

# HAR CRM– Advanced Features

CE hours: 2  
Course #: 13654-RECE



Houston Association  
of REALTORS®

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## Course Objective

Welcome to HAR CRM Mastery! This dynamic course is designed for Realtors® who want to level up their CRM game. Get ready to dive deep into the advanced features of HAR CRM, where you'll discover how to match services perfectly to your clients' needs, analyze service performance, and boost your engagement strategies. By the end of this course, you'll not only understand the ins and outs of HAR CRM's powerful tools but also have the skills to optimize your client interactions and take your real estate business to new heights!

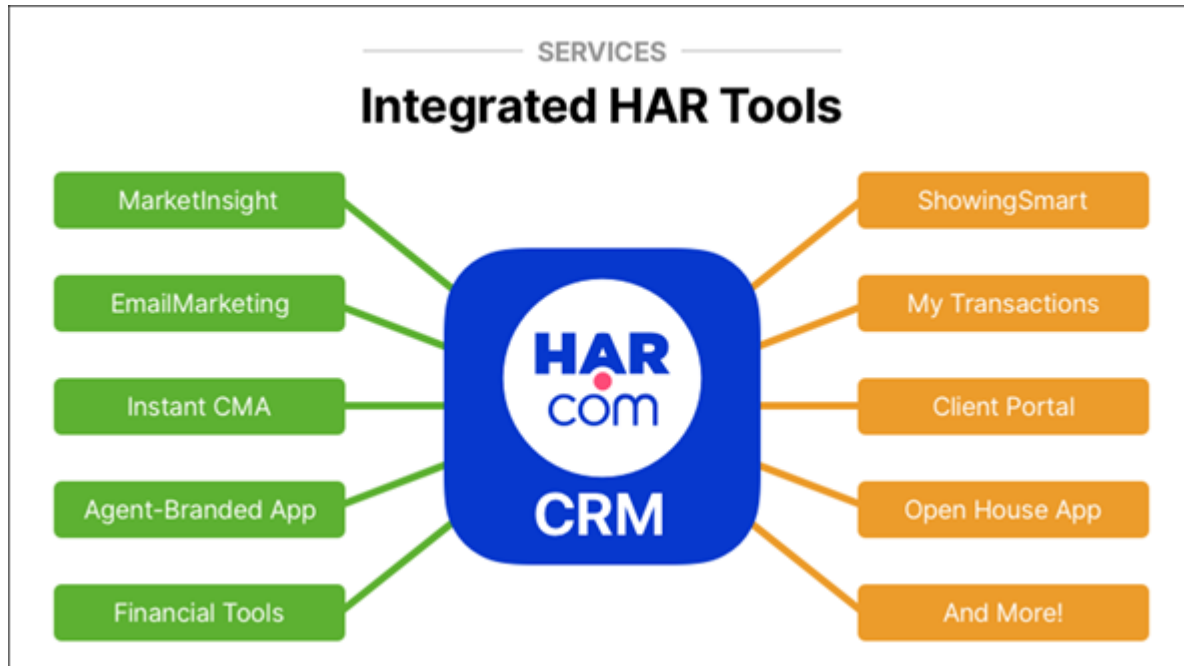
## Course/Manual Overview

### 1. Introductions and Course Overview

- **Course Expectations:**
  - Overview of course content and objectives.
  - Recap of the foundational concepts from the previous session and how they relate to today's advanced topics.
- **CE Requirements:**
  - Overview of Continuing Education (CE) credits available for this course.

### 2. Determining the Right Services for Clients

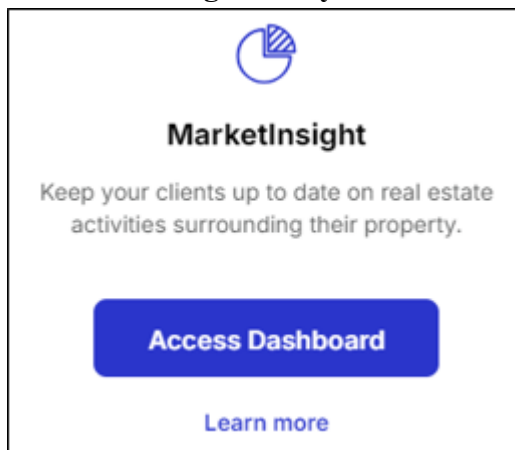
- **Assessing Client Needs:**
  - Techniques for evaluating client goals (buying, selling, investing) and how to tailor services accordingly.
- **Overview of HAR CRM Services:**
  - Explore tools such as MarketInsight, EmailMarketing, My Transactions, CMA Report, ShowingSmart, and Client Portal.



- Discuss how each tool serves different client profiles (buyers, sellers, investors).

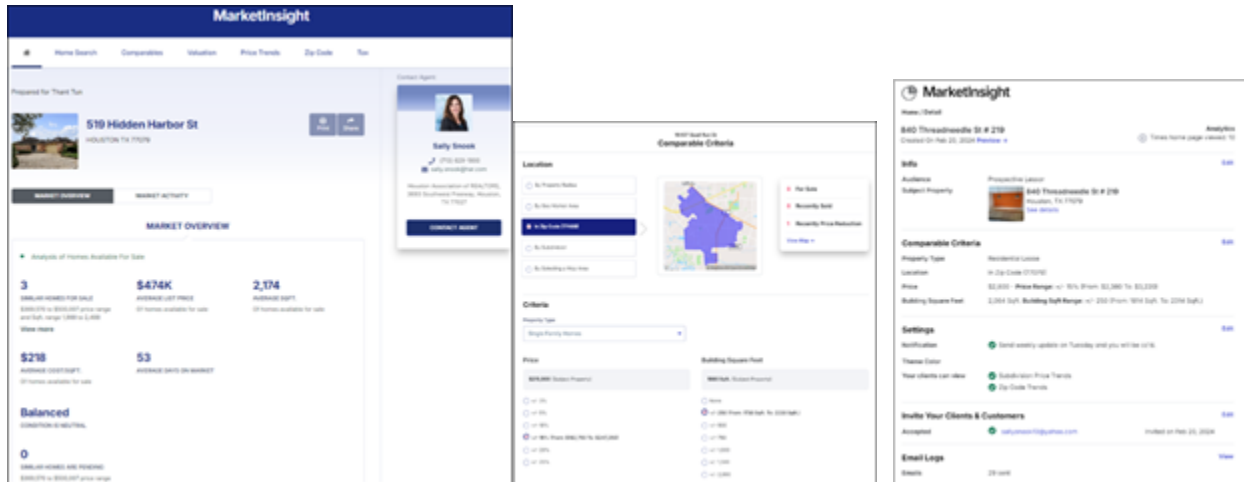
### 3. Reviewing Analytics of Services

- **MarketInsight Analytics:**

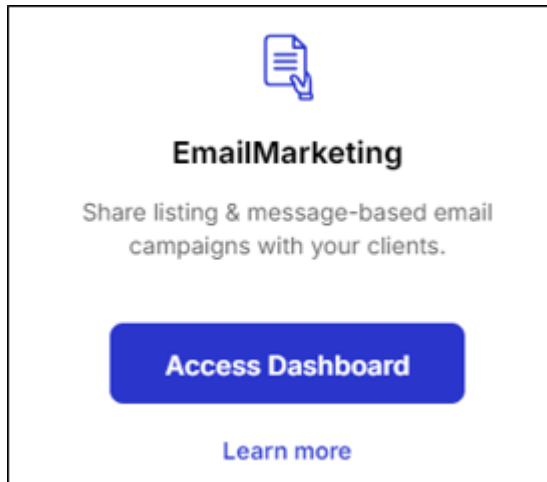


- o A MarketInsight report showcases up-to-date market trends around:
  - § a current listing for sellers (listing presentation)
  - § a specific property for a specific client
- Learn how to interpret market data and trends to inform client decisions.
- o Customizable
  - § Price trends (city & zip)
  - § Comps based on location, property type, ft2, price, etc.
- o Configured to send weekly or monthly

- o Logged in a Contact's Profile in the HAR CRM



- **EmailMarketing Analytics:**
  - Discover how to evaluate campaign effectiveness, including open rates and click-through rates.



- **Message-based campaigns**
  - o 28 AI-created messages
  - o Text is editable
- **Listing-based campaigns**
  - o Share up to 9 listings
  - o Text is editable
- Logged in a Contact's Profile in the HAR CRM

19 Campaigns				
<b>Matt B</b> <span>Finished</span> Multiple Listings	Stone Creek Ranch (1 Subscribers)	Sep 09, 2024 Last Modified	Sep 09, 2024 Sent on	
<b>Rhonda W</b> <span>Finished</span> Multiple Listings	Instructors (3 Subscribers)	Aug 28, 2024 Last Modified	Aug 28, 2024 Sent on	
<b>Ivette</b> <span>Finished</span> Multiple Listings	CRM Users (6 Subscribers)	Jun 06, 2024 Last Modified	Jun 06, 2024 Sent on	

### Campaign Report

Rhonda W Statistics  
Total View 8

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**Info**

Type: Message-based  
 Last Updated: Aug 28, 2024 02:53 PM  
 Status: Finished

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**Email Delivery**

Sender Name: Sally Snook  
 Reply To: sally.snook@har.com  
 Subject: Property Investment Opportunities  
 Scheduled for: Aug 28, 2024 05:53 PM  
 Completed on: Aug 28, 2024 05:55 PM

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**View Performance** View Log →

Average View rate\*: 100%  
 Total Views: 8  
 Unique Views: 3  
 Last Viewed: Sep 14, 2024 9:10:53 PM

\*View rate is a measure that tells you how many delivered emails were viewed by subscribers.

### Click Performance

Average click rate\*: 0%  
 Total Click: 0  
 Unique Click: 0  
 Last Clicked: -

\*Click rate is a measure of how many people clicked on the links in your email campaign.

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**Audience**

Total Subscribers (All lists): 3  
 Delivered Emails (Unique): 3  
 Pending Emails: 0  
 Unsubscribed: 0  
 Selected Recipient List: Instructors (3 Subscribers)

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**Subscribers**

DELIVERED EMAILS (3) PENDING EMAILS (0)

Scheduled Email	alisha.holt@har.com <small>Email</small>	Alisha Holt <small>Name</small>
Scheduled Email	melinda.burkman@har.com <small>Email</small>	Melinda Burkman <small>Name</small>
Scheduled Email	taqj.rizvi@har.com <small>Email</small>	Taqj Rizvi <small>Name</small>

- **CMA and Client Portal Analytics:**
  - Use these reports for pricing strategies and improving client interactions.

## 4. Hands-On Walkthrough of HAR CRM App



- **Live App Walkthrough:**
  - Step-by-step demonstration of the HAR CRM app, including:
    - Navigating the dashboard and accessing key features.
    - Assigning services to contacts in real-time.
    - Reviewing service analytics and client data.
    - Utilizing MarketInsight, EmailMarketing, and Client Portal on the app.

## 5. Final Discussion and Q&A

- **Recap of the Course:**
  - Summarize key takeaways from the session.
- **Open Q&A Session:**
  - Opportunity for participants to ask questions and seek clarification on effectively using HAR CRM features.

## Conclusion

By participating in HAR CRM Mastery, Realtors® will develop advanced skills to effectively leverage HAR CRM's features. This training will enhance your client management practices, boost engagement, and ultimately improve your business outcomes. Don't forget to utilize the resources available for ongoing support and training as you continue your journey to CRM excellence!

