

HAR CRM– Mastering the Basics

CE hours: 2
Course #: 13655-RECE



Houston Association
of REALTORS®

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Course Objective

The HAR CRM Mastering the Basics is designed to introduce Realtors® to the HAR CRM platform. Participants will learn the fundamentals of CRM use, explore its benefits, and gain hands-on experience with key features, including onboarding, menu navigation, and importing contacts. By the end of the class, participants will be equipped to navigate the platform, understand its core functions, and start building their CRM database.

Introductions and Course Overview

- Course Expectations
- CE Requirements

What is a CRM, How to Use It, and What Are the Benefits?

- Defining CRM
- How a CRM Helps Real Estate Professionals
- Key Benefits for Realtors®
- Why HAR CRM?

Onboarding Mastery and Profile Setup

- Completing the Onboarding Process

Menu Navigation and Introduction to Key Tools

- Navigating the Platform's Menu
- Demonstrating Key Tools and Features

Importing Contacts

- Importing Contacts into the CRM
- Organizing Contacts During Import
- Best Practices for Organizing Contacts

Support & Training Engagement

- Accessing Available Technical Support Resources
 - Accessing Video Tutorials and Additional Training
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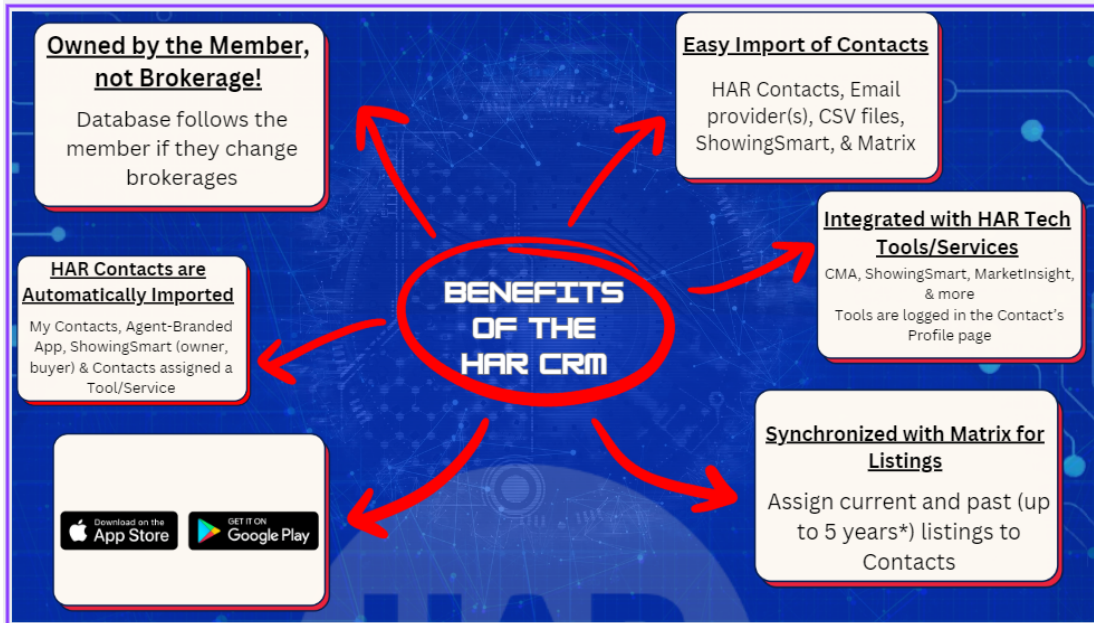
Course/Manual Overview

1. Introductions and Course Overview

- **Course Expectations:**
 - Overview of course content and objectives.
 - Introduction to CRM and its relevance to Realtors®.
- **CE Requirements:**
 - Overview of Continuing Education (CE) credits available for this course.

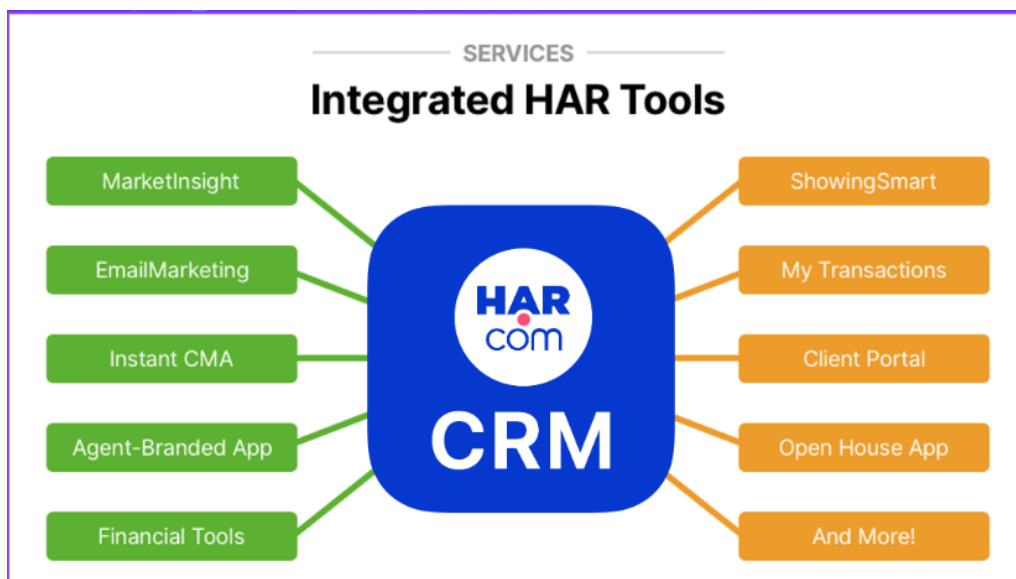
2. What is a CRM, How to Use It, and What Are the Benefits?

- **Defining CRM:**
 - Create a database and compile contact records
 - Categorize contacts to personalize communication
 - Automate marketing and branding communications
 - Schedule follow-up activities
 - Track and record notes of communications with prospects and clients
 - Coordinate active client communications
 - Track referrals, response rates, click-through rates, and opens
- **How a CRM Helps Real Estate Professionals:**
 - Streamlined client management
 - Improved communication
 - Data organization and accessibility
 - Lead tracking and management
 - Automated task management
 - Marketing and campaign management
 - Transaction management
 - Analytics and reporting
- **Key Benefits for Realtors®:**
 - HAR Contacts are automatically Imported
 - Owned by the member, not the brokerage
 - Easy Import of contacts
 - Improved client relationship management
 - Efficient lead tracking
 - Better organization of client data
 - Automated follow-up reminders
 - Streamlined marketing efforts
 - Insightful analytics and reporting



• **Why HAR CRM?**

- Included as part of your Platinum Membership
- You own your contacts, not your brokerage
- Integrated with MATRIX for seamless property data access
- Connected with ShowingSmart for efficient showing management
- Tailored specifically for real estate professionals
- User-friendly interface designed for ease of navigation
- Robust features to enhance client engagement and communication
- Centralized platform for managing leads and transactions
- Access to ongoing support and training resources



3. Onboarding Mastery and Profile Setup

- **Completing the Onboarding Process:**
 - Step-by-step guidance on setting up your HAR CRM account and profile.

WHERE TO GO TO ACCESS

Members Only Portal **HAR CRM**

HAR 2025 Board of Directors Election
The Results are In!
[Election Results](#) [VIEW RESULTS](#)

Try HAR CRM Beta Now!
Exclusively for Platinum Subscribers
[Learn more →](#)

The Reality of Real Estate
Get the facts about the HAR settlement and how real estate will be changing.
[For Realtors®](#)
[Consumer Campaign](#)

Check Out HAR's New Technology Tools and Features
[Learn more →](#)

Where to search: **Members Area** | Search: Enter any keyword [SEARCH](#)

HAR CRM

Simple way to organize your leads, contacts, emails and more.

Username:

Password: [Show/Hide](#)

If you forgot your password, please [contact support team](#).

[Sign In](#)

HAR CRM **CRM Onboarding**

HAR Contacts

Your contacts from the HAR Members Only Area are accessible through your CRM. These include the contacts you've cultivated over the years through various applications such as the LeadsMagnet tools, the Booking App, LeadPages, LeadConnect, and more.

[Set up your CRM](#) [Skip](#)

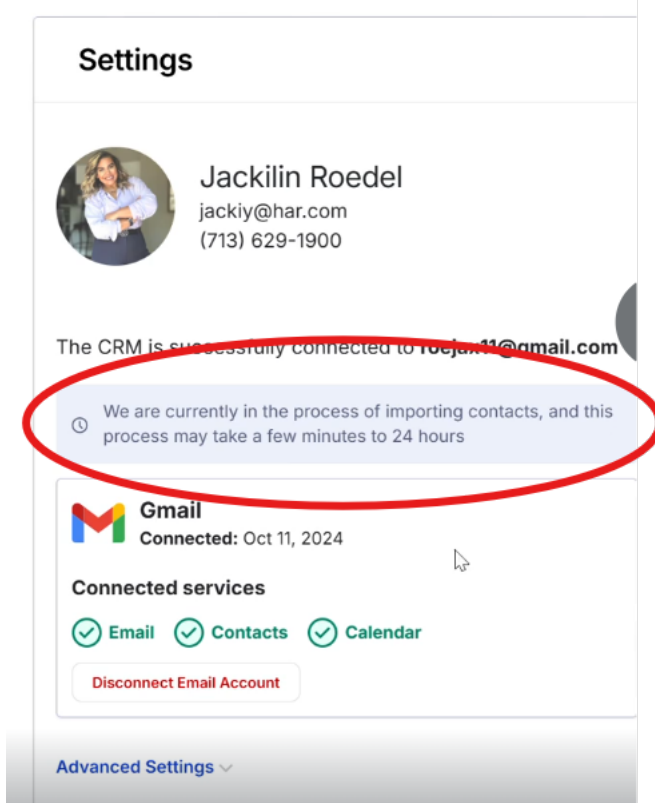
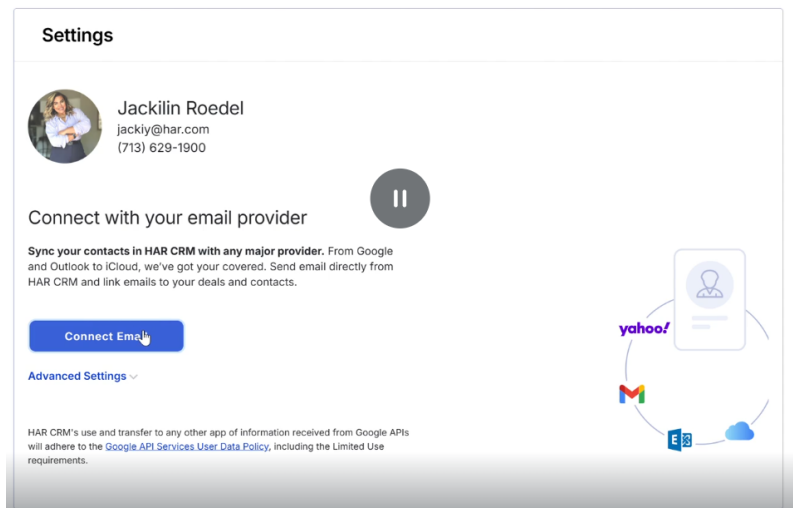
WELCOME TO **HAR CRM**

Get Started...

Jackilin Roedel
jackiy@har.com
(713) 629-1900

Progress bar: 1. Welcome (checked), 2. Getting Started (active), 3. Connect, 4. Import, 5. Done

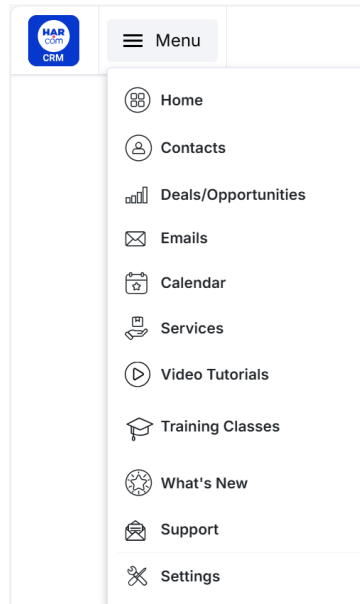
[Let us connect with your email provider](#) [Skip](#)



- **Creating a Solid Foundation:**
 - Importance of fully completing your profile for optimal integration with CRM features.

4. Menu Navigation and Introduction to Key Tools

- **Navigating the Platform's Menu:**
 - Overview of the CRM's main menu: Home, Contacts, Deal/Opportunities, Emails, Calendar, Services, Support, and Settings



- Understanding the purpose of each section.
- **Demonstrating Key Tools and Features:**
 - Walkthrough of tools such as Contact Management, Email Marketing, and Transaction Tracking.

5. Importing Contacts

- **Importing Contacts into the CRM:**
 - Instructions on importing contacts from various sources (CSV, Gmail, vCards).

- Selecting the appropriate import method based on your existing database.

The 'Import Contacts' dialog box contains the following sections:

- Direct CSV Upload:** Includes an 'Upload CSV' button.
- Matrix Contacts:** Includes an 'Import from Matrix' button.
- Email Provider Contacts:** Includes an 'Import' button and a Google logo.
- Mobile Phone Contacts:** Includes the text 'Use your Mobile Device for Import'.

- **Organizing Contacts During Import:**

- Best practices for tagging and categorizing contacts upon import.

Filters

The 'Filters' section includes the following criteria:

- Location:**
 - City:
 - Zip Code:
- Last Updated:**
 -
- Stages:**
 - ☐ New
 - ☐ Qualified
 - ☐ Cold
 - ☐ Warm
 - ☐ Hot
 - ☐ Active
 - ☐ Closed
 - ☐ None
- Deals/Opportunities:**
 - ☐ Active/Offers
 - ☐ In Contract
 - ☐ Closed
 - ☐ Expired / Terminated
 - ☐ No Deals
- Scores [?]:**
 -
 -
 -
 -
 -

- **Best Practices for Organizing Contacts:**

- Strategies for categorizing contacts for targeted follow-up (leads, buyers, sellers, etc.).

6. Support & Training Engagement

- **Accessing Available Technical Support Resources:**
 - Overview of support options (live chat, email, phone).
 - Troubleshooting common issues with the CRM.
 - **Accessing Video Tutorials and Additional Training:**
 - How to find and utilize video tutorials for step-by-step learning.
 - Registration for additional webinars or in-person training opportunities.
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Conclusion

By participating in this HAR CRM Mastering the Basics, Realtors® will develop foundational skills to effectively use the HAR CRM platform, ultimately enhancing their client management practices and business efficiency. Remember to engage with available resources for ongoing support and training!