



*First American  
Title Insurance Company*

## **ProManage Training Agenda**

The ProManage Series consists of a total of four courses, consisting of a total of six sessions. We consider the first two courses to be the “core” materials for this series. Course 1 consists of one Session, “Setting Up Your Database”, while Course 2 contains the session “Lead Generation – Print Marketing and Consistent Follow-up”. Courses 1 and then 2 should be taken by all students.

After the core sessions, a student could take either Course 3 or Course 4, or both, in either order. Each course consists of two modules that have been logically grouped. All four courses are three hours in length. It is our plan that, with this curriculum, agents can and should become very proficient and effective with the ProManage program, and will learn to use Top Producer to a much fuller degree.

*Steve Nachlas  
Director of Applied Technology  
First American Title*

### ***ProManage Course One – 3 hrs***

#### **Getting Started - Setting up Your Database**

- Why Having a Database is Important - "Your Business is Your Database"
- How to Setup Top Producer for the First Time
- How to Add Prospects and Clients into the Database
- How to Search and Find Clients and Prospects
- Scheduling Follow-ups
- Introduction to Action Plans

### ***ProManage Course Two – 3 hrs***

#### **Lead Generation - Print Marketing and Consistent Follow-up**

- Consistent Communication is the Key to Success
- How to Use Today's Business
- How to Create and Edit Print-Based Marketing Materials
- How to Apply Action Plans
  - 12 Direct - "Haven't Mets" and Farms
  - 8x8 - "Have Mets"
  - 33 Touch - "Have Mets" and SOI
- How to Use the Scheduler and Other Follow-up Reminders

## ***ProManage Course Three – 3 hrs***

### **Lead Generation - Email, Call Capture/IVR and Internet Marketing**

- How to Leverage Results from the Internet and Telephone Leads
- How to Use the TP Email Manager for Individual Email
- How to Send Mass Email Messages to Contact Groups
- How to Apply Automated Drip Campaigns Using the Action Planner
- How Call Capture and Website Forms Can Leverage Lead Capture

### **F.A.S.T. - Capturing Incoming Leads**

- Understanding How "F.A.S.T." Leverages Time and Resources
- How to Funnel Leads Through the Leads Manager
- How to Assign Leads to Various Team Members for Follow-up
- Using the Source Feature Effectively to Track Marketing Campaigns
- Tracking Referral Leads Through the Referral Manager

## ***ProManage Course Four – 3 hrs***

### **Converting Leads - Target Presentations**

- Understanding That Personalized and Quality Presentations Make a Difference
- How to Personalize and Use the ProManage Pre-listing and Full CMA Presentations
- How to Use the Presentations for Marketing Prospects Within Their 8x8 Campaigns
- How to Publish Presentations to the Internet to be Used in Email and on Websites
- How to Use the Top Connector Module to Automatically Download Comparable Property Information into Presentations

### **Servicing Listings and Managing Closings**

- How to Use an Automated System to Track and Manage Transaction Activities
- Using the 14-Step Listing Action Plan to Track Promised Marketing Activities
- Creating Property Flyers and Marketing Materials
- Utilizing the Today's Business Section to Leverage Tasks and Manage Multiple Reminders
- Collecting and Creating Seller Marketing Reports
- Tracking Closed Business Statistics and Updating the Referral Manager