How to Create Groups and Assign Prospects to a Group

Why should I put prospects into groups?
In today's market, internet consumers see hundreds of marketing messages every day. For you to distinguish yourself from your competition and successfully convert more of your prospects into clients, it's very important to tailor your marketing to the specific needs and interests of your prospects.

To do so, you can organize your prospects into groups such as investors, first time home buyers, and seniors. Using this group strategy will enable you to quickly identify prospects to target at key moments in your business development (such as an open house or new listing) so you can capture their attention and win their business.

Which groups should I create?
To identify groups you'll use, answer the questions below. Then identify group labels that you're most likely to use. You can have up to 25 groups total.

- Who will I want to contact? (e.g., investors, first time home buyers)
- When will I want to reach out to my prospects? (e.g., when I get a new listing, host an open house, teach a class)

How do I group prospects?
Go to your **Prospects** or **Contacts** page.

- Login to your Market Leader system.
- Click on **Prospects** or **Contacts**. (It will vary based on the system you're using.)

Create a group.

- In the top right corner, click on **Manage Groups**.
- In the Create New Groups box, type the name of the new group.
- Click **Save**.

Locate the target prospects.

- Click on **Prospects** to return to your primary Prospects screen.
- Here are three strategies you can use to find the prospects you want to add to the group:
    - Click on the **Status** drop down menu to select prospects based on their buyer status, or
    - Enter prospects' names and click the **Find Prospect** button, or
    - Double click on any column heading to sort by prospects' details.
- Once you have the desired prospects on your screen, you're ready to add them to a group.

Add prospects to the group.

- Check the box to the left of each prospect you'll add to the group.
- Below the list of prospects, click **Add Groups**.
- Check the group(s) to which you want to add these prospects.
- Click the **Add** button.
- Your prospects are now in a group!

You can also add an individual prospect to a group from the prospect's profile page.

- Click on the prospect's name to go to the prospect's profile page.
- Scroll to the bottom of the profile page.
- Click on **Groups**.
- Here you can create a new group by typing in the group name and clicking **Create**.
- To add this prospect to a group, click **Add Groups**.
- Check the group(s) to which you want to add the prospect.
- Click the **Add** button.
- Your prospect is now a member of this group!

How do I find prospects in my groups?

- In the navigation pane, click on **Prospects**.
- Find the Groups drop down menu above your list of prospects. Click on the drop down arrow.
- Click in the box(es) to the left of the group(s) you want to view.
- Click anywhere on your Prospects page.
- Your screen will refresh and you'll see all the prospects in the group(s)!

How do I remove prospects from a group?

- Follow the above instructions to view all the prospects in a particular group.
- Click in the box(es) to the left of the prospect(s) you want to remove from the group.
- At the bottom of your prospect list, click **Remove Groups**.
- Click in the box to the left of the group from which you want to remove the Prospect(s).
- Click **Remove**.
- Your prospect(s) are removed from the group!

How do I change the name of a group?

- In the navigation pane, click on **Prospects**.
- In the top right corner, click on **Manage Groups**.
- In the list of group names, find the name of the group you want to change.
- To the right of the group, click on the **Edit** icon.
- In the New Group Name box, type the new name for your group.
- Click **Save**.
- Your group name will be updated and all the prospects in that group will now have the new group name!