

This course has also received 8 hours of Mandatory Continuing Education Credit in the state of Texas, as well as other states in the country including, but not limited to Arizona, Wisconsin, Florida, Iowa, Georgia, Colorado, Tennessee, and Kentucky.

Course Objective: To educate real estate agents how to establish procedures and systems to provide consistent, accurate service to buyers and sellers using Microsoft Office (Word, Outlook, PowerPoint, and Excel).

By using Microsoft Office, which is industry standard software, agents can be more effective and accurate in their marketing materials that will help sellers to dispose of their property in a shorter time with fewer problems. The buyers will have better information to make informed decisions. Specific information will be delivered in Excel spreadsheet format that will clearly explain a variety of financial situations that will help both buyers and sellers to make good decisions

The public will benefit from the agent becoming more organized in keeping records such as contemporaneous notes about discussions with customers and clients, copies of written and e-mail correspondence, and providing complete descriptions of the steps necessary in the buying and selling process.

Pat Zaby
5023 Sea Pines, Dallas, TX 75287
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Name of Course: Marketing with Microsoft Office

Instructors: Pat Zaby

Course Learning Objectives: the student will be able to:

1. Provide a variety of information worksheets that will allow buyers and sellers to make better financial decisions.
2. Maintain their customer database in Outlook along with their e-mail so there will be records of correspondence.
3. Establish checklist procedures to ensure that all important steps are completed for selling or buying a home.
4. Minimize correspondence delays by utilizing more features of email.
5. Develop multimedia presentations to graphically explain the process of buying and selling a home.
6. Maintain a single calendar and address list on both their computer and PDA.

Method of Instruction: lecture, computer projector; student follows the outline that includes the step-by-step instructions how to do the variety of skills demonstrated in the class. The marketing application of each item covered is emphasized.

Timeline: 8 hours; there will be two 10 minute breaks in the morning and another two in the afternoon. There is a 25 question test at the end of the day.

Outlook

This commonly available tool is used not only for email but also for keeping track of customers and clients. This becomes a permanent record that can be backed up in case of loss unlike an appointment book or Day Timers. It can also be synchronized with a PDA for mobile use and maintain the exact same information with their computer.

Page	Topic	Objective	Hours
	Introduction	Explain the schedule, format, student manual	.25
2	Contact Window	Keep important information on customers and clients in an organized manner such as names, addresses, phone numbers, email addresses, etc.	.5
2	Notes section	Contemporaneous notes about conversations.	.125
4	Link records	This procedure shows how to link one record to another where there is a relationship	.125
6	Printing records	Can be placed in physical file folders for office managers and brokers	.125
8	Letter to contact		.125
9	Outlook Today	Benefit of having one place to survey appointments, tasks, and messages	.125
10	Appointments	How to schedule one and automatically send an email to confirm	.125
13	Tasks	Scheduling tasks to be done to complete a transaction insuring that they will be done on time	.125
13	Task list	Agents making lists of the important things that they need to do to complete transactions	.125
18	Signature file	Identifies the agent as a real estate agent with all of their information including license number if desired.	.5
20	Message addressing	Various ways to send a message to one or more related people	.25
26	Attachments	Various procedures for sending things like contracts, disclosures, pictures, etc.	.125
	Forward records	Various ways to forward a customer or clients contact information (with permission) to parties like a mortgage or title officer, or attorney.	.25
27	Flagging	Procedure for flagging a message that needs attention to complete an important task.	.125
29	Spell check	Making your messages look more professional and be more accurate	.125
30	User defined forms	Create forms that will be used on a regular basis rather than recreate them each time. Ex. – list needed for loan application, phone numbers for utilities, recommendations for allied professionals and services	.125
32	Read receipt	Procedure to getting an acknowledgement for an important notice, disclosure, or message.	.125
35	Newsletter	Description of how to create a periodical that provides valuable information to customers and clients	.125
Total time in hours			3.5

Word

Page	Topic	Objective	Hours
	Introduction	Explain the different types of documents that can be created in Word – letters, labels, postcards, flyers, presentations, & forms	.25
50-56	Creating and editing	Learning the basics about constructing documents to present consumer information	.25
53	AutoCorrect	Provide a quick and accurate method of inputting names	.125
56	Tables	Providing information to buyers and sellers in an easy to read format about the status of their transaction	.25
61	Protecting Documents	This procedure will help maintain the integrity of documents that are electronically transmitted by not allowing changes that might not be easily noticed.	.125
62	Inserting image	Put pictures on a page and move them	.125
66	Envelopes	Simple procedure for preparing an envelope to send buyers and sellers copies of documents pertaining to a sale	.125
Total time in hours			1.25

PowerPoint

Page	Topic	Objective	Hours
	Introduction	Explain the different uses for PowerPoint such as to make complete and clear presentations to buyers and sellers so that they understand the entire process.	.25
91	Steps in designing a presentation	Provide a step-by-step procedure for developing a new presentation	.125
	Listing presentation	Example of a listing presentation and what things should be included	.25
	Buyer presentation	Example of a buyer's presentation and what things should be included	.25
NIB	Demo	Demonstrate the process of building a presentation	.25
116-127	Creating and editing worksheets	Learning the basics about constructing worksheets to present financial information	.25
111	Pack 'N' Go	Develop a self-running presentation that can be distributed on a CD.	.125
Total time in hours			1.5

Excel

Page	Topic	Objective	Hours
	Introduction	Explain the different types of documents that can be created in excel to make projections regarding different financial aspects of buying and selling.	.25
116-127	Creating and editing worksheets	Learning the basics about constructing worksheets to present financial information	.25
129	Unpaid balance	Determine the current unpaid balance on an existing mortgage	.125
132	80-10-10 Mortgage	Show the financial impact of getting an 80% loan with a 10% second to avoid PMI and reduce monthly housing costs	.125
136	Mortgage Accelerator	Demonstrate how making regular principal contributions on a fixed rate mortgage will shorten the term while saving thousands in interest	.125
138	ARM vs FRM	Provide a projection showing the buyer when the breakeven point would occur if the ARM went up in interest each period compared to a fixed rate mortgage	.125
145	Rent vs. Own	Project a net cost of housing considering the tax savings, appreciation, and principal reduction	.125
147	Refinancing Analysis	Determine the feasibility of refinancing a mortgage based on recapturing the cost of refinancing	.125
Total time in hours			1.25

RESUME OF PETER N. (PAT) ZABY

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PROFESSIONAL DESIGNATIONS

BBA - University of North Texas; Real Estate
GRI - Graduate of REALTORS Institute®
CRS - Certified Residential Specialist®
CRB - Certified Real Estate Brokerage Manager®
CCIM - Certified Commercial Investment Member®

PROFESSIONAL QUALIFICATIONS

Texas Real Estate Brokers License
Active member of the National Association of REALTORS®
Active member of the Texas Association of REALTORS®
Active member of the Greater Dallas Board of REALTORS®
Active member of the REALTORS National Marketing Institute®
Senior Instructor for Council of Residential Specialists

BUSINESS ACHIEVEMENTS

New Software Product of the Year, 1996 NAR Trade Exposition
1996 recipient of the RNMI Quill Pen Award
President - REALTORS National Marketing Institute®, 1993
Recipient of Omega Tau Rho, National Association of REALTORS®, 1993
1992 NAR Educator of the Year Honorable Mention
President, Residential Sales Council, 1990
Consultant to Texas Instruments for development of BA Real Estate calculator
Developed & wrote RS 205 for the Residential Sales Council
President of Zaby/Smith, REALTORS®
Over 80 articles published in national real estate periodicals (1975-2000)
Senior instructor for the Council of Residential Specialists
Developed Summit Award for Greater Dallas Board of REALTORS®
Convention speaker at N.A.R.® for R.N.M.I.®, (1979-2003)
Convention speaker for numerous state Association of REALTORS®
Produced satellite programming for Realnet Direct Satellite TV, RETN, RSN
Developer of PREP™ Software
National Association of REALTORS® Board of Directors, 1993

Marketing with Microsoft Office

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BIOGRAPHY

Pat Zaby, CRS, CRB, CCIM

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Pat began his career in 1968 with a bachelor's degree in real estate from the University of North Texas. His contributions to the industry through speaking, teaching, writing, and development have earned him the recognition and respect as one of the industry's authorities.

He authors the largest and most widely read e-mail newsletter for real estate professionals found at www.PatZaby.com. He has been a speaker at every National Association of REALTORS' convention since 1979 as well as numerous franchise and state conventions.



Pat has been a REALTOR® since 1968 involved in all facets of real estate including residential and commercial, sales and management including his own multi-office company for 11 years. He has a bachelor's degree in real estate from the University of North Texas and holds four professional designations. He successfully developed software that over ten years became one of the leading agent productivity packages with over 20,000 users. His contributions to real estate as a national speaker, author, and developer have earned him the recognition and respect as one of the industry's authorities.

Achievements

President - REALTORS National Marketing Institute®, 1993
Recipient of Omega Tau Rho, National Association of REALTORS®
President, Council of Residential Specialists, 1990
Consultant to Texas Instruments for development of BA Real Estate calculator
Developed & wrote RS 205 for the Council of Residential Specialists
Recipient of the RNMI Quill Pen Award
Author – How Automate for More Listings and Sales
Over 180 articles published in national real estate periodicals (1975-2005)
Senior instructor for the Council of Residential Specialists
Convention speaker at the National Association of Realtors Convention (1979-2004)
Convention speaker for numerous state Association of REALTORS®
Produced satellite programming for Realnet Direct Satellite TV, RETN, RSN
Developer of PREP™ Software
New Software Product of the Year, 1996 NAR Trade Exposition
Author of one of the widest-read e-mail newsletters in the country
Developer of Marketing Library Collection