printed out. With this in mind, our company wants to prevent problems and help you use it to your best business advantage.

In this meeting, we will:

- Demonstrate appropriate e-mail etiquette.
- Explain how to use e-mail to build business.
- Explain how to make the transition from e-mail to face-to-face contact.

Activity No. 1 (5 min)

Have the salespeople complete Activity No. 1, a true-false quiz (Component 5).

When they're finished, review each question. Ask them what they think the right answers are? Why? Use the "Activity 1 Answer Sheet" (Component 6) to explain the correct answers. Ask participants to come up with alternatives to the "false" scenarios.

How to use e-mail (5 min.)

Use the handout (Component 7) to review the different types of e-mail and discuss which situations each is best suited to.

E-mail etiquette (7 min.)

Discuss e-mail etiquette by reviewing the handout (Component 8). Talk about the do's and don'ts of writing and responding to e-mail.

Activity No. 2 (7 min.)

Ask the salespeople (either together or in small-group breakouts) to brainstorm the advantages and disadvantages of e-mail, which you can list on a flip chart. Have the group(s) discuss ways to adapt those advantages to their marketing practices.

SALES MEETING TOOL KIT: USING E-MAIL EFFECTIVELY

Component No. 1: continued

Marketing tips (7 min.)

Review the types of electronic communications and how to grab attention with subject lines (Component 9). Ask the group to share how they've used various communications and what success they've had.

Making contact (7 min.)

Discuss when and how to turn an electronic relationship with a prospect into personal contact (Component 10).

Activity 3 (2 min. set up)

Explain that you're going to hold a contest. Within the week, you'll send an e-mail to the salespeople that will appear to come from a first-contact prospect—a cold e-mail, if you will. The salesperson who's the first to respond—within the appropriate time frame and using the learned techniques—gets a prize (gift certificates, free supplies), which you can determine.

Adjourn.

Thank them for their time.

SALES MEETING TOOL KIT: USING E-MAIL EFFECTIVELY

Component No. 2: Agenda

Welcome (2 min.)

True stories (3 min.)

1. Read the article about using e-mail effectively in business, or
2. Relate personal stories on e-mail success or disaster

Background, goals, and objectives of the e-mail meeting (3 min.)

Activity 1—E-mail true-false quiz (5 min.)

Review and discuss the correct answers.

Using e-mail effectively (5 min.)

Different types of electronic communications and when each is appropriate

E-mail etiquette (7 min.)

Activity 2—Advantages and disadvantages of e-mail (7 min.)

List the advantages and disadvantages of e-mail. Discuss ways to use those advantages in your marketing practices.

Marketing tips (7 min.)

Share how e-mail has and hasn't worked for you.

Making personal contact (7 min.)

Discuss when and how to move from e-mail communications to more of a personal form of communication (phone, face-to-face contact).

Activity 4—A contest (2 min. set up)

The first salesperson to respond to a first-contact e-mail, which the broker will send sometime during the week, wins a prize. Criteria: The winner must have responded in the appropriate time frame and used the e-mail techniques learned here.

SALES MEETING TOOL KIT: USING E-MAIL EFFECTIVELY

Component No. 3: Action Plan Worksheet

Use the chart to update your salespeople about company e-mail policy during the sales meeting. Use the blank form below to customize your own chart.

The left column lists e-mail considerations. The "remarks" column provides suggestions on how you can incorporate these considerations into your office policies. Use the other columns to identify whether the guidelines will become part of the policy or simply suggestions. For example, if copyright considerations will be part of your policy, place a checkmark under the policy column and indicate where to find the information in the policy manual. If the topic is already part of your office policy, provide a copy.

E-mail Considerations	Policy	Suggestions	Guidelines
Copyright			Consider implementing office policy guidelines indicating that information on the Internet is copyrighted. Salespeople should give credit to the source if they borrow a few lines from a site and should ask permission if they use information that is more extensive.
Using the company e-mail system			Remind salespeople that when they use the company e-mail system, they're representing the company.
Etiquette			Explain that proper use of e-mail—correct spelling, avoiding all capital letters—demonstrates professionalism.
Integrating e-mail into a marketing plan			Emphasize that salespeople shouldn't send unsolicited e-mail, or spam. It is illegal to send out e-mails unless a person has requested information or given you permission to send certain types of information. E-mail newsletters should include an easy way for recipients to unsubscribe. Salespeople should explain the company's privacy policy or compose their own at their Web site so that contacts can be sure their personal information isn't being shared.

SALES MEETING TOOL KIT: USING E-MAIL EFFECTIVELY

Component No. 3: Action Plan Worksheet

E-mail signatures			Identify what salespeople should consider including in their e-mail signatures (company name and contact information, link to company's privacy policy).
Viruses			Encourage salespeople to install an antivirus program on their laptops and home computers, and consider offering training on how. If your company has installed such a program on in-house computers, show them how to use it.

SALES MEETING TOOL KIT: USING E-MAIL EFFECTIVELY

Component 4: True Stories

"I'm not a technology guru," says John M. Peckham III, CCIM, president of The Peckham Boston Advisory Co., "but I know a good selling tool when I see it. And e-mail is the best."

The first time Peckham used e-mail in his business, he sent a message to 92 commercial and investment real estate specialists about a property listing he'd recently received. Within three days, Peckham had closed a \$2.6 million deal.

Peckham uses his e-mail primarily as a marketing tool. When he wants to sell a particular property, he sends a note to other commercial and investment specialists he thinks might know of potential buyers. "I start with a catchy headline, and I make it personal and conversational," says Peckham. A recent e-mail he sent began, "Good morning! My 95-year old doctor, retired (thank God!), has asked me to help him sell four properties in Florida."

In addition, Peckham says, he conceals from people receiving a message that they're the one in a large group of recipients. The doctor message went to more than 600 real estate practitioners, "but it looked to all those who received it as if I'd personally sent it to them. I find that really helps my response rate," Peckham says. Had he sent the information by regular mail, Peckham estimates it'd have cost about \$1 per piece, factoring in postage, paper, printing, and staff time for stuffing envelopes. Cost of the same mailing by e-mail: \$0, except for the time Peckham spent creating the message and the monthly fee for his online service.

Copyright 2001. Adapted from "Slash Your Ad and Mailing Costs with E-Mail," by Pamela Geurds Kabati, *Today's REALTOR®*, and April 1996.

SALES MEETING TOOL KIT: USING E-MAIL EFFECTIVELY

Component 5: Activity 1, True-False Questionnaire

Directions: Read the following questions and answer true or false.

- 1.** Information on the Internet is considered public information and isn't copyright protected. Copying such information and using it in your electronic correspondence is okay. **T F**
- 2.** You can't be held liable for comments you make in e-mail. **T F**
- 3.** Using e-mail is an efficient method of communication with some client groups. **T F**
- 4.** Answer e-mails within a week. **T F**
- 5.** Treat e-mail prospects the same way you treat traditional buyers. **T F**

SALES MEETING TOOL KIT: USING E-MAIL EFFECTIVELY

Component 6: Activity 1, True-False Questionnaire Answers

Directions: Read the following questions and answer true or false accordingly.

1. Information on the Internet is considered public information and isn't copyright protected. Copying such information and using it in your electronic correspondence is okay. **F**

Explanation: Just because information is available on the Internet doesn't mean that you can claim the information as your own. As with books, magazines, and other published materials, information is copyright protected. It's permissible to use a few sentences from a copyrighted source, provided you give credit to your source. To use large amounts of material or forms, ask the site owner for permission first.

2. You can't be held liable for comments you make in e-mail. **F**

Explanation: Your electronic statements could come back to haunt you. Maybe you sent a joke that you thought was funny, but offended a client. Or perhaps you made a comment about a neighborhood that was interpreted as a violation of the Fair Housing Act. Anything you send in an e-mail is as permanent a record as hard-copy documents. E-mail can easily be forwarded or printed for sharing. And if your company owns the e-mail system that you use for work, it has the right to read e-mail stored there.

3. Using e-mail is an efficient method of communication with some client groups. **T**

Explanation: You can send thousands of messages quickly for little or no cost, other than your monthly e-mail service charges. However, remember that not every e-mail you send may be read. That's why it helps to include an attention-grabbing subject line. In addition, be considerate of those clients and customers who prefer personal contact to electronic communication.

4. Answer e-mail within a week. **F**

Explanation: Answer as soon as possible. Some brokers believe that responding within 8 hours is critical. "After that, the contact's interest in hearing from you diminishes quickly," says Mary Bills of Lincoln, Neb. Responding quickly is the most important thing you can offer, at least when you're just starting to deal with someone.

5. Treat e-mail prospects the same way you treat traditional buyers. **F**

Explanation: "Everything you've been taught about building successful relationships with the traditional buyer can actually work against you online," says *Realtormag.com* Internet marketing columnist Michael Russer. "Internet-empowered consumers control the relationship because they're immune to the power of personality and subliminal cues, which do so much to shape the off-line relationship."

SALES MEETING TOOL KIT: USING E-MAIL EFFECTIVELY

Component 7: E-mail Types and Tips

Reactive e-mail requires a reply. Such e-mails may be general inquiries or requests for specific information. When you respond to such an e-mail, be sure to mention your services, focusing on what you can do for consumers.

Proactive e-mail is what you send when you set up a business meeting or solicit business. Be sure that the recipients have already indicated they'd be willing to receive e-mail from you. Unsolicited e-mail, or spam, is a cyber no-no—the equivalent of an unwelcome telemarketing call. How can you obtain permission? Some practitioners send out snail mailings to their farm offering CMAs if consumers share their e-mail addresses. You can also collect e-mails through your Web site asking buyers to complete a form about their wants and needs and by offering free reports to those who provide their contact information.

Informational e-mails include such information as policy updates, meeting schedules, listserves, and newsletters for which no reply is expected.

Nonfunctional e-mails serve no business purpose.

Chain letters and jokes. Before you forward the joke or chain letter that you've just received to all your friends—or even established clients—ask yourself if they'll be glad you did. Will it annoy them because it clutters up their in-box or, worse, will they be offended?

Urban myths. These shocking stories appear to be true. But remember not everything you receive by e-mail or read on the Internet is based in fact. Before sending off a warning about a hypodermic needle found in the ball pit at a McDonalds restaurant, check to see if the story is true. Has it been in the mainstream press?

Spam. No one likes to receive unsolicited e-mail selling products or services. If you solicit business without first getting the recipient's permission to send them e-mail, you violate spam rules. Your marketing message could appear invasive and backfire on you.

SALES MEETING TOOL KIT: USING E-MAIL EFFECTIVELY

Component 8: E-mail Etiquette

Although an e-mail message may be informal, it's important to follow common etiquette guidelines. Remember, you're representing yourself *and* your company in your e-mail correspondence.

1. Don't yell.

USING ALL CAPITAL LETTERS IN AN E-MAIL IS THE SAME AS YELLING AT A PERSON. In addition, an all-caps message is difficult to read. Caps are more effective when used sparingly for emphasis.

2. Just the facts, ma'am.

Be concise in your e-mail message. Your recipients may have hundreds of e-mails to read. The last thing they want to read is an endless, directionless message.

3. Less is more.

Punctuation. One exclamation point is just as effective as five in a sentence. And the fewer used in the overall message the better. They're distracting.

Abbreviations. Many abbreviations have more than one meaning. Stick to common abbreviations, such as ASAP.

Smilies. Those cute little faces you create with punctuation keys :-) should be used sparingly and appropriately. To some, they may seem more cutesy than professional and can be distracting.

4. Easy on the formatting.

All e-mail systems aren't created equal. Copy that appears with fancy fonts, bold lettering or colors, and bulleted lists on your system may come across as gibberish on the receiving end. Keep your e-mails plain and simple. Many e-mail text fields don't allow for much formatting anyway.

5. Check your spelling.

Spelling errors not only look unprofessional, they draw attention to the misspelled word instead of the message in your e-mail. If your e-mail system includes a spell check feature, use it. And read through your message word for word before sending it because spell check doesn't detect syntax errors nor does it know that you meant "though" even though you typed "through."

SALES MEETING TOOL KIT: USING E-MAIL EFFECTIVELY

Component 8: continued

6. The joke may be on you.

One person's witticism may be another's ground for a lawsuit—or at least a nasty response. Something that you say in person may come across differently when written. Keep in mind that the receiver may not share your sense of humor, values, or cultural background.

7. Tell them your sign.

Sometimes it's difficult for the e-mail recipient to figure out from whom an e-mail originated. So always add your "signature" (your name, company name, e-mail address, and phone numbers) to all your e-mail.

8. Return to sender.

When you respond to e-mail, include the entire previous message (depending on its length) or the part of the message that corresponds to your response. It ensures that your response will be read in context.

SALES MEETING TOOL KIT: USING E-MAIL EFFECTIVELY

Component 9: E-mail Marketing Tips

E-mail can be used to initiate communication, maintain business relationships, and close a deal. Here's how to use it as a marketing tool:

1. Use various electronic communication vehicles.

Listserves are electronic mailing lists. Perhaps you maintain routinely updated reports or information—school stats, restaurant reviews, or price changes—at your site that visitors can sign up to receive weekly or monthly. Because visitors take the initiative to subscribe, you're not spamming them. And listserves let you target a specific audience who want that information.

Contact management databases let you keep preference and contact information, including e-mail addresses, on clients and customers. Provided those contacts have indicated that they're willing to receive e-mail from you, you can segment your database and send marketing messages and information appropriate to different groups.

Electronic newsletters—weekly, monthly, quarterly—can be a nonpromotional way to reach prospects, clients, and customers. It keeps your name in their minds and should offer practical real estate information, such as buying and selling tips. Remember to include a link to your e-mail as well as instructions on how to unsubscribe from the newsletter.

Web sites give prospective clients and customers a pressure-free way to evaluate you and your company. Include your contact info and e-mail address prominently, along with a link to subscribe to your electronic newsletter. Make sure your Web site address is on all your print marketing materials.

Online discussion groups help you spread the word about yourself. Join a group that discusses a topic you're interested in or a topic that relates to the niche market you specialize in. Your profession will naturally become part of the discussion, which may net prospects.

SALES MEETING TOOL KIT: USING E-MAIL EFFECTIVELY

Component 9: continued

2. Grab attention in the e-mail subject line.

Subject lines in messages afford precious little space—just a few words—to grab recipients' attention. Follow these do's and don'ts:

Do's:	Don'ts:
<ul style="list-style-type: none">▪ Use motivations.▪ Create intrigue.▪ Use active verbs (save, benefit).	<ul style="list-style-type: none">▪ Use exclamation points—not even one.▪ Use dollar signs \$\$\$.▪ Use ALL CAPITAL LETTERS.

The do's and don'ts will also help your message stand out from the junk e-mails that people receive as well as elude spam filters—software that blocks suspect e-mail based on characteristics in the subject line.

3. Include links in all of your electronic correspondence.

All e-mail correspondence should contain links to relevant information. If you're trying to sell a specific house, include a link that takes the recipient to a graphic file or Web site page with a picture and property stats. Also, include links to your company Web site, your personal site, your electronic newsletter sign up, and your e-mail address.

4. Ask recipients to forward your e-mails.

Referrals are a great way to get new business. Don't hesitate to ask recipients to pass on your information to friends, family, and colleagues who may be interested.

5. Include a privacy policy.

Your Web site should contain a statement explaining that all the personal information—name, address, financial—recipients send you is confidential and won't be sold or passed on to third parties. Your e-mail privacy policy should be part of your overall Web site privacy policy.

6. Research existing marketing materials.

Before creating an electronic newsletter or e-mail promotion from scratch, check out the companies—Realty Times-Realtormag.com [Newsletter Plus](#); [Sane Marketing for Real Estate Professionals](#) are two—that sell templates for generating such communications.

SALES MEETING TOOL KIT: USING E-MAIL EFFECTIVELY

Component 10: Making Personal Contact

One of the advantages of developing a business relationship online is that your worth is entirely dependent on your ability to provide useful information in a timely manner. The challenge is to make the transition to off-line without undermining all the credibility you've established electronically. Here are some strategies:

- 1. Don't rush them.** Internet-empowered consumers maintain control over the online relationship. Don't push IECs to move faster or to reveal themselves sooner than they're ready. You're likely never to hear from them again.
- 2. Make yourself available.** Don't initiate the first call unless or until you are invited. But do offer to call when there's confusion about information or when a buyer seems especially rushed to find a home. Make sure that when prospects are ready to reach you, they can do so. Include your contact information of all of your e-mail correspondence.
- 3. Show your worth.** Answer questions thoroughly and direct contacts to helpful resources. People who are considering an area want more than property information.
- 4. Provide timely responses.** People who are impressed with how quickly you respond to e-mail will expect the same service offline.
- 5. Be open-minded.** Cyberspace negates body language, appearance, and pretense. Don't be surprised when people's faces or forms don't match your preconceived notions. Similarly, you may not match their image of you. Luckily, through e-mail, you've already gained their trust. And that's the most critical component in any business relationship.

SALES MEETING TOOL KIT: USING E-MAIL EFFECTIVELY

Component 11: Other Resources

Visit REALTOR.org and search "e-mail."

"[Don't Risk It! A Brokers Guide to Risk Management](#)", chapter on technology (#126-358)

"[Communicating in a Wired World](#)," REALTORS® Guide to the Internet, supplement to *REALTOR® Magazine*, April 2000.

"[Before You Incorporate "REALTOR" into Your E-mail Name . . .](#)", Ask Mr. Internet, Realtormag.com, October 1998.

"[What's an E-mail Signature?](#)" Ask Mr. Internet, Realtormag.com, and September 1998.

"[E-mail Autoresponders](#)," Ask Mr. Internet, Realtormag.com, and August 1998.

"[Bring AOL Users into Your Marketing Plan](#)," Ask Mr. Internet, Realtormag.com, February 2000.

"[E-mail Virus Warnings](#)," *REALTOR® Magazine*, June 1999.

"[But It's on the Internet!](#)" *REALTOR® Magazine*, December 1998.

"[Slash Your Ad Mailing Costs with E-mail](#)," *REALTOR® Magazine*, April 1996.

"[E-mail Newsletters](#)," Ask Mr. Internet, Realtormag.com, and June 1999.

"[What's Multimedia E-mail?](#)" Ask Mr. Internet, Realtormag.com, and December 1998.

"[Yes, You Can Personalize Group E-mails](#)," Ask Mr. Internet, Realtormag.com, April 1999.

"[Zap Your E-mail with New Capabilities](#)," Realtormag.com, April 2000.