

## RealtorPro™ Frequently Asked Questions

1. How often are the documents published?
2. Can I email the material directly from the system?
3. When do they arrive? Are they emailed or do I get them on the web?
4. What subjects are covered?
5. To whom can these pieces be distributed?
6. Who is the author of the marketing material?
7. When is the best time to distribute these publications?
8. What if I would like to customize the publication?
9. Is the information going to be too technical for my business partners and customers to understand?
10. How do I use the Real Estate Report™ most effectively?
11. How is the weekly HTML newsletter customized?
12. What if I do not have a photo or logo?
13. Can I edit the marketing materials?
14. Can I share my subscription with other?
15. Can I send to whomever I want?
16. What is the target audience for the different marketing pieces?  
(The Real Estate Page™, Real Estate Trends™, and The Sales Update™)

### 1. How often are the documents published?

The RealtorPro™ marketing materials are published as follows:

- *Real Estate Report*™ - Personalized weekly HTML email for your general database mailings. *The Real Estate Report*™ has two formats: the “short” version does not contain the market report or chart of indices.
- *Real Estate Update*™ - Four page monthly print newsletter that you can mail monthly or quarterly.
- *Real Estate Trends*™ - This one page document is posted monthly and is available as a PDF and as a Microsoft Publisher document.
- *The Sales Update*™, and *Real Estate Page*™ - There is a library of these sales articles on the site as HTML's. You can view the library, select the issue that you would like and email it to yourself. These documents can also be converted to PDFs and printed.

[Back to Top](#)

### 2. Can I email the material directly from the system?

Yes, you can email any of the material in the “online” section of the dashboard (as opposed to print materials). On the left hand side of the Dashboard Page, you will see

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Email Lists. This will take you to the section of the system that will allow you to add email lists to the system.

The lists must be imported as CSV files. Directions are available to help you convert an Excel file to a CSV file. Once your file has been converted to a CSV file, name the list under Add a New List and upload. You can add individual addresses to uploaded lists as well. You can also change the name of a list that has already been created.

To email a document using the system, go into a library and locate the document. Click on “Email This Document to My Email Lists.” A pop up will appear asking you which list you would like to send to. Click on one or more and then click Send Your Email.

*Note that spamming is not allowed. You may purchase lists and load them into the system.*

[Back to Top](#)

### **3. When do they arrive? Are they emailed or do I get them on the web?**

The weekly HTML email, *The Real Estate Report*<sup>TM</sup>, will arrive in your email either Sunday or Monday. You can also view and email it to yourself by logging in to your account.

The *Real Estate Update*<sup>TM</sup> and *Real Estate Trends*<sup>TM</sup> are published monthly during the last week of the month for the next month. They can be viewed on-line and an announcement is sent out when they are published.

Documents which are published as libraries are available at any time. From time-to-time new editions will be added to the libraries.

[Back to Top](#)

### **4. What subjects are covered?**

*The Real Estate Trends*<sup>TM</sup>, (one page) *Real Estate Update*<sup>TM</sup>, (four page) and *Real Estate Report*<sup>TM</sup>, (HTML) report on the latest news within the field of real estate: housing activity, economic commentary, legislation, new programs, mortgage programs and economic data. *The Sales Update*<sup>TM</sup> covers topics of interest to those who would like to increase their productivity. Some topics are specific to real estate sales and others are more general in nature. *The Real Estate Page*<sup>TM</sup> consists of articles on the subject of real estate. The articles are updated periodically.

*Notes on the relevancy of the topics:*

- We don't present recipes and handy homeowner hints because we are trying to present you as an expert. Do you get recipes from your CPA or Financial Planner?
- We don't include information that is "over the head" of readers such as complex economic or secondary charts. The articles and newsletters are written in plain English so that the average American will open and read them.

[Back to Top](#)

## **5. To whom can these pieces be distributed?**

The publications can be distributed to builders, title companies, potential homebuyers, present and previous customers, financial planners and any other targets of real estate companies. There is no limit to the amount of distribution. The program includes training on how to increase the size of your sphere.

[Back to Top](#)

## **6. Who is the author of the marketing material?**

The materials are written by Dave Hershman, an expert in the mortgage and real estate fields. Dave has authored several books, including two published by the Mortgage Bankers Association of America, and has been quoted in publications from coast-to-coast. Month after month Dave tackles hard-hitting topics that will keep your targets asking for more. Any material that is garnered from published sources will always be marked as such.

[Back to Top](#)

## **7. When is the best time to distribute these publications?**

Even though you will receive more than one publication at once, we suggest spreading the distribution out during the month. The Newsletter's should go out first because of the timely nature of the articles. For the *Sales Update*<sup>™</sup>, the day of a meeting with a referral source. *The Real Estate Page*<sup>™</sup> can be delivered at any time—for example, to help convert a prospect call.

[Back to Top](#)

## **8. What if I would like to customize the publication?**

When you receive your login information there will be instructions on how to add your photo, contact information and any other pertinent information you would like displayed in your weekly personalized Real Estate Report -- including disclosure language and logos. The monthly publications can be easily personalized as well using the PDF versions. *However, extensive editing requires the use of Microsoft Publisher.*

*The Sales Updates™ and Financial Pages™* will also be personalized automatically with the information from your profile.

[Back to Top](#)

## **9. Is the information going to be too technical for my business partners and customers to understand?**

Again, the goal is to make the information very readable for an audience that may not be particularly financially savvy. At the same time, we want to present you as an expert in so we don't include recipes or handy home owner hints. The information is packed with relevant, timely, thought-provoking news, rather than bland or overly basic blurbs your business partners could get just about anywhere. It is an important balance to give them expert information that is not over their heads. The great news is that Dave Hershman has been writing at the consumer level for over 30 years.

[Back to Top](#)

## **10. How do I use the Real Estate Report™ most effectively?**

Your personalized *Real Estate Report™* is designed to be easily forwarded by you every Tuesday morning. We recommend that you send it to all of your existing business partners, referral sources, previous customers, prospects and entire sphere to consistently add high value to these relationships, and heighten your status as their Trusted Advisor. As you pursue new referral sources, add these new prospects to your list as well. Explain to your recipients that you have invested in the *Real Estate Report™*, because you are committed to their success. You want to be the one to provide them with the high quality information they need to quickly and easily understand what is happening in the world of real estate.

[Back to Top](#)

## **11. How is the weekly HTML newsletter customized?**

It's easy – the RealtorPro team will provide you a personalized page that you can customize to your specification! You will simply log into your own personalized page and design according to your own personal preferences. You can add your own photo, logo, up to seven lines of contact information as well as disclosure logos and language. It is as simple as that. Note that the *Sales Update*<sup>™</sup>, the *Real Estate Report*<sup>™</sup> and the Create Your Own Emails and Special Occasion emails are personalized in the same manner.

[Back to Top](#)

## **12. What if I do not have a photo or logo?**

While the *Real Estate Report*<sup>™</sup> template looks best with your photo and logo in place, you can make your template with only contact information if this best suits your needs at this time.

[Back to Top](#)

## **13. Can I edit the marketing materials?**

You can edit the picture, logo or contact information as necessary, but the content of the marketing pieces, especially HTMLs should not be altered. The standardized formatting would be lost if the wording were changed. It is a very difficult balance to keep the format standard on a variety of browsers. However, you can:

- Include personal information before the HTML piece starts or after it ends. For example, a personalize message that says, “Below is the latest news...” Adding text before or after the newsletter will not affect the format.
- You may also alter print pieces if you have Microsoft Publisher. You even post this information on your web page or blog!
- Create custom HTML emails. The custom email builder will let you build a custom email and you will be able to cut and paste content from the other pieces and alter them as needed.

[Back to Top](#)

## **14. Can I share my subscription with others?**

While we encourage you to tell others about our service, you may not share your subscription with others. This is a personalized service designed for your individual use only. These newsletters contain copyrighted information, and may not be shared with

others unless you have made special contractual arrangements with us. If you have several co-workers with your company that would like to use the service, we provide *enterprise pricing* that will lower the cost for everyone! For further questions on this matter, please call us at **(800) 581-5678** or email [support@originationpro.com](mailto:support@originationpro.com).

[Back to Top](#)

## **15. Can I send to whomever I want?**

While there is no limit to distribution, please be aware that there are laws that prohibit faxing and emailing to those you don't know. Using these documents to "SPAM" is prohibited. It is also bad business because you may be blocked by servers and then will be prevented from reaching those you know. The system includes training that is focused upon teaching you to build your sphere. It is a best business practice to distribute your value to those within your sphere.

[Back to Top](#)

## **16. What is the target audience for the different marketing pieces?**

*The Real Estate Page*<sup>™</sup> - The use of *The Real Estate Page*<sup>™</sup> will vary depending upon the topic. It can also be used for joint mailings with other partners and for prospect conversion. For example, if an article is on first time homebuyers, when a prospect calls and is a first time buyer, you now have something of value to give them, increasing your chance of conversion to a client. Most of the topics are timeless (like *the Sales Updates*<sup>™</sup>), so you can keep them in archives as you need them.

*Real Estate Report*<sup>™</sup>, and *Real Estate Update*<sup>™</sup> - These newsletters are general newsletters that are appropriate for your entire sphere—present and previous customers, prospects, referral sources and more. It is written in consumer language but is all business without recipes and handy homeowner hints. Therefore it is still appropriate for high level business professionals.

*The Sales Update*<sup>™</sup> - *The Sales Update*<sup>™</sup> is for anyone who is running a business (B-to-B). The articles focus upon general business and sales. It will give you great topics for presentations. Plus they will give you great sales advice for your own business.

[Back to Top](#)