



VANGUARD REALTY

**STEP BY STEP  
INSTRUCTIONS  
TO CBV  
MARKETING  
MATRIX  
SUCCESS**

**VANGAURD REALTY  
MARKETING MATRIX  
USERS MANUAL  
BUSINESS RULES**

**INTRODUCTION**

The Marketing Matrix is a revolutionary process that saves agents valuable time and allows them to set reasonable marketing goals for Programs that can last up to twelve months. The Matrix enables agents to plan their marketing for an entire twelve-month period and have it delivered to their audience without constantly revisiting and reordering their marketing. The primary goal of the Matrix is to help the agent be consistent in their marketing efforts to specific audiences.

The Marketing Matrix is comprised of Programs. A Program can last anywhere from three weeks to twelve months. An agent can select multiple Programs to reach different markets. The Marketing Matrix will compute the cost of each program and allocate the cost over a twelve-month period, even if the Program is only going to run for three weeks. The Marketing Matrix will then combine all of the Programs and deliver a set monthly cost. The cost is variable throughout the term due to changes in the quantity of the products ordered.

When the Marketing Matrix has been established most of the agent's work has been done and the major responsibility the agent has is to review the addresses for the Program. By focusing on specific markets, the agent has the ability to develop those markets in a business-like way without the constant work required throughout the year to be consistent.

The Matrix offers programs of different durations and the agent can select among the numerous offerings to build a program that meets their needs and is affordable. The length of the programs are:

- 3 Weeks
- 6 Weeks
- 3 Months
- 6 Months
- 12 Months

**BUSINESS RULES**

By its very nature this is a complete program in its implementation and as the agents requirements change over a twelve month period, Business Rules have been put in place to help the agent have the best possible experience and greatest success.

## Production

**All products set for delivery in a month must be approved by the agent no later than the 15<sup>th</sup> of that month.** Products that have not been approved by the agent by the deadline are scheduled for production and delivery in the month after they have been approved by the agent. All printers require their customers to approve a “proof” prior to printing, when the customer approves the proof any errors are the responsibility of the customer. Concierge Service and the Marketing Matrix follow the same requirement.

## Mailing Lists

The agent must decide whether to use a personal mailing list or one provided by Concierge Service. **If the agent is using their personal list it must be uploaded in proper form no later than the 15<sup>th</sup> of the month of the mailing.** Directions for presenting the list in proper form are located in the User’s Manual portion of this document. List requests from Concierge Service must be made prior to the 10<sup>th</sup> of the month of mailing.

## Quantities and Quantity Changes

When a product is ordered through the Matrix the agent provides a quantity and the Matrix determines a price based on the quantity submitted. When products are created through the Matrix the actual quantity is determined by the count in either the agent’s submitted list or the list created by Concierge Service. The quantity invoiced to the agent is the quantity produced, not the quantity submitted.

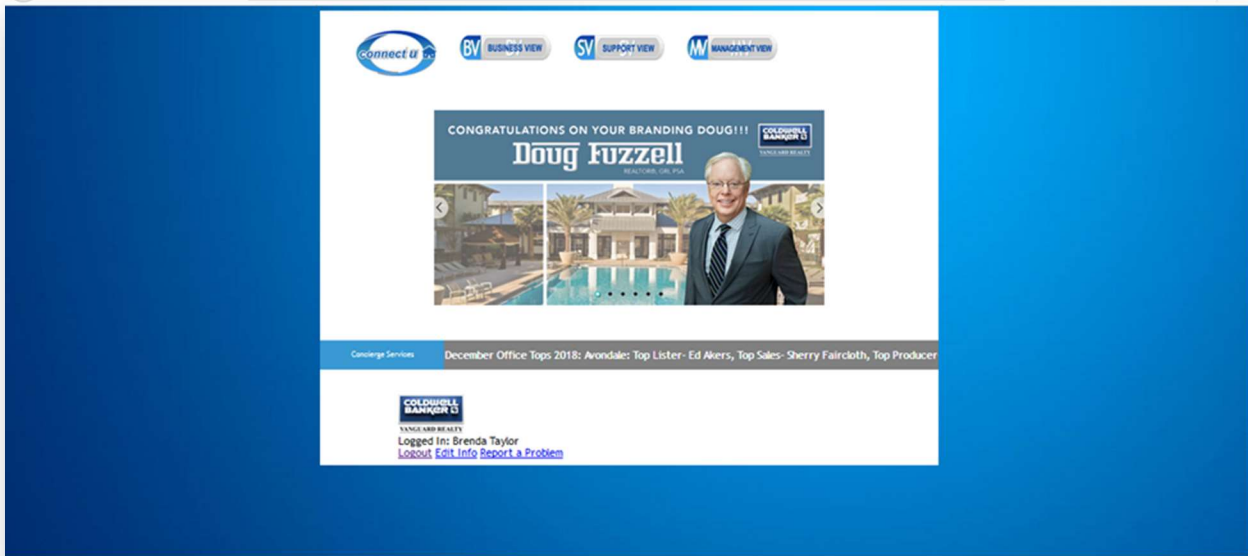
Increases in quantity may be made at any time, within the Mailing List rules. The increase will be computed by the Matrix and the new amount allocated over the remaining periods in the Matrix (If three months have elapsed and there is an increase in quantity the matrix will allocate the increased cost over the remaining nine months of the program).

Reductions in quantity are much more difficult because the Matrix cannot reallocate costs over the remaining term of the product. A reduction in quantity requires the end of the present Matrix and the creation of a new Matrix. **For this reason, reductions in quantity are only available every ninety days.** If your program is for longer than ninety days you will be notified, by email, when the opportunity to reduce quantity is available. You will have a fifteen-day window to reduce the quantity. **The window will start at the beginning of the third month of the quarter and end fifteen days later at the 15<sup>th</sup> of the month mailing list deadline.** This period is open every ninety days.

## Invoicing

All Matrix programs are invoiced over a twelve-month period, even if the program is of shorter duration.

Invoicing for Matrix programs begins on the first of the month following the delivery of the product. i.e. A program started in February is invoiced for twelve consecutive months, starting in March. This, in essence, provides the agent with 13 months to pay for the program.



## Welcome to the CBV MATRIX!

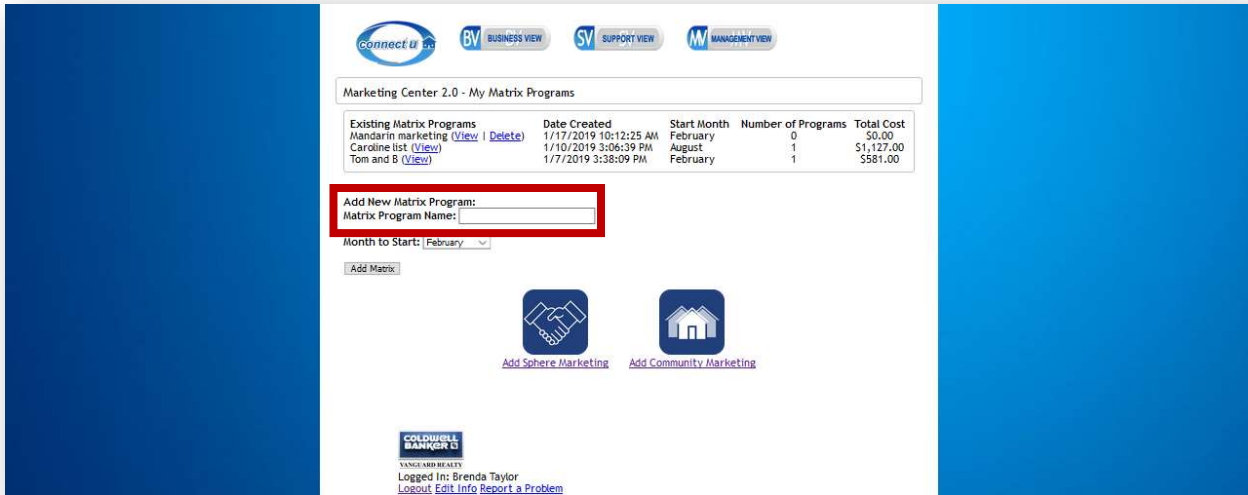
The CBV Matrix marketing Program is conveniently located in the ConnectU Marketing Center.

Start by logging in to Connect U.

Enter the Marketing Center.

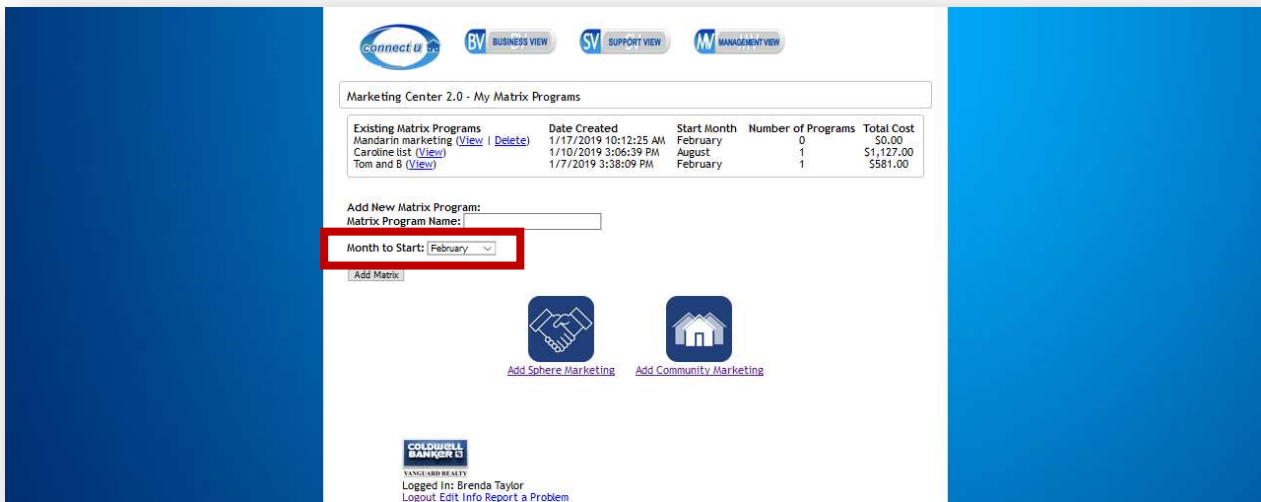


Locate the My Matrix Programs link shown above.



The first step required to participate in the Matrix is to create a Matrix for your 12-month Program. You will see the location shown above where you will add the Program name. Name the Program with a detailed description. This will make your planning easier to navigate.

Example: Sphere marketing 2019 - Bowling league marketing - Neighborhood farming with community name - My A-list.



Select the start month for your Matrix Program.

connect@connect.com BV BUSINESS VIEW SV SUPPORT VIEW MW MANAGEMENT VIEW

Marketing Center 2.0 - My Matrix Programs

Existing Matrix Programs	Date Created	Start Month	Number of Programs	Total Cost
Mandarin marketing <a href="#">View</a> <a href="#">Delete</a>	1/17/2019 10:12:25 AM	February	0	50.00
Caroline list <a href="#">View</a>	1/10/2019 3:06:39 PM	August	1	\$1,127.00
Tom and B <a href="#">View</a>	1/7/2019 3:38:09 PM	February	1	\$581.00

Add New Matrix Program:  
Matrix Program Name:

Month to Start: February

**Add Matrix**

[Add Sphere Marketing](#) [Add Community Marketing](#)

**COLDWELL BANKER**  
SUNSHINE REALTY  
Logged In: Brenda Taylor  
[Logout](#) [Edit](#) [Info](#) [Report a Problem](#)

Then hit the Add Matrix button.

connect@connect.com BV BUSINESS VIEW SV SUPPORT VIEW MW MANAGEMENT VIEW

Marketing Center 2.0 - My Matrix Programs

Existing Matrix Programs	Date Created	Start Month	Number of Programs	Total Cost
Mandarin marketing <a href="#">View</a> <a href="#">Delete</a>	1/17/2019 10:12:25 AM	February	0	50.00
Caroline list <a href="#">View</a>	1/10/2019 3:06:39 PM	August	1	\$1,127.00
Tom and B <a href="#">View</a>	1/7/2019 3:38:09 PM	February	1	\$581.00

Add New Matrix Program:  
Matrix Program Name:

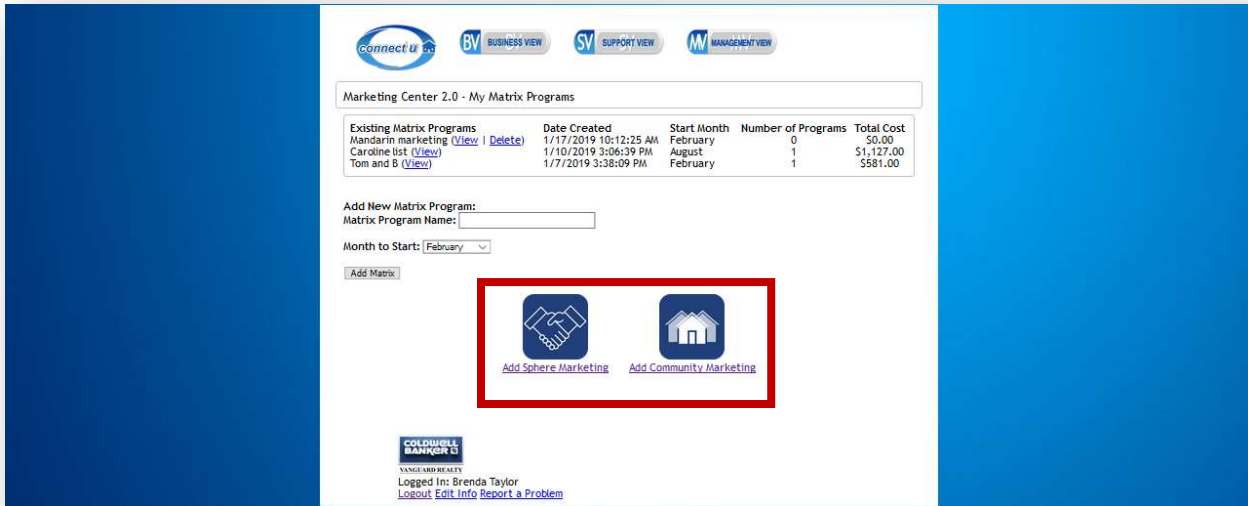
Month to Start: February

**Add Matrix**

[Add Sphere Marketing](#) [Add Community Marketing](#)

**COLDWELL BANKER**  
SUNSHINE REALTY  
Logged In: Brenda Taylor  
[Logout](#) [Edit](#) [Info](#) [Report a Problem](#)

The new Matrix will now show in your existing matrices.

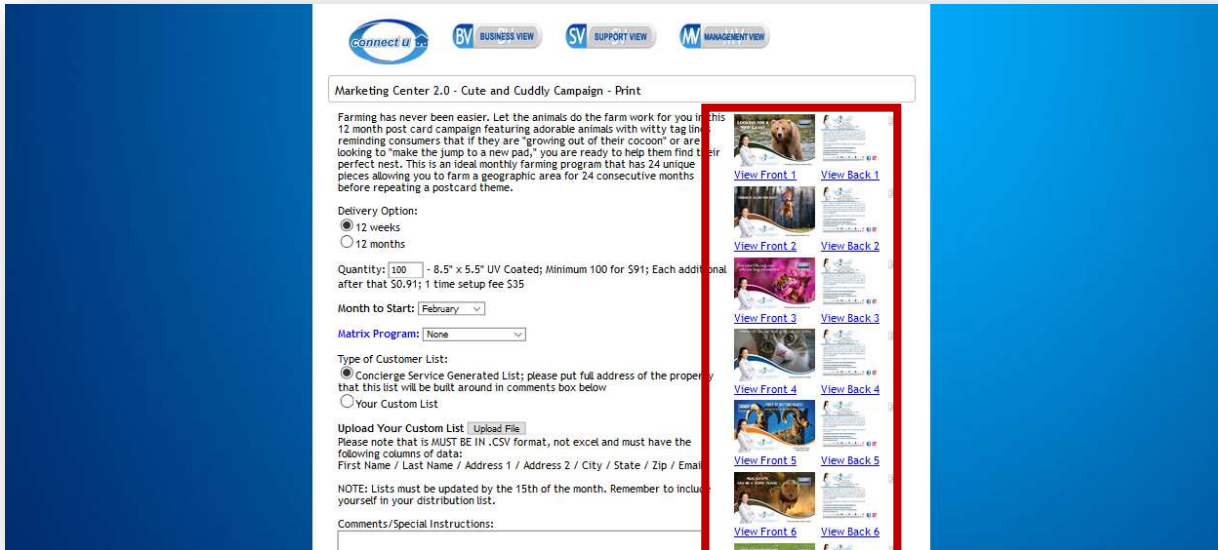


You have now created a Matrix Program and can proceed to order marketing products for your 12-month plan.

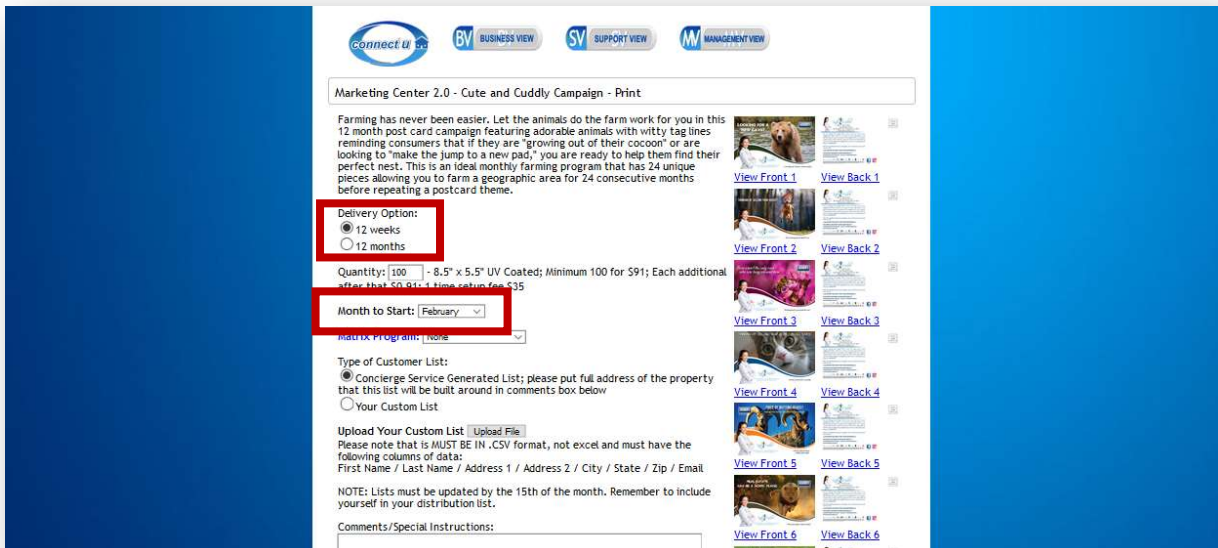
Start by selecting Sphere Marketing products or Community Marketing products by clicking the icon shown.



These links will take you to products exclusively design for Coldwell Banker Vanguard Realty agents. Each product will have a description of when and how to use the materials to reach your valued customers or selected farm area residents.



When you select the order button you will be redirected to an ordering page that has an overview of the Program. A full-size PDF of the product is available for your review.



When selecting a product there are several things you must include. First is the delivery option. This will indicate the frequency of product delivery. Then you will select the quantity. Then you will select a starting month.



The next step is VERY IMPORTANT! In order for your marketing expense to be allocated over a 12-month period, you must attach your product to an existing Matrix. The drop-down will show you all available matrices. Select the correct one and move on to the next step.

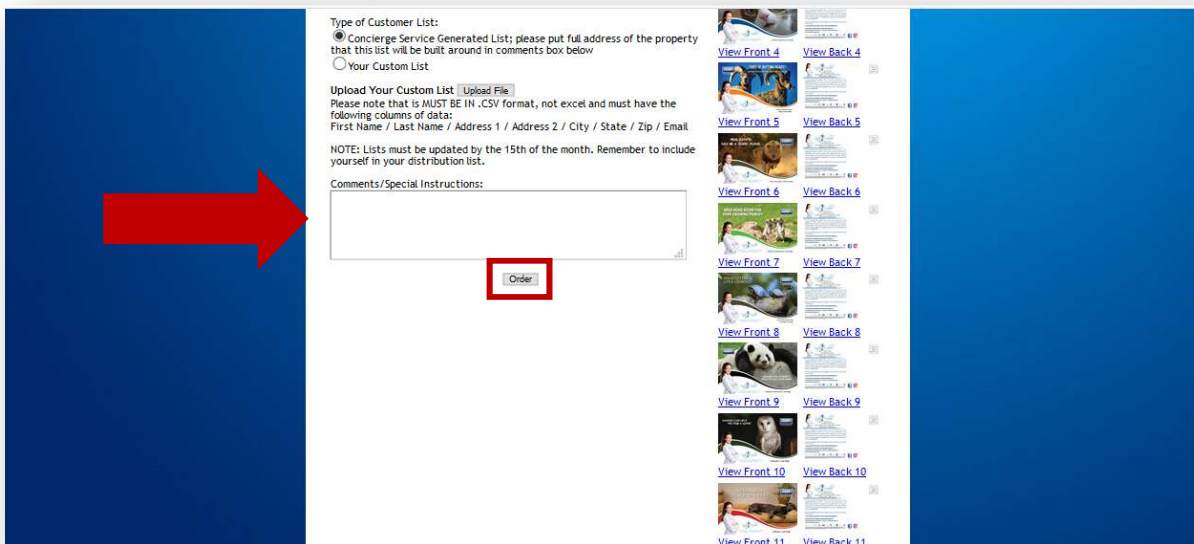


Here you will decide whether to upload a custom list or allow Concierge Service to pull a geographical list for distribution. When selecting the Concierge Service generated list, please be sure to add a property address in the comments box. Concierge Service will pull the distribution list and send you the spreadsheet when your proofs have been created. This will allow you to review the streets and addresses where your marketing will be delivered.



Custom lists: Ensure your list is in the correct required format and uploaded here. Please note that list MUST BE IN .CSV format, not excel, and must have the following columns of data:

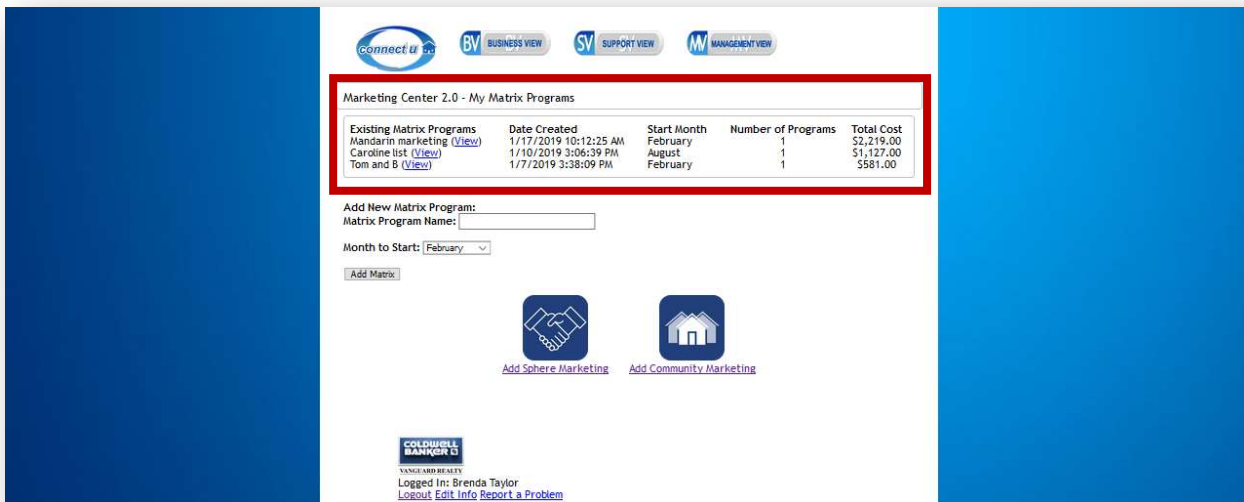
First Name / Last Name / Address 1 / Address 2 / City / State / Zip / Email



Communication with Concierge Service about headshot preferences, team preferences or additional requests can be added to the comments box. The final step is to hit the order button. Congratulations you have now created your first marketing matrix!



Return to the Marketing Center where you first started your Matrix Program. Click on My Matrix Programs.



You will see a list of all existing matrices.

Marketing Center 2.0 - Matrix Program - Mandarin marketing

Matrix Program: Mandarin marketing  
 Date Created: 1/17/2019 10:12:25 AM  
 Start Month: February  
 Number of Programs: 1  
 Total Cost: \$2,219.00

Program	February 2019	March 2019	April 2019	May 2019	June 2019	July 2019
Cute and Cuddly Campaign - 12 weeks	Cost: \$184.92 Qty: 200	Cost: \$184.92 Qty: 200	Cost: \$184.92 Qty: 200	Cost: \$184.92 Qty: 200	Cost: \$184.92 Qty: 200	Cost: \$184.92 Qty: 200
<b>Monthly Total</b>	\$184.92	\$184.92	\$184.92	\$184.92	\$184.92	\$184.92

Manage Customer Lists:  
 Cute and Cuddly Campaign - 12 weeks  
 Concierge Service Generated List; please put full address of the property that this list will be built around in comments box below

[Return To My Matrix Programs](#)

This is where you can view the Programs that have been ordered. You can also see the monthly rolling expense for the marketing plan you have in place.

Marketing Center 2.0 - Matrix Program - Sphere Marketing 2019 - RMyers

Matrix Program: Sphere Marketing 2019 - RMyers  
 Date Created: 12/27/2018 3:39:12 PM  
 Start Month: January  
 Number of Programs: 4  
 Total Cost: \$1,992.56

Program	January 2019	February 2019	March 2019	April 2019	May 2019
Quarterly Letter Program - Print	Cost: \$23.43 Qty: 71	Cost: \$23.43 Qty: 71	Cost: \$23.43 Qty: 71	Cost: \$23.43 Qty: 71	Cost: \$23.43 Qty: 71
<b>Total Cost: \$281.16</b>					
TLC The Loyalty Campaign	Cost: \$63.75 Qty: 51	Cost: \$63.75 Qty: 51	Cost: \$63.75 Qty: 51	Cost: \$63.75 Qty: 51	Cost: \$63.75 Qty: 51
<b>Total Cost: \$765.00</b>					
Refer Me Postcards - Quarterly - Option 1	Cost: \$48.53 Qty: 160	Cost: \$48.53 Qty: 160	Cost: \$48.53 Qty: 160	Cost: \$48.53 Qty: 160	Cost: \$48.53 Qty: 11
<b>Total Cost: \$582.40</b>					
Refer Me Postcards - Quarterly - Option 1		Cost: \$30.33	Cost: \$30.33	Cost: \$30.33	Cost: \$30.33

Manage Customer Lists:

- Quarterly Letter Program - Print [View List](#) | [Upload Updated List](#)
- TLC The Loyalty Campaign [View List](#) | [Upload Updated List](#)
- Refer Me Postcards - Quarterly - Option 1 [View List](#) | [Upload Updated List](#)
- Refer Me Postcards - Quarterly - Option 1 [View List](#) | [Upload Updated List](#)

[Return To My Matrix Programs](#)

Under each Matrix you will be able to see the custom lists (if applicable) attached to your Programs. You will have the option to upload a new updated list as outlined in the Matrix Business Rules.

Congratulations! Enjoy using the CBV Marketing Matrix!