



Lead Generation in CRS Data — Quick Start

Search strategies, data exports, Excel tips, and AI-powered outreach.

CRS Data is more than a way to print mailing labels. With the right filters, a targeted export, and a little help from AI, you can build a hyper-personalized outreach system that reaches the right homeowners with a message that actually gets read.

1. Getting Into CRS Data

There are two ways to open CRS Data. Use whichever you have in front of you:

- **From the Hive MLS dashboard:** click the CRS Data tile.
- **From inside FlexMLS:** click Menu (upper left) → CRS Prospecting.

 **Honey Tip:** Before your first prospecting session, go to Settings and do two things: fill out your branding (photo and contact info) so it appears on everything you create, and set your Default County Search to the counties you work. You can add up to 4. This loads them automatically on every search.

2. Initial Settings — Do This Once

Two minutes here saves time on every session after.

- **Branding:** Upload your photo and fill in your contact information. This appears on labels and any materials you generate.
- **Default County Search:** Select up to 4 counties. They will pre-load automatically on every prospecting session so you do not have to re-enter them.
- **Save Results:** After completing a search you like, click Save Search Criteria and give it a clear name (e.g., “Appreciation Wake-Up – Near Water NC”). Next time you want to prospect a new area, load the saved search, delete the existing map shape, and draw a new polygon somewhere else.

3. Labels vs. Exporting — Two Approaches

After you run a search and draw your map shape, you have two ways to act on the results:

Approach	How It Works	Best For
Create Labels	Generates mailing labels (Avery-style) as a Word doc. Print and apply to postcards or envelopes.	High-volume spray-and-pray campaigns. All it takes is one response to pay for the whole run.
Export Data	Downloads a CSV with owner names, addresses, sale history, and appraised value. Analyze in Excel, then write targeted letters.	Targeted outreach with personalized details — equity amount, price difference, owner state. More work up front, but letters get read.

 **Honey Tip:** Postcards get thrown away. Handwritten or personalized letters get opened. If you take 20 extra minutes to export data, calculate each homeowner's possible equity gain, and reference that specific number in a letter, you immediately stand out from every other agent sending generic mailers.

4. Creating Labels

1. **After running your search and drawing your map shape, click Create Labels.**
2. **Choose owner address (recommended) or property address.** If the owner lives elsewhere, always use their mailing address.
3. **"Current Resident" option:** most agents skip it. If something says "Current Resident," most people don't read it.
4. **Always select Word Document — not PDF.** Word lets you fix typos or remove addresses before printing. A PDF is locked.
5. **Click Create Labels. Print on the correct Avery label paper.**

5. Exporting Data — The Right Way

The plain Export button gives you fewer fields and skips Appraised Value entirely. Always go through Edit Fields.

6. **After running your search, click Export.**
7. **Do NOT click the top Export button directly.** Click Edit Fields instead.
8. **In Edit Fields, make sure Appraised Value is checked.** Uncheck any fields you don't need — fewer columns makes the spreadsheet easier to work with.
9. **Click Export. You will get a CSV file with more complete data.**

 **Honey Tip:** You have 5,000 exports per month. Use them generously to experiment with different areas and filters. When learning, draw smaller map shapes to keep results manageable — you can always widen the net once you know what you're looking for.

6. The 3-Step Excel Setup — Do This Every Time

Every time you open a CRS export, run these three steps before you do anything else:

10. **Auto-resize columns:** Click the small triangle in the very top-left corner of the spreadsheet (this selects everything). Then hover between any two column headers until you see the double-arrow cursor, and double-click. Every column auto-fits to its content.
11. **Add filters:** Go to Data → Filter. Dropdown arrows appear on every column so you can sort and filter instantly.
12. **Freeze the top row:** Go to View → Freeze Panes → Freeze Top Row. Now when you scroll through hundreds of rows, the column headers stay visible at the top.

 **Honey Tip:** This 3-step setup takes less than 30 seconds but makes a huge difference when you're working with hundreds of rows. You will do it on every single export — it becomes automatic within a few sessions.

7. Analyzing Your Data

Once your export is set up in Excel, here is how to find your best prospects:

- **Sort by Appraised Value:** Click the dropdown arrow on the Appraised Value column and sort Largest to Smallest. Start with the high-value properties.
- **Calculate the price difference:** Right-click a column header next to Appraised Value and insert a new column. In the first data row, enter: =AL2-AB2 (substitute the correct column letters for Appraised Value and Last Sales Price in your export). Hit Enter, then copy the formula down to all rows. Label the column "Price Difference."

- **Sort by Price Difference:** Largest to smallest. Focus your outreach on the top 15–20 people with the biggest gain.
- **Scan for trusts and LLCs:** Check Owner Name 1 and Owner Name 2. Trusts, LLCs, and estates may need a different approach or can be skipped.
- **Skip negatives:** If someone's appraised value is below their last sale price, move on. There is no equity story to tell.

 **Honey Tip:** Don't know the Excel formula? Just ask. Open Copilot (Windows taskbar), ChatGPT, or Claude and type in plain English: "How do I calculate a 40% increase between two columns in Excel?" or "Show me only rows where column AL is more than \$100,000 higher than column AB." Paste the formula it gives you. No memorization required.

8. Saving Search Criteria for Reuse

Once you have built a search you like, save it so you never have to rebuild it from scratch.

13. **Click Save Search Criteria at the top of the CRS prospecting screen.**
14. **Give it a clear name that includes the example and the area,** for example: "Appreciation Wake-Up – Near Water NC" or "Out-of-State Exit – Carteret County."
15. **To prospect a neighboring area next time:** load the saved search, delete the old map shape, and draw a new polygon in the new area. All your other filters are already set.

9. AI Is Your Friend

Think of it this way: you do the first 20% (set up the search, pull the data), AI does the 60% in the middle (formulas, drafts, postcards), and you do the last 20% (review the output, make it sound like you). AI is not a shortcut — it's the middle person who never gets tired.

Task	How to Use AI
Excel formulas	Ask in plain English: "How do I show only rows where column AL is more than 40% higher than column AB?" or "How do I calculate the difference between two columns?" Copilot is built into Windows (taskbar). ChatGPT and Claude also work. Paste the formula it returns directly into your spreadsheet.
Personalized letters	Upload your CSV export and the prospecting handout PDF into the same AI session. Tell it which example you're using and which column contains the price difference. Ask it to create a personalized letter for each homeowner in the spreadsheet. It will merge the names, addresses, and numbers automatically.
Postcards	After the letters are done, say: "Now create postcards for the same people. Highlight the price difference. Keep the message short. Don't promise anything. Leave space for a QR code." Drop the AI output into Canva to add your brand colors and photo.
Strategy advice	Upload the handout and ask: "For each of these examples, should I use a postcard or a personal letter, and what is my best angle? Explain the pros and cons of each." AI will give you a recommendation for every example in the handout.

 **Honey Tip:** Always review AI output before you send anything. AI is fast but does not know your market, your clients, or your voice. The goal is to get 80% of the work done in minutes — then you spend your time on the only part no one else can do: making it sound like you.