

**TOP PRODUCER COACHING & TRAINING**

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## TOP PRODUCER® e-mail newsletter for February 2010 from Dwight Kitchens

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Hopefully, while the Winter weather may be impacting your getting 'out and about', it should not have impacted your marketing. With the new capability to copy previous plans, with copies of all their associated letters/e-mails/postcards being simultaneously made, you have an impressive tool. Have you looked through your database to see who is not currently on a follow-up plan? You should do so immediately. Then, when you identify these contact type groups, develop appropriate plans for each of them. Then, use the Mass Update option to assign the appropriate plan. Keep your name in front of your possible/current/former clients so that as the Winter passes, they will think favorably of you when Spring turns the corner.

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. Enabling the Contact Status Feature

Thanks to TOP PRODUCER, you now have the capability of having a status assigned to your contacts. This helps in determining what should be done next to maintain contact. If you have not enabled this feature yet, I encourage you to do so immediately.



[Watch The Video](#)

To enable the Contact Status feature click on **Preferences** at the top right of any Top Producer 8i screen, then clicking the **Contacts** sub-tab, and then click on the **Contact Status Setting** tab.

The Contact Status Setting tab contains only one option: to Enable or Disable the **Contact Status** portlet that appears on the **Dashboard**. The Contact Status portlet displays a pie-chart of the status of all contacts in your database, based upon multiple criteria including how many activities have been completed for that contact and information in their record. This helps give you an indication of your overall activity and might help identify areas in which to improve your follow-up. This feature is disabled by default.

## 2. On Demand Property Information

I've been impressed with the Market Snapshot feature of TOP PRODUCER ever since it was implemented. It is a wonderful means by which you can keep your clients abreast of what is happening in their neighborhood. Now, TOP PRODUCER 8i has included On Demand Property Information which is available each time to talk with your client from their Contact Record. You become the expert about everything which is happening within their neighborhood. I encourage you to immediately start working with this feature. You will be surprised at the amount of information it contains and how it helps you 'break the ice' with your current and former clients.

Click on "Things to talk about" within your Contact Record to see information for your current clients. Of course, TOP PRODUCER is using your data, so if your data is inaccurate, you will see inaccurate results. An example is reflected below:

Here, my Contact Record reflects my former address twice as a current investment property (123 Goucher Way). Therefore, you will see that address twice in the On Demand Property Information option. I do recommend that you properly transfer properties upon the conclusion of sales, and that any duplicate entry errors be removed. When such errors are not corrected, they result in On Demand Property Information which is slightly 'off base'.

Dwight Kitchens



Phyllis

Next Call: [2009-06-26 Call](tel:2009-06-26) Next Appointment:

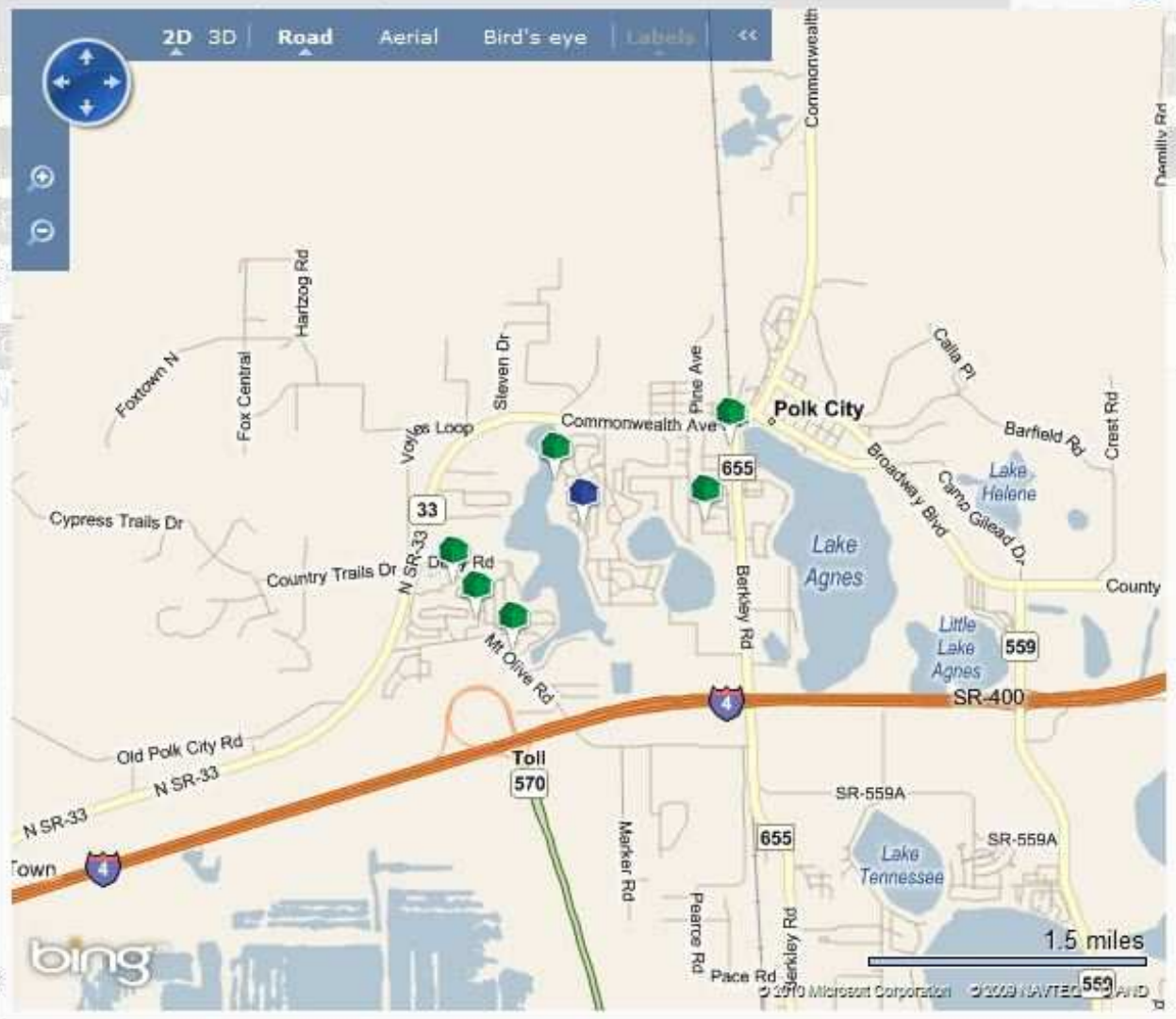
Lead Info Contact Details Properties Associates Activities Listings/Closings Photos Notes

<input type="checkbox"/>	ADDRESS	TYPE
<input type="checkbox"/>	<a href="#">26530 Apple Tree Lane, BARRINGTON, IL</a>	Pre-owned
<input type="checkbox"/>	<a href="#">27 Bighorn Ct, SOUTH BARRINGTON, IL</a>	Pre-owned
<input type="checkbox"/>	<a href="#">2 Brandywine Rd, SOUTH BARRINGTON, IL</a>	Pre-owned
<input type="checkbox"/>	<a href="#">123 Goucher Way, Churchville, MD</a>	Investment
<input type="checkbox"/>	<a href="#">123 Goucher Way, Churchville, MD</a>	Investment
<input type="checkbox"/>	<a href="#">410 Travelers Drive, Polk City, FL</a>	Primary

Add Property | Mass Open

Here, if you click "View all on map" for either current listings or recently sold, you will get additional information about those properties. Place your cursor on the individual property icon within the map and you get basic information on that location. There is also a link to Realtor.com which will provide additional details.

410 TRAVELERS DRIVE, POLK CITY, FL 33868-5144



## OTHER WEBSITES

DwrightKitchens.com

[Add Another Website](#)

This service is included within your TOP PRODUCER 8i subscription at no additional cost. I encourage you to implement it immediately, in conjunction with each call within your follow-up plans.

### 3. Use Mass Update to Fix Your Plans

Applying proper plans is one of your best ways of marketing to your clients. Now that you can easily copy both the plan structure, and the individual activities, in one fell swoop, they are easier than ever to implement. Yet, most TOP PRODUCER 8i plans require that included e-mails be manually released for delivery, adding extra work either to you or your support staff. Thankfully, the new feature of performing a mass update to plan activities comes to your rescue.

**MASS UPDATE PLAN SETTINGS**

You can specify certain plan settings to be applied to the activities you have selected from your plan. Select only those items you wish to have updated. Otherwise, all other values left blank will use the system default or keep the setting you had specified before.

Assigned to: Dwight Kitchens

Drop from Activities: 7 day(s) after due date

Weekend Activities: If activity falls on a Saturday, move it to: Previous business day  
If activity falls on a Sunday, move it to: Next business day

Priority:  High  Medium  Low  Leave this setting as is

Automated Send?:  Yes  No  Leave this setting as is

Include Signature?:  Yes  No  Leave this setting as is

Update Plan Settings Cancel

In this example, assuming that I have selected each activity using an e-mail to deliver my message, I can use the Mass Update Plan Settings screen to change how my plan behaves. Here, I've assigned the task to myself (if I had an assistant, it would probably assign the activity to the assistant). I've set a drop off date (not necessary when an e-mail will be sent automatically, but useful if you had chosen to leave it as a manual released e-mail). Note that the Automated Send? is set to 'Yes'. This is what causes TOP PRODUCER 8i to release the e-mail without any extra effort on your part. And, of course, if you had not previously included a signature block within your e-mails, you can have them all update at once with the Include Signature option being set to 'Yes'. If any of the e-mails had previously been set for Automated Send or to Include (your) Signature, there would be no problems, so I don't take the time to open each e-mail to see how it is set. Generally, I want every e-mail within a plan to be treated the same way and therefore perform the Mass Update Plan Settings on all included e-mails.

While I've discussed e-mails, you could easily reassign all the letters from yourself to your new assistant. Just remember, these changes impact plans applied in the future, not to plans currently applied.

#### 4. Windows Keystroke Shortcuts

There are numerous ways of working with Windows. You may not be familiar with some of the following shortcuts. Each version of Windows (7, Vista, & XP) have keystroke shortcuts.

Windows 7:

Check <http://productivity.ben61a.com/windows/windows-7-shortcut-keys.php> for a more detailed look. Here are a number of keystroke shortcuts.

- Win+Home: Clear all but the active window
- Win+Space: All windows become transparent so you can see through to the desktop
- Win+Up arrow: Maximize the active window
- Win+Down arrow: Minimize the window/Restore the window if it's maximized
- Win+Left/Right arrows: Dock the window to each side of the monitor (If you've got dual monitors, adding Shift to the mix (e.g., Win+Shift+Right arrow) will move the window to the adjacent monitor.)
- Win+T: Focus and scroll through items on the taskbar.
- Win+P: Adjust presentation settings for your display
- Win+(+/-): Zoom in/out
- Shift+Click a taskbar item: Open a new instance of that application

### **From Desktop**

1. **Windows Key + Tab** = Aero [press Tab to cycle between Windows]
2. **Windows Key + E** = Windows Explorer is launched.
3. **Windows Key + R** = **Run** Command is launched.
4. **Windows Key + F** = Search (which is there in previous Windows versions too)
5. **Windows Key + X** = Mobility Center
6. **Windows Key + L** = Lock Computer (It is there from the earlier versions as well)
7. **Windows Key + U** = Ease of Access
8. **Windows Key + P** = Projector
9. **Windows Key + T** = Cycle Super Taskbar Items
10. **Windows Key + S** = OneNote Screen Clipping Tool [requires OneNote]
11. **Windows Key + M** = Minimize All Windows
12. **Windows Key + D** = Show/Hide Desktop
13. **Windows Key + Up** = Maximize Current Window
14. **Windows Key + Down** = Restore Down / Minimize Current Windows

15. **Windows Key + Left** = Tile Current Window to the Left

16. **Windows Key + Right** = Tile Current Windows to the Right

[Continue pressing the Left and Right keys to rotate the window as well]

17. **Windows Key + #** = Quicklaunch

18. **Windows Key + =** = Magnifier

### **From Windows Explorer**

19. **Alt + Up** = Go up one level

20. **Alt + Left/ Right** = Back/ Forward

Windows Vista:

<http://windows.microsoft.com/en-US/windows-vista/Keyboard-shortcuts>

Windows XP:

<http://support.microsoft.com/kb/301583>

## **5. Time Management**

Hopefully, you are making good use of the HOME menu option to see what you need to accomplish, and your CALENDAR menu option to track your appointments. Of course, alarms and reminder e-mails may also play a part in your practice. But, do you also have a newly generated list of WHAT YOU SHOULD NOT BE DOING? We're approximately nine percent into 2010. If you made resolutions, have you been keeping them thus far. May I suggest that you might want to prominently post a list of those items which you should not be doing during 2010. You know, we all have time wasters in our lives. If we can identify them, and be reminded of what we want to do about them, we have a better chance of succeeding.

## **6. Make Use Of web-site**

As REALTORS, your practice is of primary concern. Computers are merely a tool to help you maintain and enhance your practice. To that end, many REALTORS have questions about the use of their computing tools which go unanswered. One interesting web-site which may provide insights into your computing needs is [www.MakeUseOf.com](http://www.MakeUseOf.com) . Of particular interest may be the TOPICS and MOU GUIDES section found on the right-hand side of the page. Here, you can find useful information on particular topics, as well as indepth discussions within varying guides.

## **7. Training Plans**

We're still wintering in Florida. Plans are not yet settled as to where we will travel during the Spring-Summer of 2010. If you desire that we come to your area, let us know. Possibly we can build a group of REALTORS interested in learning how to put TOP PRODUCER 8i to better use.

Agent.signature