

**TOP PRODUCER COACHING & TRAINING**

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

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Recipient.company

Recipient.letter\_salutation

Possibly you've already noticed it, but Live Post has now been included with each and every TOP PRODUCER 8i subscription. This permits you to send commands to PostNexus where they print your selected LivePost postcards. They can also print and mail your letters and envelopes. All that this requires is a PostNexus print driver, and an account with PostNexus. They print your materials and mail them out, the deduct the cost of the mailing from your account. If you've ever attempted to print two-sided postcards, this is a welcome alternative. Go to [www.TopProducerCampus.com](http://www.TopProducerCampus.com) and search on LivePost for both setup instructions and Adobe print settings.

We've returned to Florida after four and one half months of traveling. If you are interested in personalized training, this is the time to ask. Through Citrix's "Go To Meeting" software, we can train remotely on any TOP PRODUCER subject of interest. This works for both individuals and small teams. Give me a call to schedule a session.

Dwight

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Check [www.DwightKitchens.com](http://www.DwightKitchens.com) for the latest details.

Please forward a copy of this newsletter to friends using TOP PRODUCER8i.

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## 1. TOP PRODUCER 8i Management Statistics

How many potential clients' contact records are within your database? I'm assuming that your contact records have contact types assigned. Since you are unlikely to sell homes directly to other realtors (both local and out-of-town), and out-of-town vendors, you can probably discount their contact records. Performing a search on these contact types, you can get a count of people unlikely to do business with you. Comparing this number with the total number of contact records within your database will give you more useful information.

In my case, the

Home > Contacts

**Double click to open**

KEY STATS		TOP CONTACT TYPES	
Total Contacts	11441	1. Unknown Street Address	6919
New This Month	20	2. Eastern States	5942
New Last Month	16	3. Real Estate Office	4919
New Last 3 Months	102	4. Delivery by e-mail	2987
		5. E-Mail Newsletter excluding AOL-MSN-YAHOO	2765

LAST VIEWED		
Palmer, Stephanie	MS	769-798-6000(H)
Rome, Sharon	605 Bramblewood Dr., Hattiesburg, MS	601-818-1129(H)
Key, Melissa	MS	601-596-5400(H)

statistics reflected to the left show that I have 11,441 contact records. Assuming that I have 10,000 REALTORS and Vendors within my system, I only have 1,441 potential clients. Assuming no duplicates, which would further lower the number of potential clients, is this sufficient to make a good living as a REALTOR?

Consider NAR's earlier statistics that most owners hold their home for ten years. If so, I could expect approximately 140 of the potential clients to move in any one year. Since this is not a

perfect world, I guess that I would continue to compete with other REALTORS. Therefore, of these potential clients, my market penetration would help determine how many transactions I would receive from this number. Assuming that in my farm areas, I generally receive 20% of the listings, I could anticipate approximately 28 transactions during the year.

If when using your own Total Contacts numbers from the management statistics screen, after subtracting other REALTORS and out-of-area Vendors, you don't see the number of potential transactions you want, there are two remedies. One is to increase your market penetration. This is done by building a better relationship with your potential client base. Using TOP PRODUCER 8i Action Plans (marketing plans) to have more contact with your potential client base helps to increase your market penetration. Another is to increase the number of potential client contact records you maintain within your database.

When you are harried and question whether you have time to enter contact information within your database, consider that having that information now leads to transactions later. You can't merely rely upon people showing up at your door asking to either list or purchase properties. You need to be proactive and build lifelong relationships with your client base.

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

The TOP PRODUCER text editor has been improved. Over the past few months, I've sometimes found that when saving this newsletter, the desired colors and fonts were not properly reflected in the save. This has been fixed in the maintenance release, in addition to minor cosmetic enhancements.

The TOP PRODUCER 8i e-mail manager's Inbox now permits a "Select All" feature. This means that you can now select everything and then do something foolish, such as performing a Mass Delete. The capability is nice, but please be careful!

A new "Link to Contacts" will permit you to either link one or more (multiple) e-mails to one or more contacts. Great when you have been having an online exchange of messages and want to store them within the Completed Activities tab of multiple Contact Records.

Clients generally have more than one e-mail address. While I don't recommend mailing to a person's multiple personal e-mail addresses, there are certainly times when I want to e-mail a message to multiple e-mail address within the Contact Record. These multiple addresses generally consist of husband and wife addresses, or possibly Associate's addresses. Compose Mass E-mail now provides an option to "Include Primary Contacts' Other E-mails", which by default, is set to "NO". Setting it to "YES" shows you the alternate addresses in addition to the primary address.

While I personally use TOP PRODUCER 8i's E-Mail Manager exclusively, some REALTORS prefer to continue with Microsoft's Outlook. If you remain with Microsoft's Outlook, version 2

Contacts" permits you to link to more than one contact in your TOP PRODUCER 8i database. Additionally, should the e-mail address not be in your e-mail manager, you may now add it 'on the fly'. Optionally, if the contact record is present, but Outlook is not displaying a recognized e-mail address, you may now add this e-mail address to the Contact Record 'on the fly' as well.

We've now discussed most of the changes from this last maintenance release. Hopefully, these descriptions have helped you to better understand how to make use of these enhancements.

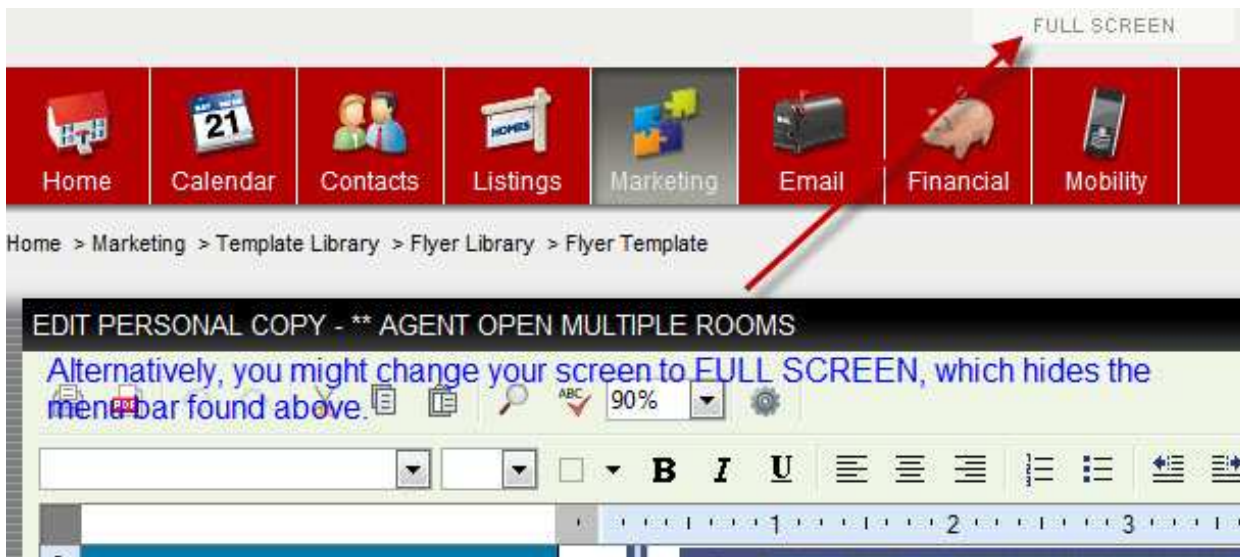
### 3. Screen size and orientation

During a May training session in Cincinnati, while working on developing flyers, an assistant asked why TOP PRODUCER 8i could not display an entire flyer for editing on the screen. While it is possible to reduce the size of the flyer in percentages, with smaller font text, the more of the flyer you see on the screen.



Note that you may lower the percentage from full size (100%) to see more of the flyer on your screen space.

Additionally, you might go to FULL SCREEN mode, which hides the standard TOP PRODUCER 8i menus, giving more screen real estate.



Alternatively, if your monitor swivels from landscape to portrait mode, working with flyers is a perfect application portrait mode. HP makes a number of large monitors (the 22" HPw2207 and 24" HPw2407 units are examples) which swivel.

Similar comments were voiced about being unable to read an entire e-mail in the e-mail manager. Again, changing the orientation of your monitor from landscape to portrait might eliminate much of this concern.

### 4. Auto Apply Lead Plans

Most REALTORS have lead forms on their web-sites. This permits potential clients to provide basic information which is delivered either by e-mail, or directly into TOP PRODUCER 8i. Of course, I recommend the automated delivery of the information as NEW LEADS within TOP PRODUCER 8i. But, once the information arrives within the Lead Manager, what does the REALTOR do with it?

I suggest that every REALTOR write rules which define which plans will be applied to an incoming lead. Once TOP PRODUCER 8i determines where the lead originated, which page it came from, and whether the potential client is either a buyer or a seller, it can automatically apply a follow-up plan responding to the inquiry. An example of the rule screen is shown here.

NAME	SOURCE	SUB SOURCE
Generic Buyers	Agent personal web page	Generic Client
Generic Sellers	Agent personal web page	Generic Client
Keller Williams Buyer Rule	Agent personal web page	Keller Williams
Keller Williams Seller Rule	Agent personal web page	Keller Williams

Above, the rule specifies source, sub-source, and client type. Once the lead arrives, your computer matches the criteria with the lead, then initiates an Action Plan in response. This is a great way to make an initial response.

## 5. CMA Property Adjustments

TOP PRODUCER 8i permits you to make property adjustments on recently sold properties to come up with an appropriate price recommendation. But, the steps required may not seem logical, but they certainly work. Generally, we'll choose one of our own preconfigured CMA templates, pull comparables in from our MLS, and save the results. Then, we'll open the results by clicking the Marketing / Presentations menu selections, opening the most recently generated presentation. Now, within the open presentation, you will be able to edit the recently sold properties.

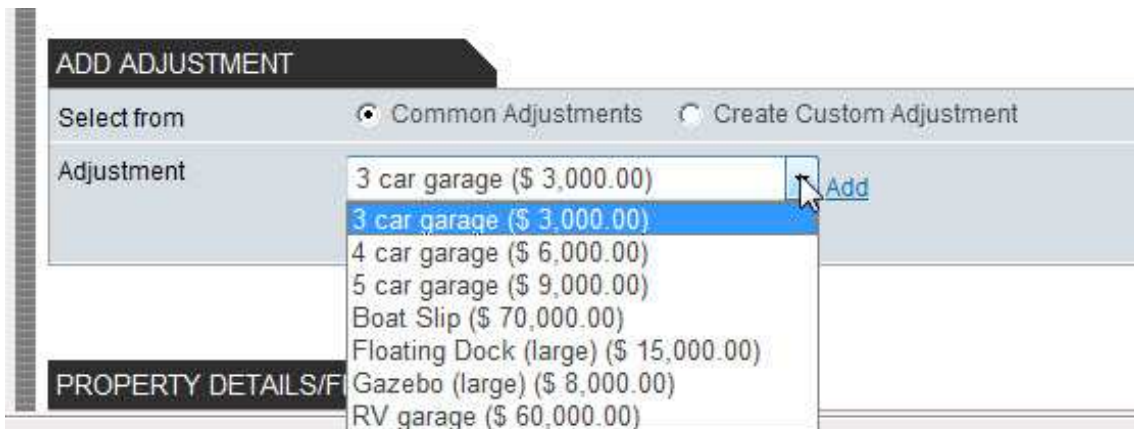
Click on the property address of one you desire to adjust, and you will get an editable page.

As you start to  
make your edits,

you will notice that there are no currently listed adjustments within the CMA. As you look at the Adjustment tab, you will see an Add Adjustment option underneath

(bottom of screen). Click that. After clicking, you may choose from a list of common adjustments (ones you have previously created) or create your own custom adjustment. Either may be added or subtracted from your recently sold property.

Select the desired adjustment from the drop-down list, select either the Add or Deduct radio button, and then click Add Adjustment. This will enter the adjustment under the Adjustment tab of the comparable.



You may store a drop-down library of frequently used adjustments. These are added to the list by using the Add option to the right of the

drop-down selection.

Here, you see the results of multiple adjustments. The original list price of \$825,000 has been adjusted based on your comparable having a three car garage, a boat slip, and a gazebo. The total adjustments were \$81,000, resulting an adjusted sales price of \$744,000.

## LISTING/CLOSING INFORMATION

Status *	Recent Sale
MLS Number	06181978
List Price	\$ 847900
List Price/Sq. Ft.	\$ 142.74
Listing Date	2009-03-03 YYYY-MM-DD
Sale Price	\$ 825000
Sale Price/Sq. Ft.	\$ 138.89
Sale Date	2009-03-25 YYYY-MM-DD
Days on Market	263 <a href="#">Reset DOM</a>
Adjusted Sale Price	\$ 744000.00
Adj. Price/Sq. Ft.	\$ 125.25

## ADJUSTMENTS

ADJUSTED FEATURE	DESCRIPTION
3 car garage	
Boat Slip	
Gazebo (large)	

[Add Adjustment](#)

## 6. ClipX

From time to time, you might want to be able to recall a list of paragraphs which you can 'paste' into some portion of TOP PRODUCER 8i. One easy to use TOP PRODUCER 8i enhancement program is an expanded Windows clipboard. You may find the free ClipX clipboard extender at <http://clipx.org/>. I encourage you to give it a try. You may build libraries of comments and save them for reloading at the appropriate time. The program sits in your system tray ready for use.

An example might be if I wanted to use the following comment within a Client Service Report / Customer Web-site.

"The Centralized Showing System will record feedback provided by a REALTOR's client after seeing your home. Please go to [www.showings.com](http://www.showings.com) to see feedback on your address."

Rather than typing it each time, the first time I go to complete an activity, I could right-click the ClipX system tray icon, choose Clipboard History, and then choose Load History, choose my "Listing Comments" text file to reload previously stored comments applicable specifically to my Listing / Closing activities. My library might consist of comments similar to the following:

A flyer has been made showing your property. This flyer has been placed in the signbox on your property, has been sent to the top XXX REALTORS in XXXXX county, and has been sent to my XXX buyer prospects.

Your home was shown to other REALTORS thru an MLS tour of your property. They are now in a position to better advertise your listing to their select buyer list.

Your home information has been entered into the local Multiple List System. This information may be seen by prospective purchasers as they browse web-sites such as [www.REALTOR.com](http://www.REALTOR.com), << [www.XXXX.com](http://www.XXXX.com), [www.XXXX.com](http://www.XXXX.com) >>.

A new flyer has been made showing your property. Copies will be provided to you for use at your home, Additional copies have been sent to all of my prospective buyers and to the top 100 REALTORS in << XXXX >> County.

Ad was placed in << XXXX (name of newspaper)>> for OPEN HOUSE on << XX/XX

A sign has been ordered for your property. Signs have been shown to draw interest from potential clients in approximately XXX % of all cases.

A SUPRA lockbox has been placed on your property to enable other REALTORS to show your property in your absence. For enhanced security, it also permits us to track which REALTORS entered your residence.

## **7. Register clients for Market Snapshot from either the Blackberry or iPhone**

TOP PRODUCER Systems, Inc. has recently written a set of instructions on how to setup and send a Market Snapshot directly from either your Blackberry or iPhone. The same may also work from the new Palm Pre. In either case, the instructions are simple and appear to work well. If you have either of these three smartphones, I encourage you to give it a try. [Download here.](#)

## **8. OCR, PDF, and JPG - what you need to know**

Last month I mentioned that yes, you can store documents within TOP PRODUCER 8i. You merely need to have them attached to e-mails so that they are linked to Contact Records.

OCR, or "optical character recognition", is a process by which we convert documents into an editable format with software. This generally involves either scanning or opening a document in its' original format, and converting it into editable text and associated graphics.

Portable Document Format (PDF) is a file format created by Adobe Systems in 1993 for document exchange. PDF is used for representing two-dimensional documents in a manner

independent of the application software, hardware, and operating system. This makes it easy to exchange documents between Windows, MAC, Sun, and other operating systems. REALTORS often make .pdf documents by printing to a 'PDF print driver' on their computer. They may then send the .pdf document to others as an attachment.

JPG is the file extension, but it is properly referred to as JPEG, short for "Joint Photographics Experts Group". The JPEG committee created the JPEG standard. JPG graphics may be stored in varying sizes. Quality degrades as the size decreases. The JPG standard is primarily used for cameras in the taking of photographs.

If you took a picture of this page with your camera, you would likely have a JPG photograph. If you wanted to edit the text, you could download the photograph to your computer, then use OCR software to convert it back to text. If you wanted to send the text to someone in an uneditable format, you might convert the OCR'd document to .PDF by printing it through a 'PDF Print Driver' which would save the file in .PDF format on your computer. From here it could be attached to an e-mail and sent elsewhere as an uneditable file.

TOP PRODUCER 8i can store each of these type documents (text, .PDF, and .JPG) as attachments. Just remember that storing them is easy, finding them is more difficult. Make sure you plan how you will title your e-mails with attachments. I recommend that you follow the title with the words "with attachment".

OCR software is available commercially but can be found for free. A free OCR program is SimpleOCR. SimpleOCR can be downloaded at <http://www.simpleocr.com/Download.asp>. Commercial programs are available from [ABBYY FineReader 9 Professional](#) , [IRIS ReadIRIS Pro 12](#) , and [Nuance OmniPage Pro 17](#) .

## **9. Change your Account Photo in MS Vista**

**If you created a user account for Microsoft's Vista operating system, you were offered an opportunity to choose from a selection of stock photos. If you don't like those options, why not substitute one of your own photographs?**

**To change your user account picture:**

- 1. Click the Start menu.**
- 2. Click the current [picture icon](#) . The User Accounts window will open.**
- 3. Click the Change your picture option.**
- 4. To use one of your own pictures, click Browse for more pictures.**
- 5. Locate and select the picture you want to use and click Open**

**Agent.signature**

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