

TOP PRODUCER COACHING & TRAINING

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Free Newsletter

Certified Professional 2009 Top Producer 8i Certified Trainer Top Producer

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TOP PRODUCER® e-mail newsletter for August 2009 from Dwight Kitchens

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During September through November we plan to offer hands-on TOP PRODUCER 8i training sessions at Florida brokerages. If you are interested in having a session held at your office, let us know soonest. Florida CEUs should be available for these courses.

I've been considering whether to replace one of our family phones with a new Smartphone. PC World recently had an article expounding upon the initial cost and plans available for multiple models. If you have been considering a similar upgrade, you might want to check out this [Smartphone cost of ownership chart](#).

During July, we were forced to cancel a number of scheduled training sessions. Generally, TOP PRODUCER Systems, Inc. sends out advertising notices approximately thirty days and again at approximately seven days prior to the session. Unfortunately, when offered in hotels, we normally must make a hold/cancel decision fourteen days prior to the class start date. Sessions in Grand Rapids, MI; Lisle, IL; Maple Grove, MN; and Des Moines, IA were all cancelled due to no expressed student interest after the first two weeks (even with a \$20 discount offer). If you want to attend a session, I encourage you to respond to the first advertisement. To help TOP PRODUCER 8i users, I'll often offer classes where I either break even or don't lose a significant amount. But, if you desire to attend training at a particular location, please register as soon as you make your decision. The longer you wait, the more likely that the class may be cancelled.

During August, we'll be offering training in the Southern U.S. If you are in either Alabama,

Florida, Georgia, Kentucky, or Tennessee (or want to travel there), this is another opportunity to get hands-on training this year. Once we're back in Florida, we don't anticipate departing Florida for another training tour until sometime next Spring.

Dwight

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www.DwightKitchens.com for the latest details.

Please forward a copy of this newsletter to friends using TOP PRODUCER 8i.

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1. TOP PRODUCER 8i Action / Listing / Closing Plans

Action Plans permit you to automate the execution of your actions. Plans schedule the delivery of letters, e-mails, envelopes, labels, and postcards. In addition, they can remind your of To-Do's and Calls which should be accomplished. Generally, as a plan runs, it schedules the execution of the tasks within Activities Summary screen on the appropriate start date.

A boon to agents is to schedule plan e-mails for AUTOMATIC DELIVERY. When this is written into the plan, the e-mail is sent by the TOP PRODUCER 8i e-mail server on the day specified within the plan, without further action on your part. Therefore, the more items scheduled within your plan for automatic delivery by e-mail, the fewer items showing up in the Activities Summary on a particular day.

2. TOP PRODUCER 8i Customer Web Pages

When working with either Listings or Closings, creating a Customer Web Page for your client is an easy way to deliver updates to your clients. Of course, should your client not be computer literate, you may need

to stick with a printed copy of a client's Service Report. But, since the Customer Web Page is so much easier for you to deliver, I encourage you to seriously consider this option for all new clients.

When creating either your Listing or Closing, the screen contains an icon for managing your Customer Web Page. If you have not previously setup your Customer Web Page specifics, a button is provided for this purpose. After setup, you will see a URL which will take your clients to a log on screen for their Customer Web Page. In my case, the URL is (<http://Ssamples1.topproducerpages.com>). This URL is constant for all your clients.

Personally, I recommend that you put this URL behind a button on your personal web-site. By clicking the button, the hidden URL (otherwise known as a hyperlink) will take your client to their log on screen.

When Manage Customer Web Page is clicked, your next screen also permits you to create a Username and Password for your client. The program will create a Username consisting of the first three letters of both the firstname and lastname of your client. Generally, I recommend that you use the whole name of your client as a username, replacing the six character generated Username. This is easier for the client to remember when they go to log on. The program also generates one of five passwords. For consistency, I recommend that you enter your own name, without spaces, as the Password. Since you are attempting to brand your name in the client's mind, consistency of using your name enhances your image.

3. TOP PRODUCER 8i Cascading Plans

Assuming that you create a Customer Web Page for each Listing/Closing, it is important that you don't inform you client of their personal Customer Web Page prior to your completion of initial tasks. It is embarrassing if they enter the Customer Web Page and nothing appears. The perfect solution to this is to use Cascading Events within your Listing and Closing plans. This sequences events so that certain events are predicated upon the completion of an earlier event. If the earlier event is not marked done, the next event will not be shown for action.

An example would be reflected in the following listing plan tasks:

<input type="checkbox"/>	Create IVR script and add 800-number to signs and marketing	To-do	2 days After listing da
<input type="checkbox"/>	send client web page e-mail	To-do	1 days After 'Stage hi buyers' is completed

Above, the IVR script is one of many intial tasks. More specifically, it is planned to be

accomplished as one of many tasks, on the second day of the listing. But, the task of notifying the client that you have made them a Customer Web Page is dependent upon the completion of your staging the home. ONLY AFTER you have marked the "Stage home to showcase features and attract buyers" as completed will the task "send client web page e-mail" be reflected in both the Activities Summary task list and the Listing / Activities / Incomplete task list. Therefore, since it does not show until a preceding activity is completed, it insures that you have progress to report when the client first opens their personal Customer Web Page.

Note that the above is made up of two To-Do's. Possibly it would have been more efficient if the dependent task had been changed from a To-Do to an E-mail. The activity could have been setup as the automatic delivery of an e-mail message using merge codes for the client's Username: first name and last name without spaces, and the Password: "yourname". In this case, once the "Stage Home..." task was marked done, the e-mail would have been automatically delivered without further action on your part. Once again, as you design your plans, consider ways to automate standard tasks.

4. TOP PRODUCER 8i maintenance changes (part 2)

Hopefully, you have worked on familiarizing yourself with changes mentioned last month. We'll now discuss some of the other changes which might be of interest.

The Leads screen now provides as Associates tab, as found within the Contact Record. Makes it easier to manually enter data with both primary and secondary points-of-contact prior to converting to a Contact Record.

Again, like Contact Records, you now have a Mass Mark Done option for Lead Activities.

A new Marketing option offers a "Perform Mail Out" selection to run a wizard.

You may now create letters and e-mails from scratch, no longer first needing to copy one of the previously written templates.

If you are familiar with the process of Listing/Closing/Transferring properties, a new Transfer Property option has been added. You may now "Transfer closing as primary and keep a record of the sold property".

The Closing Summary screen now recognizes that you may be dealing with both a Seller and a Buyer. Therefore, it now includes both Buyer and Seller columns.

Check these out and we'll discuss more changes next month.

TOP PRODUCER 8i has added significant maintenance changes during the May release. Check them out for yourself.

5. Two Useful Contact Types

I recommend that you add a Contact Type to each client's record with your preference for message delivery, i.e., if they have both a street address and an e-mail address, I would prefer to send a less expensive e-mail rather than a more expensive letter (in most cases). Therefore, I'll add a Contact Type of DELIVER BY E-MAIL to their contact record. Alternatively, if they either do not have e-mail, or prefer letters, I would enter a Contact Type of DELIVER BY LETTER. Now, whenever I send a message to a group of clients, I perform two advanced searches, each including the group to whom the message should be delivered as well as the DELIVER BY qualifier. In this fashion, those who request letters are mailed copies, which those who may receive e-mails receive an electronic copy.

Unfortunately, you may also have some clients for whom only FAXes or telephone calls will do. Therefore, add two more Contact Types, DELIVER BY FAX, and DELIVER BY PHONE. Hopefully, you will have few of these clients.

6. Community-School Reports vs. Market Snapshot

Recently, while teaching, we made a comparison between the Community & School report generated from within TOP PRODUCER 8i and the Market Snapshot service provided under a monthly subscription. It quickly became apparent that while the Community & School report permits you to compare two zip coded areas, it takes a lot of energy to generate for a specific client. You are required to choose the range from the zip coded area (1, 2, 5 miles) in which to search, and you need to consciously select the three schools you desire to display. It's quickly published to the web, so that you may deliver it through a hyperlink within a client directed e-mail.

In contrast, the Market Snapshot may be initiated by a potential client, scheduled for a frequency they desire, and unsubscribed when desired. You get the lead, yet Market Snapshot consistently delivers information about the local market and the community with not additional effort on your part. If you were to use the Community & School report for 50 leads arriving in TOP PRODUCER 8i this month, you would spend a great deal of time setting up each report and e-mailing the hyperlink. With Market Snapshot, they self subscribe (although you could do this for them as well), they quickly get the report, and you have a lead for follow-up. With no limit on the number of clients who are on the Market Snapshot service, you could have everyone in your database receiving updates with no recurring actions on your part. For my money, at \$79 per month, Market Snapshot is 'worth it's weight in gold'.

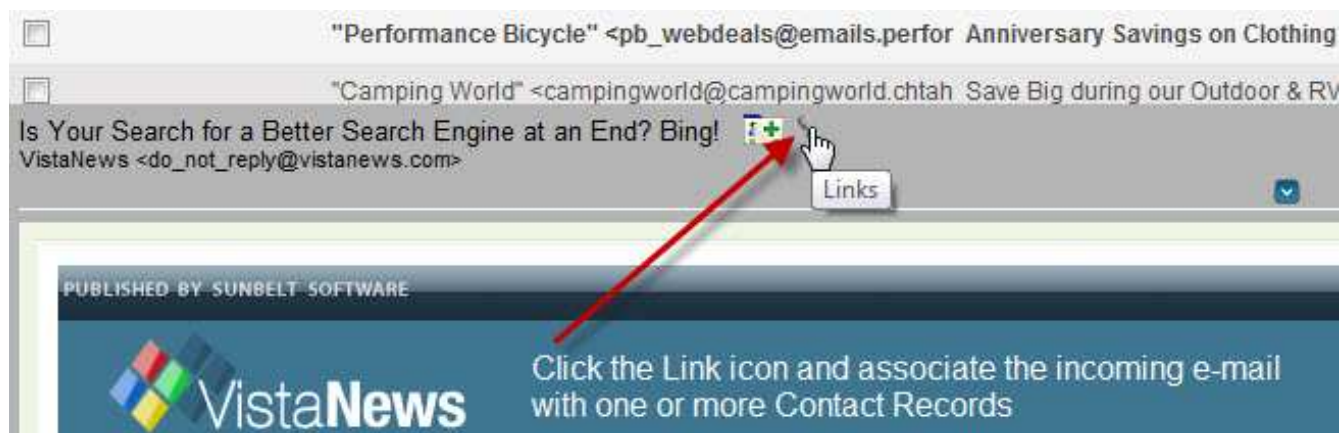
7. Storing External Documents within TOP PRODUCER 8i

During a June class in Edgewater, MD , I misspoke on one significant point. I was asked about storing documents within TOP PRODUCER 8i. I stated that it could not be done. I was incorrect and want to set the record straight.

If an incoming document has an attachment, when it is linked with the contact record, the

attachment is also linked. Therefore, if you desire to save copies of contracts, diagrams, letters, etc. with your contact records, you merely need to put them in an e-mail as an attachment, and send them to your own e-mail address. I suggest that as you title your e-mail, please put "with attachment" at the end of the title. This will help you later as you attempt to see which e-mails contain attachments within your Contact Record's Activities - Complete section.

Once the e-mail arrives within your system, link it to one or more Contact Records, such as your own and that of the Seller, Buyer, Loan Officer, Lawyer, etc.



Then, click the Add Link menu shown below:



Here you perform a search to find the Contact Records to which you desire to link. Check off the appropriate Contact Records and when you click Link to Contacts, the links will be established.

But, it is not intuitively obvious where that document is stored. If you merely go to a Contact Record's Activities Tab, and select Complete, you see all the incoming e-mails associated with that Contact Record. Should you merely click the Letter Icon (View Email Message), you will see the e-mail, but not the attachment.

Dwight Kitchens (Contact) - Windows Internet Explorer

https://www.topproducer8i.com/2250020101/Contacts/ViewEditContact.aspx?contact_id=0201f09e-c6ec-4f57-8cfb-16472029002e

Google Search Bookmarks Check AutoFill

Registration Center Customize Links Get More Add-ons Suggested Sites

Compose Mass Email Dwight Kitchens (Cont... View Queensboro Order YouTube TOP PRODUCE... Quick Search

Welcome, Dwight Kitchens FULL SCREEN DOWNLOADS

Contacts Home Calendar Contacts Listings Marketing Email Financial Mobility

Home > Contacts > Contacts Summary > View Contact

Dwight Kitchens

My Info

Next Call Next Appointment

410 Travelers Drive
 (Mobile City, NY) 11969
 Primary

Assigned to: Not assigned
 Created: 2009-02-01 09:50AM
 Last Updated: 2009-06-01 02:01PM by Dwight Kitchens

Plans: TP 8i Group and individual class followup

Email dskitchens@topproducer8i.com
 My List's E-mail: mylist@topproducer8i.com

Deliver My Lead for Training

Lead info Contact Details Properties Associates Activities **Lists/Inqs/Closings** Photos Notes

	DESCRIPTION	DATE	TIME	TYPE	PLAN
	8i Quick Start Procedure Guide	2009-06-03		Email	* TP 8i Group and
	Thanks for Permitting me to work with you	2009-06-02		Email	* TP 8i Group and
	Buyer Inquiry - Thank You	2009-06-01		Email	** Initial Class R
	Buyer - Course Outline	2009-06-01		Email	** Initial Class R
	Text Messaging	2009-06-01		Email	** Initial Class R
	Additional Software Programs	2009-06-01		Email	** Initial Class R
	Fw: Top Producer 8i - Hands-on Training	2009-06-01	9:32am	Received Email	
	Top Producer Customer Feedback Survey	2009-06-01	2:13pm	Received Email	
	MLS to board	2009-01-13		To-Do	* my Listings seen

Add Activity Mass Open Selected Action Plans

1. Select the e mail you desire to open.
 2. Click the corresponding envelope icon to open and see your e-mail.

Alternatively, when you click the title of the e-mail, it opens a different window.

<input type="checkbox"/>	Additional Software Programs	2009-06-01		Email
<input type="checkbox"/>	Fw: Top Producer 8i - Hands-on Training	2009-06-01	9:32am	Recei
<input type="checkbox"/>	Top Producer Customer Feed	Fw: Top Producer 8i - Hands-on Training	2:13pm	Recei
<input type="checkbox"/>	MLS to board	2009-01-13		To-do

Alternatively, when you click on the title of the e-mail, another windows opens, which contains your e-n attachment(s).

Home > Calendar > Activities Summary > View Activity

ACTIVITY

ACTIVITY TYPE
Received Email

ACTIVITY DETAILS

Description: Fw: Top Producer 8i - Hands-on Training
Assigned to: Dwight Kitchens
Date: 2009-06-01
Drop from Activities: 0 after activity date
Priority: High

CONTACTS

Contacts: [Kitchens Dwight, Phyllis](#)

TEMPLATE

Template


Email Attachments: [Holiday Inn Proposal-Fact Sheet.doc](#) 618496


NOTES

1. Click the Email Attachment to see the document.
2. Click Open to download and open the document.

File Download

Do you want to open or save this file?

 Name: Holiday Inn Proposal-Fact Sheet.doc
Type: Microsoft Word Document
From: www.topproducer8i.com

 While files from the Internet can be useful, some files can harm your computer. If you do not trust the source, do not save this file. [What's the risk?](#)

Now that you have the document in question open, you may read, print, etc. Should your document be in its' native format, you should be able to modify it at this time. Alternatively, if you converted it to a .pdf document prior to attaching it to your message, it is stored in a smaller format but is no longer editable without document conversion software. Therefore, a word processing document without signatures would be a good candidate to keep in its' native format. You can then open it later and make changes. Alternatively, a word processing document with signatures needs to be scanned and saved in an uneditable document. It would likely be stored either as multiple pictures (.jpg format) or continuous scrollable pages (.pdf

format).

In any case, documents may be stored with the Contact Record, but viewing the document is a separate step from viewing the e-mail to which it was attached.

I hope that this helps if you are interested in storing digital copies of all your processing documents within TOP PRODUCER 8i. Should you have questions, give me a call.

8. Smart Defrag by IObit (free)

Last month I mentioned [Advanced System Care](#) (free), a good program to maintain your computer's internal operations. This month, I suggest that you download the free [Smart Defrag](#) (also by IObit). While primarily a defragmentation program, it permits three levels, a 'defrag only', a 'fast optimize', and a 'deep optimize' option. The latter, 'deep optimize' moves the most often used programs to the front of your hard disk drive, permitting them to run more quickly.

Between Smart Defrag and Advanced System Care, a number of my computers appear to both start more quickly and load programs more quickly. REALTORS often complain that over time their computers have slowed down. As more programs are added, this is a common occurrence. But, these two programs appear to help overcome the accumulation of 'trash' which clutters our computers. They will help improve your computer's performance. Unfortunately, they don't automatically release memory by turning off the execution of unnecessary programs (something you fix by judicious use and configuration of msconfig.exe). And the more memory you can give to a program, generally, the faster it will run.

9. Using a Virtual Assistant to setup your practice

For many agents, converting to a more automated practice is difficult. Everything has been previously run outside of TOP PRODUCER 8i. Getting organized may be a challenge for some REALTORS. I suggest that if you desire to become more organized, but don't want to do the work yourself, hiring a Virtual Assistant (VA) specifically for setting up the system is often valuable. Of course, it helps if you know what you want to accomplish, as you need to provide some direction. A Virtual Assistant can certainly build Marketing Library categories, load your paper/electronic documents (letters, e-mails) into your libraries, build plans which use your Marketing Library materials, set up auto-apply plan rules, design flyers, and perform other critical tasks to get you up and operating. For those REALTORS who lack typing skills, a Virtual Assistant is invaluable to get your system up and running quickly. You may be able to handle the daily work, but setting up a system may be more than you are personally willing to do.

Prior to an initial discussion with a Virtual Assistant, I suggest that you start collecting the documents needed once a VA is employed. If you save documents and document templates on your computer, determine which would fit in a new system. If you merely have printed copies of old letters/e-mails, you might consider providing these copies to your newly hired VA. Find

any scripts you use. Find checklists you use for Listing and Closing transactions. How might they fit into your automated system? Think about what type of flyers you want to advertise you Just Listed properties. The more you think about what you want done, the more definition you can provide to the work to be performed by your new VA.

You might not have the time to send all your documents to your VA. In this case, giving the VA remote access to your computer may make sense. There are a number of programs which permit your VA to access your computer from their location. This would permit the VA to use files currently stored on your computer in building your TOP PRODUCER 8i system. Programs such as [Ultra VNC Remote Support](#) (free), [LogMeIn](#), [Radmin 3](#), and [RealVNC](#) would all work. If you choose this option, which I encourage, please insure that personal files, to include financial records, are not on the computer to which you give access. Better safe than sorry.

10. Training Schedule

3-4 August 2009 Northern Kentucky Association of REALTORS, Florence, KY (7660 Turfway Rd. Florence, KY 41042) 12 CEUs included

6-7 August 2009 Louisville, KY (Holiday Inn Lakeview-Louisville North, 505 Marriott Drive, Clarksville, IN 47129)

10-11 August 2009 Nashville, TN (Open to all REALTORS, RE/MAX Elite, 109 Westpark Drive, Brentwood, TN 37027)

13-14 August 2009 Birmingham, AL (Hampton Inn & Suites, 4520 Galleria Blvd., Hoover, AL 35244)

17-18 August 2009 Georgia Institute of Real Estate, Atlanta, GA (5784 Lake Forrest Drive NW, Atlanta, GA 30328) 14 CEUs, lunches included

24-25 August 2009 Tallahassee, FL

27-28 August 2009 Gainesville, FL (Comfort Inns & Suites, 3440 SW 40th Blvd, Gainesville, FL 32608)

Agent.signature

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Should you need Virtual Assistant services, consider either [Team DoubleClick](#), a TOP PRODUCER Systems, Inc. Preferred Service provider, or [BestAgentBusiness.com](#).

