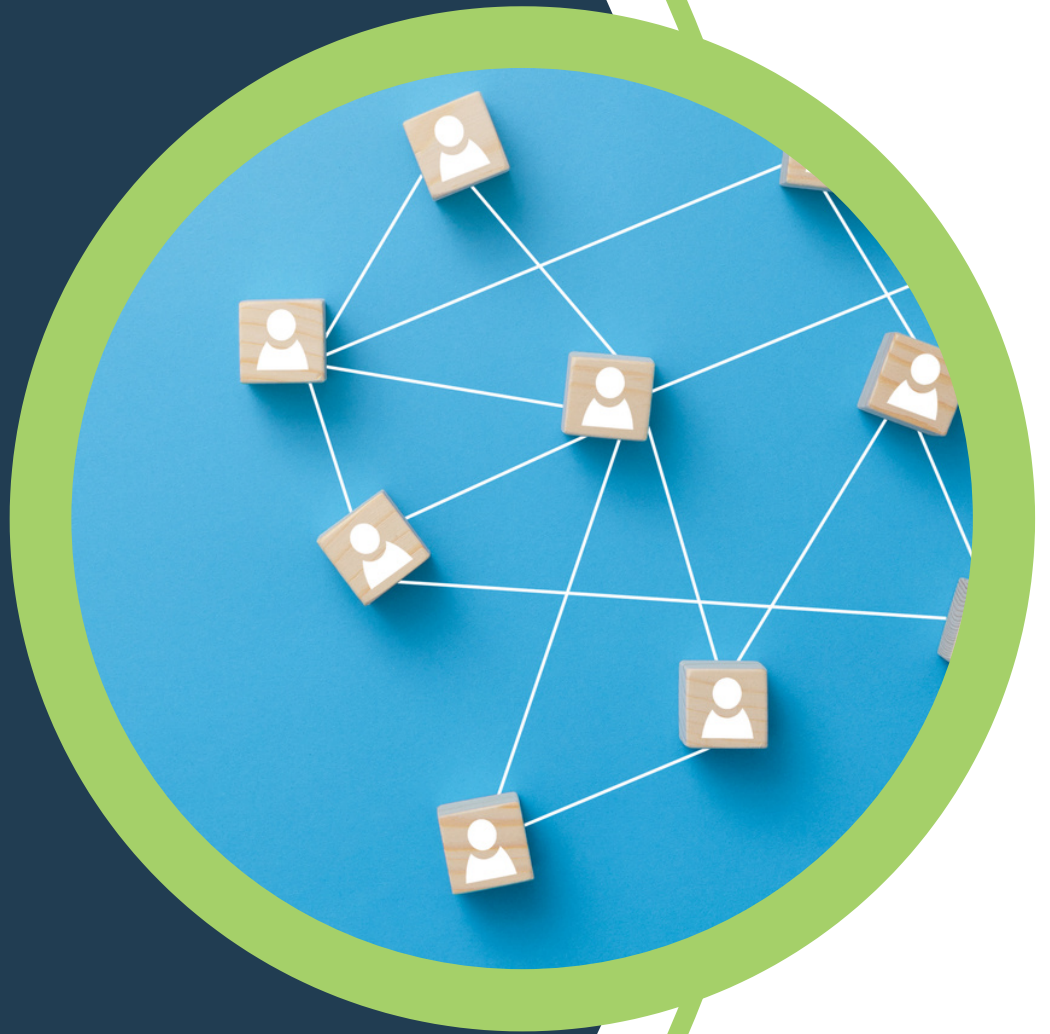


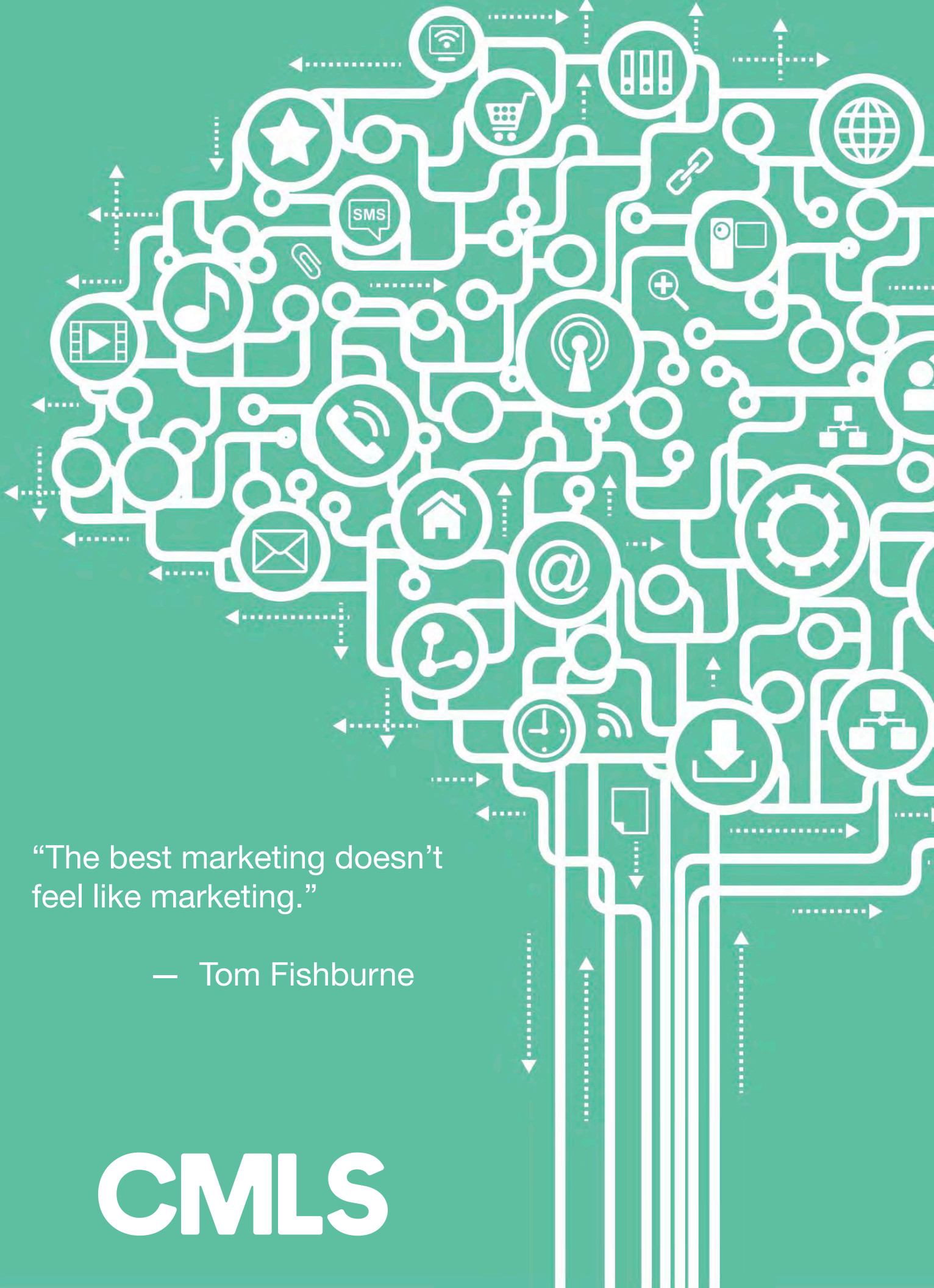
MARKETING & COMMUNICATION BEST PRACTICES



CMLS BEST PRACTICES GUIDE FOR THE MLS

CMLS Best Practices bring together emerging and proven practices from across real estate to align and advance professional standards within the MLS industry.

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“The best marketing doesn’t
feel like marketing.”

— Tom Fishburne

CMLS

BACKGROUND

CMLS Best Practices began as a work group initiative that grew out of an idea submitted in 2013. From that initial work group spark, the group curated the best ideas submitted by attendees, added policies and procedures gathered from CMLS members, and recruited Ann Bailey of Pranix Inc. to refine, organize, and add further insights. The result was the publication of seven documents capable of guiding any MLS organization to meet industry standards and recognized benchmarks.

The objective of these documents is to help MLSs of all sizes make the market work by encouraging them to adopt the best practices of a community that consists of leading MLSs and business partners. In sum, best practices help MLSs and customers succeed.

In an effort to keep pace with a rapidly changing marketplace, CMLS began work on a newly updated set of comprehensive documents that would help MLSs deliver the tools, tactics, and technologies their customers need.

The result was the creation and publication of the Marketing & Communication Best Practices document, a guide that retains proven strategies while providing additional insight into marketing and communication. Its development was spearheaded by the CMLS Marketing And Communication Section Council along with numerous contributing organizations referenced at the end of the document.

DEVELOPMENT

More than a dozen communication and marketing experts and countless MLS professionals are responsible for the development of the Marketing & Communication Best Practices Guide. For a partial list of contributors providing research, insight, and authorship, please see the references. Thank you.

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OVERVIEW

Marketing and communication encompasses a broad range of activities such as product development, product pricing, sales, customer service, branding, research, stakeholder communications, and public relations. Stakeholders are those people who have a vested interest in the organization such as brokerage firms, agents, stockholders, directors, consumers, and employees.

MARKETING MANAGEMENT

Traditional marketing is a management process used to take goods and services from concept to market. The four elements of this process are called the 4 Ps of Marketing:

1. Identification, selection, and development of a **product**.
2. Determination of a **price**.
3. Distribution channel to reach the customer's **place**.
4. Development and implementation of a **promotional** strategy.

Marketing is based on thinking about the business in terms of customer needs and satisfaction. Marketing differs from selling. In the words of Theodore C. Levitt, retired Harvard Business School professor: "Selling concerns itself with the tricks and techniques of getting people to exchange their cash for your product. It is not concerned with the values that the exchange is all about. And it does not, as marketing invariably does, view the entire business process as consisting of a tightly integrated effort to discover, create, arouse and satisfy customer needs."

In other words, marketing has less to do with getting customers to pay for your product than it does with developing a demand for that product and fulfilling the customer's needs.

Creating Value

Effective marketing ensures that the organization focuses on delivering value to the customer. For Multiple Listing Services, the value of the MLS is embedded in:

- Managing an orderly marketplace.
- Facilitating offers of cooperation and compensation.
- Ensuring comprehensive and accurate data.
- Providing efficiencies for buyers, sellers, agents, and brokers.

For an organization to be successful in marketing to stakeholders, it must embrace these values and create or deliver the products and services necessary to ultimately enhance and extend the primary values.

Product Development

Product development is the process of bringing a new product or service to the market. It typically has a set procedural process.

- Idea, concept, or innovation.
- Market research and analysis.
- Product or process design.
- Engineering and development.
- Beta testing and launch.



Product development is best done by a professional team or teams with the expertise necessary to create the ideas, conduct and integrate the market research and analysis, document the product design, develop the product, and test and launch the product. This same team must work closely with the marketing and communications team throughout this process to ensure that all phases are coordinated both internally and externally.

Many MLSs have implemented a strong internal product development capability. Others are dependent on a third-party vendor or vendors to complete the product design, along with engineering and development. Regardless, the MLS must take full responsibility to verify that the idea or concept extends the primary value of the organization and fulfills customer needs. If the MLS is selecting a primary MLS vendor, then it is incumbent on the organization to clearly define the goals of the project, the needs of the end user, and the vendor products that meet those needs.

The complexity of products desired by today's real estate community often result in multiple vendors delivering varied products. It is critical to accept the responsibility for the research, implementation, integration, and marketing of those products and services in order to meet the demands and anticipate the needs of customers.

Research

Research is essential in creating and extending the value of an MLS. It provides factual information that the organization can use to drive innovation.



Fundamental Research Questions

Question 1. What do customers value?

Question 2. How is the organization perceived?

Question 3. How are existing products perceived?

Question 4. How can new products be developed?

There are two distinct types of research: qualitative and quantitative.

Qualitative research allows people to share emotions, thoughts, and areas of concern. It also allows for the discovery of topics that the MLS may not know are issues. Qualitative techniques can include focus groups, in-person meetings and phone calls. Because of their format, qualitative techniques can result in a lot of information and can take a lot of time.

Quantitative research measures what people think in numeric terms. Since quantitative techniques have uniform questions with uniform responses, a researcher can more easily capture and tabulate results. However, this format tends to limit the amount of open-ended information that can be collected. Typical quantitative research techniques include surveys by telephone, mail, or the Internet. Depending on the number of people surveyed, quantitative surveys provide a specific level of statistical accuracy.

Research Techniques

Surveys and focus groups are common business research techniques. If the MLS is looking for innovative approaches, a focus group might be better suited for the job. In many cases, MLSs may want to survey customers to provide a broader perspective. This could include a comprehensive communications audit (providing feedback on the effectiveness of the entire communications program) or about specific products, services, and communication vehicles.

The effectiveness of mail or email surveys can be increased by notifying customers that a survey is coming and defining the purpose of the survey. If an MLS is conducting a survey about an existing publication or product, for example, it is also a good idea to send a copy of a product brochure or publication along with the survey to refresh their memories.

Question Development

MLSs need to spend a considerable amount of time and thought on developing the questions before conducting a survey. The quality of the questions is the key to a successful effort, whether it is a comprehensive communications audit, a questionnaire about a newsletter, or a focus group review of a new graphic identity (e.g., a new logo, colors, letterhead, etc.). There are several websites that are helpful in the art of drafting questions for surveys.



It may also be worthwhile to test survey questions on a small group to surface potential problems with the questionnaire before a poll of a full audience. Focus groups are practical tools for testing new publications, logos, slogans, and product considerations. Focus groups can also be beneficial at the early stages of quantitative survey development to help uncover appropriate areas for questioning. They do not require complicated sampling techniques.

As a general rule, members of a particular focus group should be like-minded to encourage a free exchange of ideas. The skill of the moderator is also essential in eliciting helpful information, especially if they are hired from outside of the organization. Separating focus groups into two different parties (staff or customers) is also a common practice.

Additional tips related to focus groups.

- Test concepts with a small number of carefully selected individuals.
- Gather a significant amount of information in a short amount of time.
- Receive more in-depth information than quantitative surveys provide.
- Craft questions that are open ended and encourage discussion.
- Keep the size of the group small, usually six to 12 individuals.

Audits

Marketing and communication audits examine the organization's marketing capabilities and the effectiveness of the organization's communication. They can be performed as independent audits or in tandem, depending the goals of the audit.

Marketing Audit. A marketing audit has certain similarities to a financial audit in that it is a review or appraisal of your existing marketing activities. Conducting a marketing audit provides the opportunity to review and appraise your entire marketing activity. It enables the MLS to assess past and present performance as well as to provide the basis for evaluating possible future courses of action.

Because the business environment is constantly changing, a marketing audit should be used as a benchmark reference tool that can be periodically updated to reflect changes in the external environment and internal needs.



Four Questions For A Marketing Audit

Question 1. Are you targeting the right people?

Question 2. Are you using the channels they use?

Question 3. Are your messages clear and impactful?

Question 4. Are you leveraging technology to position the MLS?

A marketing audit is due any time an MLS is unclear in who they are trying to reach or clear in who they are trying to reach but unclear about how effectively they are reaching that audience. Marketing audits are also timely whenever MLS programs and services changed or showed significant growth. Any time products and services change, marketing should change along with it.

Communication Audit. These audits review how effective communication tools and techniques have been implemented into the marketing strategy. This includes a thorough analysis of internal and external communication.

These audits can help determine if MLS messages are understood by customers. They can also help identify the most effective communication vehicles to address any gaps in the overall plan. Audits can be used to ask the right people the right questions, especially whenever there is a major change within an organization.

Many audits are more effective if conducted by an outside firm. In many cases, consultants are often more objective than staff, and participants tend to be more comfortable in providing honest feedback.





The Communication Audit

Review Existing Communications

Review how communication messages are being sent to your audiences. Include samples of all communication — newsletters, press releases, websites, blog posts, social media assets, etc. — as well as any relevant data on the outcomes of these vehicles. Evaluate them based on their accessibility, effectiveness, and timing. Common questions include:

- How did we communicate with our customers? What worked? What didn't?
- Were our messages consistent and graphics representative of our identity?
- Who were our key audiences, and what key messages did we share with them?
- What media coverage did we receive? What media opportunities did we miss?
- What is our definition of success? Did we tell our story?

Review the mission, vision, and values of the organization along with any existing marketing, communication, and social media strategy. Any original goals (member satisfaction, engagement, awareness) should also be considered. Then analyze what the consistent messages have been, where those messages have been sent, and what any outcomes have been. This will help determine where communication seems to be working or lacking.

Solicit Feedback From Stakeholders

Get feedback from stakeholders, which will likely include employees, vendors, volunteer leaders, and customers. Most feedback will be collected in the form of interviews, focus groups, and surveys. Common questions might include:

- What are your impressions of our communications?
- What do you think of our identity, website, and other marketing materials?
- How could we improve our communications? What haven't we done yet?

In addition to those mechanisms, consider one-on-one interviews with executives. Executives provide a unique insight into their vision of communication, any concerns they may have, related internal communication objectives, and even opinions on which staff members should be involved.

The overall goal is to align the mission and vision of the company, existing management, and feedback provided by employees, vendors, and customers. If a communication plan is failing to satisfy all of these criteria, then the organization should update its communication plan.

Collect Feedback From External Audiences

External audiences may be considered any group that may not have a stake in the organization but could potentially influence the perception of others. This includes influencers, members of the media, government officials, charitable organizations, industry peers, and others. Common questions include:

- What is the tone and impact of their communication about us?
- Were our key messages included in their communication?
- Were the right audiences being reached? What opportunities were missed?

By reviewing the external coverage of your organization, you can determine if these external audiences have the same view of your organization as your stakeholders. Articles, social media shares, and other forums all provide an organizational barometer.

Conduct A SWOT Analysis

While there are many data capturing techniques, the SWOT analysis remains a favorite among communicators and marketers because it measures qualitative opinions about the strengths, weaknesses, opportunities, and threats of the organization.

By organizing findings into those four categories, a SWOT analysis can help determine which communication methods are working well for the organization, which audiences need more attention, and what communication needs to be developed to address various threats.

Update A Communication Plan

There are several ways to outline a communication audit. Once you have searched for and chosen the best option for your organization, record any new objectives based upon all the data analyzed and collected. Then, focus on strengths, consider opportunities, minimize weaknesses, and mitigate threats. Include any changes made to the communication team, messages, channels, audiences, etc.

By conducting a communication audit every few years or any time the organization is undergoing change, it will be easier to satisfy all internal and external audience needs. Always update the communication plan to reflect any changes made as a result of the audit.



Marketing Plan Creation

A marketing plan is a written document that details an analysis of the current situation, opportunities and threats, marketing strategies and tactics, implementation and timing, product and service definitions, support and pricing models, and other elements. It may include action programs, projected revenue, market direction, organizational direction, and support for new initiatives. The marketing plan also augments and supports the strategic plan of the organization.

One essential component of any marketing plan is managing the relationship between the organization and its customers, including how it communicates to them. This may influence the promotional, educational, and customer service portions of the organization as it outlines the use of multiple communication vehicles, including print, digital, social media, media, etc. It also monitors the success and effectiveness of each vehicle used.

Since strategic goals, internal activities, external environments, and resources differ for all MLs, there is no single answer to developing an effective marketing plan. There are, however, standard components that are included in all marketing plans.

Executive Summary

The executive summary is generally a short, one- or two-page summary of the entire marketing plan. It includes highlights of each section of the plan and provides an easily understandable direction.

While executive summaries precede the plan, they are always written after the plan is complete. This ensures any changes made during the creation of the plan are included and that the summary is reflective of data and evidence-based decisions.

Some marketing plans include a background component, and others include some background information in the executive summary.

- Mission, vision, and values
- Organization’s long-term objectives
- Marketing’s support of those objectives
- Products and services offered by the MLS
- Marketing team and structure of the MLS by department
- Direct stakeholders and other external audiences
- Vendors, including accountants, consultants, and lawyers
- History of the organization, sales figures, number of customers

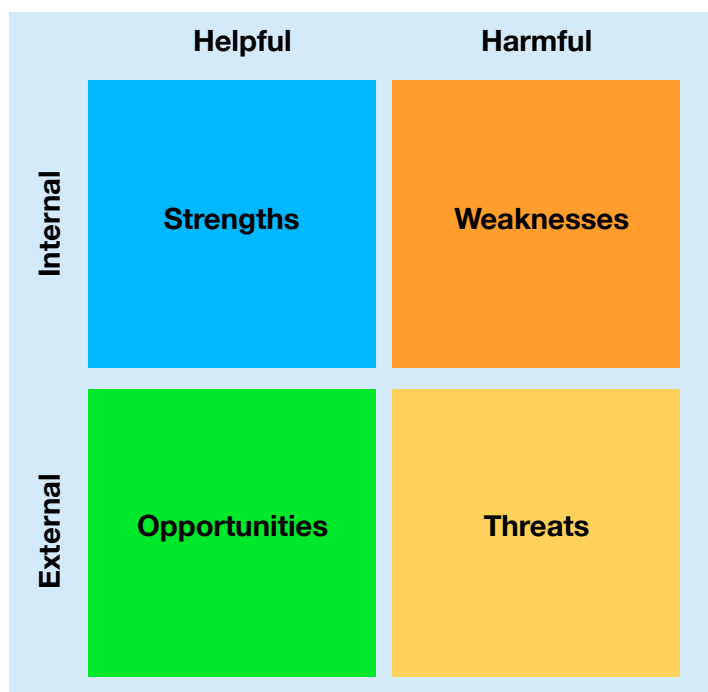
Product Description

A product description is a detailed description of the products and/or services that the MLS intends to market. It should include a thumbnail summary of the product or service and highlight benefits (unique selling points) or differentials (contrast points).

Generally, this should be thought of in two ways — first as the MLS as an organization, and second as the various products and services it may offer.

SWOT. As defined earlier, a SWOT analysis is a strategic planning technique that is beneficial in identifying any strengths, weaknesses, opportunities, and threats related to business competition or project planning.

Its primary purpose is to help specify the objectives of a business and identify the internal and external factors that are favorable and unfavorable to achieve those objectives. Marketers sometimes find it helpful to build detailed profiles of competitors that operate in the same market as well. The illustration provides a more in-depth look into how a SWOT grid is presented, with each section populated by answers to several penetrating questions.



SWOT ANALYSIS

The analysis identifies what internal and external influences may be helpful or harmful to the organization as it works to achieve its the objectives. In addition to sample questions, this Best Practices guide includes a sample chart as part of Appendix A and guide in Appendix B.



Questions For An MLS

Strengths

- What advantages does the MLS have?
 - What does the MLS do better than others?
 - What unique or low-cost resources are available?
 - What is the MLS's unique selling proposition?
-

Weaknesses

- What could the MLS improve?
 - What should the MLS avoid?
 - What resource limitations is the organization facing?
 - What disagreeable truths exist within the organization?
-

Opportunities

- What opportunities exist in the marketplace?
 - What industry trends is the MLS aware of?
 - What resource limitations is the organization facing?
 - What are customers saying about the organization?
-

Threats

- What obstacles are beginning to change the industry?
- What are competitors doing that this MLS cannot do?
- Are there any anticipated financial setbacks in the future?
- Are the quality standards of the MLS community changing?

Situational Analysis

A situational analysis or environmental scan includes the current market situation (product, pricing, and distribution), competition, challenges, and trends. It details customer requirements and changes in customer demands, what current marketing activities are the most successful (and what is not working), and an overview of last year's financials, including revenue, profit margin, and return on investment (ROI).

Target Market

Develop a profile of primary and secondary target markets. Be sure to consider geography, industry, size, accessibility, decision makers, service gaps, and underserved markets. Segment the market by common characteristics: agent, broker, geographic service area. List what is most important to your customers. Identify if your market niche needs to be more specific or more expansive.



Objectives

Goals and objectives are a detailed reflection of the mission statement and spells out exactly what the MLS expects to accomplish. Goals should include both short- and long-term objectives with a focus on expectations such as market share, personnel, resources, product development, and financial realities.

The MLS may view its short-term goals as an extension of long-term goals. Think about the MLS's long-term goals first, breaking down any required steps necessary to achieve those goals. Those individual steps are short-term goals.

Strategy

A marketing strategy needs to consider the resources available to accomplish any marketing objectives, including development, operations, marketing, finance, technology, and personnel. Each of these elements will affect the planning strategy. The more resources available, the easier it will be to help MLSs set objectives, develop plans for meeting objectives, and take advantage of marketing opportunities. Conversely, resource weaknesses restrain an MLS from taking advantage of marketing opportunities.

The marketing planning effort should be directed toward creating strategies that are resourceful and adaptable. The marketing strategy is the overall MLS program for selecting a particular target market and then satisfying customers in that segment.

Action Plan

Once the MLS marketing strategy has been created, the action plan can be finalized. The action plan should be outcome based in support of short- and long-term MLS goals. It needs to address the marketing events for the next year, including tools, techniques, and tactics (advertising, public relations, sales, etc.). Quantify each marketing tool to include specific programs, associated costs, any specific objectives, and how often you plan to use them.

Budget And Financial Projections

Financial projections are important in order to measure long-term success. The financial projections need to include all expenses, projected revenues, or non-revenue generated expectations related to the project.

The first step to creating a solid marketing budget is to organize the current financial situation. When working around estimates, it sometimes feels impossible to create a realistic marketing budget, especially if you have never had a clear one. One solution is to start one that is zero-based to establish a benchmark for future years. In the first year, simply assign dollar amounts to particular projects in order to demonstrate any necessary investment.

Marketing Budgets

How a marketing budget is presented is less important than its functionality in demonstrating a clear return on investment. In marketing, not all investments will have a financial return, but rather a “return on intent” such as positioning the MLS as an industry leader.



For each component of the plan, outline the revenue objective (or non-revenue objective) and all expenses related to the component. Include a short project description, its purpose, projected outcomes, timeline, and an itemized list of the costs involved. The goal is to be realistic about the cost to complete, since changes to a production timeline can have a major impact on the budget.

Once complete, the marketing team needs to implement a process to track, monitor, and report on various components. Some efforts are likely to cost less and some investments are likely to cost more. In some casts, unexpected resource reallocations may be required to meet specific goals. What is most important to remember is that periodic follow through provides leverage when budget increases or reallocations are requested in subsequent years.



Communication Development

An MLS mission statement and research findings are often the starting points for developing a strategic communication process for the implementation of a marketing plan. The communication section should be linked to the overall strategic direction, defining the organization's unique position in the market. This will frame the MLS and its primary objectives in a way that resonates with customers.

A communication section serves as a road map, guiding the MLS toward the specific objectives outlined by the marketing plan. A good plan ensures the MLS is doing the right work, pursuing the right goals, with the right people using the right resources.

Be specific when writing the communication section. Doing so can lead to better outcomes, especially if the plan segments customers based on their unique needs: new agents, brokers, vendors, and appraisers. The more segments within a target audience, the more specific the tactics will be to reach and influence the segments to produce outcomes.

Communication Goals

The ultimate goal of every MLS is to deliver on its mission and fulfill its vision. With that in mind, communication goals generally support these goals.

- Reflect the MLS's mission and strategy.
- Be either informational or motivational.
- Advance the business objectives of the MLS.
- Pursue outcomes that are meaningful and measurable.

Along with these points, MLSs typically work to foster a fundamental confidence in the integrity of the information and rules governing the real estate market as defined by the **value of MLS**.

Situation Analysis

A situation analysis for communication efforts is similar to one performed for the marketing plan, except it is confined to the heart of current communication. It's the reality check — analysis of positive and negative results — against which one assesses the feasibility of all tactics and strategies employed. It includes several components.

Internal Research. It benchmarks member value and gets staff on the same page by using self-evaluation techniques as well as feedback from leadership, board of directors, staff members, and customers. It determines why you are investing in an activity. For example, if not enough members are opening emails, it's important to find out why.

Member Research. Formal member surveys identify several key messages about what members consider relevant and how they prefer to receive communications. Allow members to rank the most important topics they want to read/hear/learn about as well as their satisfaction with existing communication.

Competitive Analysis. Determine what other organizations provide similar products and services to their members or any shared members. Find out how successful these products and services might be. Consider whether their approach is a threat or opportunity.

Communication Assessment. Communication excellence includes the clear and consistent design of all communication, the readability of the content, the writing style and tone, and the benefit to the member — delivered in the way they want it delivered, at the time it makes sense, and with a frequency that produces results.

Target Audiences

The next step in the planning process is to define and prioritize target audiences. The segmentation of different audiences will provide several lists.

- List the various audiences that the organization wants to reach.
- Prioritize the messages that each audience sees as beneficial.
- Determine what communication methods make the most sense.

When choosing the people or groups the MLS wants to influence, it may be helpful to think about how they can be described or differentiated. For example, the needs of a long-term broker are distinctly different from a new agent.

The more clearly each audience is defined, the easier it will be to make choices about which messages make sense, which communications vehicles are most helpful, and what different audiences will consider valuable.



Target Tip: Ask what different audiences know about the organization, how likely they are to respond to certain messages, what delivery methods they prefer, what outside influences may be supporting or distracting to them, and what they really expect from the organization in terms of information, support, and service.

The best communication elevates the conversation, educates an audience, changes behavior, and produces intended outcomes. The more an organization understands its audience, the more likely it will achieve its intended outcomes.

- Determine the objectives of the organization.
- Clearly identify, segment, and prioritize audiences.
- Discover where their needs and the objectives of the organization intersect.
- Create clear, consistent, and memorable messages to meet those needs.
- Deliver those messages using the tools and techniques that make sense.
- Plan for contingencies if the communication doesn't work as expected.

Message Development

Key messages relate to communicating what the MLS is, why it exists, and what products or services it provides. They often help position the organization within the market or solicit specific calls to action.



Four Questions For Message Development

Question 1. What do people say about the MLS?

Question 2. What benefits does the MLS provide?

Question 3. What issues and trends are changing the market?

Question 4. What communication challenges are occurring?

Focus on what you want your members to know, what you want them to do, what benefits they receive by doing it, and what barriers may prevent them from doing it. Communication is very often a critical component to successful customer service.

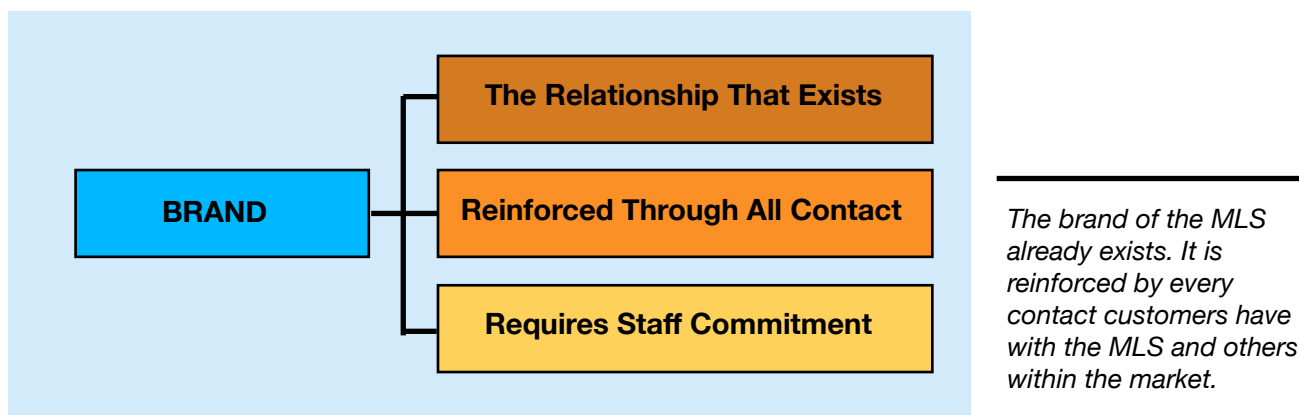
Great communication works to meet several objectives at the same time. It helps define the organization so that customers and other influencers know fundamental messages about the organization and its value. It also maximizes the benefits delivered through its product and service mix. These messages must be clear, concise, and consistent. They must reinforce the same points. They need to be informative and memorable.

Some organizations make the mistake of devising too many complex messages or messages with too many points. The messages are so complex, even the internal team cannot remember what messages are the most important. When internal teams have different messages, it is impossible for customers to know what messages are important. Another mistake made by many organizations is that all messages need to support the overall branding efforts of the organization.

Branding

Whether it is intentional or not, every MLS already has a brand. It is best defined as the relationship the organization has with its customers. It is influenced by everything the community sees and hears about the MLS. This includes how phones are answered, how staff presents itself, how communication materials look, how complaints are responded to, and how the website or mobile app works.

Branding is not just for big corporations nor is it to be confused with logos and graphics (identity). At its core, branding is about establishing meaningful relationships with the customer. A strong relationship leads to trust and loyalty.



Think of the brand as a commitment you make, one that strengthens a relationship with the most important customers. Some people think of a brand as an organization's DNA. It's what makes the organization unique. It sets expectations. It makes a promise. It reinforces the mission and vision. It empowers employees.

Branding doesn't start and stop with new leaders or staff. Every MLS already has a brand. The next step is to build a brand that sets expectations and earns trust, year after year.

Crisis Communication

Sooner or later, every organization faces a crisis. Planning for a potential crisis, whether a system failure or security breach, can mitigate the brand and reputation damage caused by the crisis. Many plans can be developed in as little as eight steps.

1. Assess the situation and collect all pertinent facts: what happened, when did it happen, and why did it happen.
2. Assemble a predefined crisis management team to evaluate the crisis and how the MLS will respond. Schedule follow-ups to ensure consistent communication.
3. Create a comprehensive communications plan for each crisis scenario. It is likely that each scenario will have its own nuances and require a specialized approach.
4. Document the scenarios and protocol so that the crisis team can easily refer back to the plan in a time of need.
5. Designate a spokesperson for a crisis, which is usually determined by the severity of the crisis: A CTO could address a security breach, but a CEO may be needed.
6. Be proactive and authentic with customers, often acknowledging a problem, expressing empathy as warranted, and expressing what will be done to mitigate the issue as well as minimize the chance it will happen again.
7. Have contingencies that include an alternative means of communicating should the normal channels be out of service or if the crisis communication plan fails.
8. Test any crisis plans that are testable, making sure staff understands its roles. Update the plans to make sure to have current contact information for all staff.

For more information about crisis communication, visit the Public Relations Society of America (**PRSA**) and the International Association of Business Communicators (**IABC**) websites. These organizations provide a wealth of other resources available for communication and public relations professionals. In addition, recognize that disaster planning requires similar but different skills beyond communication.

Mitigation. Mitigation focuses on long-term measures to reduce or eliminate risk.

Preparedness. Planning, training, evaluating, and improving activities that ensure proper coordination of efforts.

Response. Includes the mobilization of all necessary staff members and communication efforts during the disaster.

Recovery. Aims to restore those affected to their previous state before the disaster.



PLAN IMPLEMENTATION

Effective marketing implementation starts with effective marketing management. The continued evaluation of marketing strategies and tactics are important aspects of good management. Using simple charts, checklists, or spreadsheets to record the results of any initiative will increase the effectiveness of implementation.

Some simple accountability systems consist of a spreadsheet with the following column headers: date, action, details, cost, person responsible, target completion date, date completed, and resources required. Others also include workflows, calendars, and engagements.

Regardless of the measurement method used, the heart of implementation is in the execution of the plan. The actual “doing” of planned marketing activities is what matters. They require action, management, and follow-up.

- **Coordination.** Who will do what? For example: Determine who is in charge of a task like writing news releases, distributing news releases, and the point of contact. Or, determine who is responsible for website management and who is responsible to update what specific sections.
- **Attention.** Focusing on tasks that need to be done, deciding when and where time is best spent, and staying on top of the progress of various projects is important.
- **Delegation.** Communication and marketing is a shared responsibility. Different staff members can take on certain tasks or some projects may be outsourced to task forces, marketing vendors, or others.
- **Accountability.** The most common reason plans fail is because not every team member is being held accountable for their assigned tasks. Define when all tasks need to be complete, especially those with multiple team members.

MLSs frequently face distractions, which may impact the completion of various tasks. When daily business takes precedent or another project becomes important, make sure the appropriate decisions are made to change priorities and update project schedules. By recording these changes, there are never any surprises as to why something did not get done.

Message Delivery

Direct Mail. Sometimes an MLS may have to turn things around and do something like “thinking inside the box.” Direct mail was once the staple of every MLS. In recent years, direct mail was virtually abandoned. In some cases, however, direct mail offers an opportunity for very personalized and targeted messages placed directly into the hands of the customer. Custom printing fields and audience segmentation can help ensure such communication is opened instead of discarded.

Digital. When member information is collected, capture their preferred method of receiving communication: email, text messages, social media, etc. Sometimes, members will prefer different communication to be sent to them by a different channel. It should also be made clear that the MLS will not share information with others and will guard the privacy of its members. All of this information will require periodic updates as emails and phone numbers change all the time.



Increasing Email Success

- Send email only to those who have requested it.
- Include CAN-SPAM compliant features (unsubscribe).
- Send email on a schedule so they are expected.
- Track analytics for open rates and engagement.
- Consider A/B testing models for subject lines and creative.
- Optimize for mobile and desktop platforms.
- Avoid spam themes or words related to those themes.
- Make sure all email is targeted to the audience segment.
- Create opt-in options for other types of communication.
- Make sure all communication has purpose and value.

Social Media. Using social networks enables an “always-on” opportunity that MLSs have never had available before. To use it effectively, determine which social networks members use and on which the organization desires a presence. Each network may have its own expectations so make sure the person responsible studies the medium. Understand that people expect quick responses whether the communication is private (messages) or public (posts). Monitor in real time.

Content Marketing. Social networks have provided an ideal space to share, comment, and engage. By creating content with those qualities, MLSs can share materials that add value for their members and further organization goals. The network sometimes makes a difference. Twitter, for example, is well suited for graphics, memes, fun moments, and article sharing. LinkedIn, on the other hand, is generally more business oriented and formal. Likewise, different networks have different algorithms that determine which posts get seen, and accounts such as Facebook can be penalized for sharing content that doesn’t conform to those rules.

Great content mixes usually include a variety of communication:

- Visual, audio, and written content (infographics, reports, etc.).
- Great stories about customers or the organization.
- Covering items that MLS customers are already talking about.
- Curation of great content from other pages, websites, stories, etc.

Two-Way Communication. Consider the customer and create communication that pulls and draws people in. This may include engaging people in a live discussion about a specific topic or something as simple as considering Search Engine Optimization (SEO) so they can find what they are looking for when they need it.

Marketing Campaigns. Different communication elements can be coordinated together to promote MLS activities online and offline. By including several delivery methods around central objectives, MLSs can promote events or training.

- Online contesting that meets any legal rules that may apply.
- Coupons for live events that are only offered on social channels.
- Social media advertisements that reinforce other communication.
- Encouraging audiences to share information or news items.
- Creating a hashtag that organizes conversation and reaches other people.

Measure the results of the campaign to discover what is working.

- Track SEO keywords, influencers, key drivers, social shares, hashtags, etc.
- Ask staff to use the correct campaign tracking tools to capture all data.
- Create and share weekly reports during the campaign to encourage staff.
- Based on metrics and results, adjust the campaign in real time.

The larger the marketing mix, the more likely customers will see and respond to the campaign. Just remember that all campaigns should deliver on customer value.

Websites. The first place most people look for information is the Internet. It is helpful for an MLS to keep some fundamental rules in mind for the MLS website.

- People tend to scan more than they read.
- Clearly organized and easy to navigate sites work better.
- Robust search functions help people find what they need.
- Most sites have savvy and useful tools, not just information.
- Short load times and browser and operating system compatibility are a must.

Maintaining an MLS website is just as important as creating it in the first place. Always add new content regularly. It may be easy to make corrections on a site, but if the MLS site is littered with errors, then it can make users lose confidence. There's little credibility in a website that never changes.



Utilizing a Content Management System (CMS) to help keep the MLS site current is beneficial. A CMS makes it simpler for those unfamiliar with HTML to post and update materials without assistance from the technical staff. Some CMSs include tools that can help anyone make all new content search engine friendly.

For MLSs that have a public facing website, SEO is especially important. SEO describes the procedures used to optimize or design from scratch a website to rank well in search engines. This includes processes such as relevant keywords and phrases, editing tags, image tags, metadata, and other components. SEO helps search engines access and index all of the content on a website.

- **Optimize social network profiles.** Fill out the 'about' or 'information' sections of any social media platform with words or phrases that can be indexed by search engines. The "category" field, for example, is often overlooked on Facebook pages.
- **Optimize social network content/updates.** To optimize social content, always include some of the relevant search keywords. By using the MLS's name in social posts, it will help Google associate keywords used to describe the MLS.
- **Build links by making MLS content shareable.** When people share or link content, search engines begin to recognize the site as a trusted source of information. Always remember that paying for such links or offering other incentives will be penalized.

Improving SEO takes time. Changes do not happen overnight. Keep in mind that the focus should always place the customer experience first. Word-of-mouth is often more powerful than search engine indexing, especially for an MLS.



Building Better Sites

Website Best Practices

- Reinforce brand identity
- Link materials visually
- Add social network buttons
- Express consistent messages
- Employ targeted messages
- Maintain fresh content on the site
- Optimize for Internet search engines
- Collect visitor email address
- Remain ADA compliant

Website Pitfalls

- Using generic templates
- Neglecting keywords
- Not listing social networks
- Uploading images with generic names
- Duplicating another site's content
- Using different names in different places
- Not customizing the Facebook url
- Never updating the site with next content
- Neglecting the needs of mobile users

Measuring Milestones

Quantifying the influence and outcomes of MLS marketing and communication efforts can be difficult. The first step is to recognize what different elements of the campaign might be trying to accomplish. Once those measurements are defined, it will be easier to understand what is working and what needs to be improved. There are a number of tools and techniques that will help MLSs measure outcomes.

Points of Interruption. Surveys are one way to tell what MLS customers think of the quality and frequency of each publication. An MLS might ask how much was read, whether it was shared with colleagues and clients, or if it motivated someone to take action. Performance analytics and analyzing engagement metrics, when available, can also be helpful in better understanding outcomes.

Website Analytics. It can be very easy to count hits on an MLS website, but harder to know what hits actually mean. Make sure the data is analyzed rather than just collected. (Is time on site high because people value the content or is it because people can't find information they need?) Look at other usage patterns, including peak usage times and what information people are accessing most.



OUTSOURCING PROJECTS

Depending on the size and skill sets of the MLS, certain marketing and communication aspects might not be right for the organization. There is nothing to be concerned about.

Good communication management requires prudent fiscal management, with the executive team considering cost-benefit ratios of the work, projects, or plan. In some cases, it may be worthwhile to outsource some or all the organization's communication and marketing needs. Some MLSs outsource specific projects (a website or product rollout campaign) and others hire marketing and communication firms to manage the entire program.

Even if an MLS wants to outsource its entire program, answering some questions can help set the expectations for the MLS and the vendor. Prior to sending out a Request For Proposal (RFP), executive leaders should define the mission and vision of the organization, determine which audiences are the most important, decide what needs to be communicated, how the communication will likely be delivered, and the frequency of supporting messages. It may help to develop a master calendar that includes any events, training, or other dates related to the products and services the organization offers.

Building the RFP. Once questions above are answered, the MLS can include it as an overall statement of work or define a scope of work that relies on that information for direction. Once complete, ask select vendors for the following information:

- Information about the company, including leadership and any staff assigned
- Relevant experience working with MLSs or closely related organizations
- Samples of work that illustrate the type of the communication they've produced
- Public relations experience, including any publications they think is relevant
- Referrals from organizations and leaders within real estate or closely related fields
- Estimated cost and delivery schedule, depending on the scope of work solicited

If the organization has a budget, it can sometimes save time by providing that information.



CONCLUSION

The best way for an MLS to maximize marketing and communication efforts is to recognize that the primary function of these activities is to provide more customer value.

By delivering more value to MLS customers, the MLS will strengthen the relationship between the organization and its customers. In addition, the organization may also want to develop communication that reaches other audiences, especially those that may influence their customers by way of policy, public outreach, or participation.

In either case, this requires the organization to have a clearly defined mission, vision, values, and strategic objectives. It must also leverage in-house or outsourced knowledge about the strategies and tactics to support those objectives, the needs of various audiences, and any real and perceived opportunities and threats facing the organization.

By doing so, the organization will be better able to continually implement timely communication to the right audiences, thereby earning trust and a solid reputation. This is especially important for MLSs as a fundamental part of the MLS value proposition to build a better marketplace. This can be accomplished by following the sections outlined herein.

- Establish goals, objectives, and needs
- Define internal and external audiences
- Determine strategies, tactics, and techniques
- Develop messages that reinforce customer value
- Outline the timing and frequency of those messages
- Test plans for disaster management and crisis communication

There are several more supplements that can help bring an MLS up to speed on closely related topics. By following these best practices, an MLS is making a conscious effort to step up and become identified as a best-in-class organization. As you accomplish this goal, CMLS will continue adding new resources that help move the industry forward.

APPENDIX A

MARKETING PLAN SAMPLE

I. Executive Summary

ABC MLS is an innovative organization dedicated to supporting its members' professional needs and representing them within the industry. Its ongoing vision is to create a large, but united group of collaborative professionals. In order to continue growth and bolster the current members, ABC MLS will focus on [detail marketing objectives].

ABC MLS was formed {X} years ago and has been providing exemplary service to its members ever since. [Detail history, annual sales figures, and tactics.]

Along with a supportive staff of trained professionals, ABC MLS provides [list and describe products and services offered].

The management team is comprised of [introduce management team]. The MLS is organized by [department, stakeholders, and professionals].

II. Product Description

ABC MLS provides support for its members through educational resources, training, and technology. It offers innovative real estate solutions to real estate professionals while remaining aware of and involved in emerging trends.

The in-house support team creates and maintains an extensive database of self-guided educational materials. It also provides in-person training, online education, and a customer call center. ABC MLS also facilitates vendor relationships to provide its members with the best technology available at the most affordable prices. [And so on...]

ABC SWOT

Strengths	Weaknesses
<ul style="list-style-type: none"> • Strong leadership and representation • Extensive training materials • Award-winning service • Access to technology 	<ul style="list-style-type: none"> • Communication for ABC MLS members who practice real estate part time is limited/infrequent
Opportunities	Threats
<ul style="list-style-type: none"> • New initiatives, market forces, etc., can allow ABC MLS to bolster its status as a trusted source of information • New wave of members appreciate technology and collaboration 	<ul style="list-style-type: none"> • Widespread consolidation • Shift in prevalence of buying/selling without the help of a licensed real estate broker or agent • Delayed first-time home ownership by Millennials

III. Environmental Scan

ABC MLS offers annual or quarterly membership at different tiers and price points [specifics]. Ongoing recruitment is a priority and is achieved by the following [plan].

Customers typically join an MLS in order to access the information and tools they need to work effectively and cooperatively. They do, however, have a choice in which associations to join so providing the services and features they need will help ABC MLS to be competitive. [Describe customer requirements and demands].

In order to meet these needs, currently ABC MLS has had success with... [describe current plan]. Conversely, ABC MLS did not see positive returns from [past marketing strategies that were less successful].

Reference the financial results below to substantiate the aforementioned findings.

Marketing Activity	ROI	Profit Margin

IV. Target Audiences

The primary audience for ABC MLS is comprised of full-time practicing real estate professionals within 90 minutes of the [X] office. [Describe primary market demographics, psychographics, etc.]

Describe secondary audience demographics, psychographics, etc. here and reassess whether these audiences are too limited/broad.

IV. Marketing Goals And Strategies

Goal. To increase membership by 3 percent annually.
[Describe the goal and identify it as short or long term.]

Strategy.
[Describe specific steps that will be taken to achieve the goal.]

Goal 2.
[Describe the goal and identify it as short or long term.]

Strategy 2.
[Describe specific steps that will be taken to achieve the goal.]

V. Action Plan

The following plan will be implemented in order to achieve the aforementioned goals.

Marketing Events

- 1.
- 2.
- 3.

Marketing Tools

- 1.
- 2.
- 3.

VI. Financial Projections

Marketing Activity	Purpose	Projected Outcome	Timeline	Associated Costs

VII. Marketing Calendar



APPENDIX B

SAMPLE SWOT GUIDE

STRENGTHS	MY COMPANY	COMPETITORS (IF APPLICABLE)
What are your business advantages?		
What are your core competencies?		
What products best achieve customer satisfaction?		
If applicable, where are you making the most money?		
What are you doing well?		
Weaknesses		
What areas are you avoiding?		
Where do you lack resources?		
What are you doing poorly?		
Where are you losing money?		
What needs improvement?		
Opportunities		
Any beneficial trends?		
Niches that competitors are missing?		
New technologies?		
New needs of customers?		
Threats		
Obstacles to overcome?		
Aggressive competitors?		
Successful competitors?		
Negative economic conditions?		
Government regulation?		
Changing business climate?		
Vulnerabilities?		

APPENDIX C

COMMUNICATION QUESTIONS

I. What is the issue to be addressed?

- Describe the problem or issue that the communication plan will address.

II. What are the goals to be achieved?

- Why communicate?
- What do we want people to do as a result?
- What do you want to get out of the communications plan?
- What changes in policy or behaviors are desired?

III. Intended audience(s)?

- Who is your primary target audience?
- Who are some secondary audiences?

IV. What message(s) do we want to communicate?

- What is the main message(s) we wish to communicate?
- What are secondary messages?
- How will these messages be adapted for different audiences?
- What key points should be highlighted with the media?
- How do you want the issue to be described and what is the solution?

V. What communication tools and techniques will be used?

- What tools are you using to spread the messages?
- Website? Newsletters? Emails? Tours? Speaking engagements? Forums? Mailings?
- Are there other outlets for communicating with specific audiences?
- What is the timeframe of the communication?
- What are the intermediate deadlines for individual activities?

VI. What relevant research is available?

- What data clearly illustrates the issue?
- What case studies or illustrations put a human face on the issue?
- What makes the data compelling, locally based and evoke emotion?

VII. What activities, publications, events, and media are planned?

- What activities will be the most effective?
- Which priorities need to be considered to maximize results?

VIII. What resources will be required?

- How much funding is required?
- What skills will be necessary?
- How much staff time will be invested?
- Will any portion of the initiative be outsourced?

IX. Who has primary responsibility?

- Who are the collaborators, helpers, supporters?
- Who has responsibility to make sure everyone is on track?

X. How will you evaluate the outcome of the communication?

- How many people were reached?
- Who was reached and how did they respond?
- Were there any positive actions taken as a result of efforts?
- What did the media or other influencers say about the communication?
- Is there going to be a post-campaign survey? If so, what is it?
- Are there any quantitative numbers from social networks to include?

XI. What other elements might be helpful?

- Calendar of events or activities?
- List of spokespeople to refer?
- Feature stories that support other media efforts?



APPENDIX D

BEST PRACTICES CHECK LIST

MARKETING AND COMMUNICATIONS	YES	NO	COMMENTS
Product Development			
MLS maintains responsibility for the research, implementation, integration, and marketing of all products and services to customers			
Process focuses on the value for the customer			
Qualitative and/or quantitative research is conducted using various research tools; e.g. phone calls, meetings, surveys, focus groups, etc.			
Marketing Audits			
Marketing audits are conducted periodically to review and appraise success of marketing activity			
Communications Audits			
Internal and external communications are audited to determine effectiveness			
Standard identity pieces are reviewed; e.g. logo, signage, letterhead			
Promotional pieces from flyers, training materials to news coverage are evaluated			
A SWOT (strengths, weaknesses, opportunities and threats) analysis has been performed			
A plan for future communications has been developed based on results of audit			
Creating A Marketing Plan			
Marketing plan includes product development, pricing, sales, customer service, branding, research, stakeholder communications and public relations			
Marketing plan focuses on fulfilling customer needs			

	YES	NO	COMMENTS
Executive Summary			
Marketing plan includes a brief executive summary			
Product Description			
Plan includes description of the product(s) included in the plan			
A <i>SWOT</i> (strengths, weaknesses, opportunities and threats) analysis has been developed			
Include an environmental scan of the current market (product, pricing, distribution) and activities			
Develop a profile of primary and secondary target markets			

Goals and Objectives	YES	NO	COMMENTS
Define the goals and objectives of the plan focused on the mission of the MLS, include short and long term goals			
Define Marketing Strategy			
Identify and define the strategy to be used to achieve the goals ensuring the strategy meets the needs of the customers			
Develop the Action Plan			
Define the marketing events to be used for the year			
Identify tools needed to reach the market, including advertising, public relations, sales, etc.			
Define how tools will be used for each specific program, associated costs and frequency of use			
Financial Projections and Budget			
Include all expenses and projected revenues for the project			
For each component of the plan outline the revenue objective and projected outcome include an itemized list of all costs			
Consider financial impact of a change in the timeline of each component of the plan			

	YES	NO	
Communication Portion			
Include the mission statement and overall strategic direction			
Develop specific, measurable communication goals			
Analyze and clearly identify target customers			
Develop clear and memorable messages			
Ensure messages are consistent across all communication vehicles, including training and support			
Branding			
Recognize a brand exists and utilized its advantage			
Utilize brand in communication and services			
Ensure staff understands and is committed to the brand			
Crisis Communications			
Have a crisis communication plan			
Designate a spokesperson			
Define alternative communication channels in the event normal channels are unavailable			
Test the plan to ensure fast and effective response			

APPENDIX E

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