

e-PRO® Certification Program:
Day 1 Suggested Timed Outline

Suggested Timed Outline		Duration
8:30 am – 8:50 am	Introduction	20 minutes
	Welcome	5 min
	How to Earn NAR's e-PRO® Certification	2 min
	Why e-PRO® Is More Relevant Than Ever	3 min
	What You Will Learn	10 min
8:50 am – 9:30 am	1. Getting to Know the Digital Consumer	40 minutes
	Competing to Connect in a Digital Age	10 min
	Reaching Consumers Early in the Process	10 min
	The Power of the Long Tail	10 min
	Hub and Spokes	10 min
9:30 am – 10:15 am	2. Optimizing Your Hub	45 minutes
	Key Components of Your Hub	10 min
	Insights Into You and Your Expertise	5 min
	Useful Local Content	10 min
	Property Search Functionality	10 min
	Calls to Action	5 min
	(Optional) "Squeeze," Pop Up or Landing Page	5 min
10:15 am – 10:30 am	Break	15 min
10:30 am – 11:15 am	3. Aligning Your Spokes: Owned Content	45 minutes
	What Is Owned Content?	10 min
	Types of Owned Content	10 min
	The Content Dilemma: What Should You Create?	10 min
	Intellectual Property Rules	10 min
	Practitioner's Perspective: Terry Watson	5 min
11:15 am – 12:00 pm	4. Aligning Your Spokes: Social Media	45 minutes
	Why Social Media Is More than Facebook	10 min
	Understanding Where Your Best Social Space Might Be	10 min
	Choosing Where to Invest Your Time and Efforts	10 min
	Social Media Marketing is Social	10 min
	Identify Your Audience	5 min

12:00 pm – 1:00 pm	Lunch	60 minutes
1:00 pm – 1:45 pm	4. Aligning Your Spokes: Social Media	45 minutes
	The Rules of Engagement	10 min
	Social Objects, Social Contracts, and Social Capital	10 min
	Social Media Deep Dive	10 min
	Monitoring Your Online Reputation	10 min
	Protecting Your Online Reputation	5 min
1:45 pm – 2:30 pm	5. Aligning Your Spokes: Paid Online Advertising	45 minutes
	Search Engine Marketing	10 min
	Search Engine Optimization	10 min
	Online Advertising	10 min
	Paid Online Lead Generation	15 min
2:30 pm – 2:45 pm	Break	15 minutes
2:45 pm – 3:45 pm	6. Converting Leads and Managing Clients	60 minutes
	Executing Against the Opportunity	15 min
	Effective Email Marketing	15 min
	CAN-SPAM	10 min
	Managing the Paper(less)	10 min
	Transaction Management – My Way or Your Way?	10 min
3:45 pm – End of Day	Must-Have Apps and Summing Up Day 1 Discussion/Questions	45 minutes

e-PRO® Certification Program:
Day 2 Suggested Timed Outline

Suggested Timed Outline		Duration
8:30 am – 8:40 am	Introduction to Data Privacy Test Your Data Privacy IQ	10 minutes
8:40 am – 9:20 am	7. The Importance of Data Privacy and Security	40 minutes
	Data Breaches—Everyday, Everywhere, Everyone	10 min
	What Do Consumers Think About Data Security	5 min
	Could It Happen Here?	10 min
	Your Data Spheres	5 min
	How Does Your Business Receive Information?	10 min
9:20 am – 10:05 am	8. Data Privacy and the Human Dimension	45 minutes
	Just One Click!	5 min
	How Security Breaches Happen	40 min
10:05 am – 10:20 am	Break	15 minutes
10:20 am – 10:50 am	8. Data Privacy and the Human Dimension	30 minutes
	Use Your Tech Smarts	5 min
	Prevention, Policy, Preparation	5 min
	Security Practices of Service Providers	5 min
	Internet Field Trip	15 minutes
10:50 am – 11:35 am	9. Know the Law	45 minutes
	Federal Laws	5 min
	State Laws	10 min
	Internet Field Trip: State Laws	20 min
	Developing a Privacy Policy	5 min
	NAR Data Best Practices	5 min
11:35 am – 12:35 pm	Lunch	60 minutes
12:35 pm – 1:50 pm	10. Creating a Data Privacy Program	75 minutes
	5 Key Principles	5 min
	1. Take Stock	10 min
	2. Scale Down	10 min
	3. Lock It	10 min
	4. Pitch It	10 min

	Creating a Document Retention Policy: 7 Steps	10 min
	5. Plan Ahead	10 min
	Maintaining a Data Security Program Checklist.	5 min
	Employee Training for Data Security	5 min
1:50 pm – 2:20 pm	11. Managing a Data Breach	30 minutes
	Cost of a Data Breach	5 min
	Detecting a Data Breach	5 min
	Responsibilities for Responding to a Data Breach	5 min
	What To Do Next	5 min
	Collect Information About the Data Breach	5 min
	Look at the Big Picture	5 min
2:20 pm – 2:35 pm	Break	15 min
2:35 pm – 3:05 pm	11. Managing a Data Breach	30 minutes
	Notifications	5 min
	Internet Field Trip: Security Breach Notification Laws	15 min
	Can Lessons Be Learned?	5 min
	What Happens to Stolen Data—The Dark Web	5 min
3:05 pm – 3:50 pm	12. Online Safety for You and Your Home	45 minutes
	Five Steps for Data Security at Home	5 min
	Creating Secure Passwords	5 min
	Email Security	5 min
	Mobile Phone Security	5 min
	Social Media Safety	5 min
	Data Privacy Issues for Children	5 min
	Internet of Things (IoT)—New Security Challenges?	5 min
	Summing It Up & Resources	10 min
3:50 pm – End of Day	Exam (if required) Final Questions/Discussion	60 minutes

e-PRO[®] Certification Course Description and Topic Outline

Course Description

The first part of the program provides high-level digital marketing theory, with practical suggestions for its consistent implementation. You will examine the modern consumer and discover how to capture and convert these prospects into clients. You will dive into an overall online marketing strategy that includes how to use content to engage consumers.

Using the concept of the Hub and Spokes online marketing model, you will learn how to optimize your primary web-based presence (your hub) and align your other online marketing activities (your spokes) to connect with modern consumers and convert them into clients.

You will also discover where to focus your efforts in social media and how to develop a consistent and sustainable content creation strategy. This course provides a thorough overview of social networks like Facebook, Twitter, and LinkedIn as well as image-focused social networks like Instagram and Pinterest. Intellectual property rules will also be covered, and online advertising and paid marketing will be touched upon.

In addition to using technology to market your business, market your listings and connect with clients, technology is used throughout the buying and selling process. When home buyers and sellers do business with real estate professionals, they trust that the information they share will be kept confidential – so it is up to you to protect your clients' data and protect it from data breaches.

In the second half of the course you will learn about the importance of data privacy and security as well as how to develop data privacy policies and procedures and fulfill legal responsibilities created by a data breach.

Learning Objectives

Chapter 1: Getting to Know the Digital Consumer

- ▶ Identify the concept of the Zero Moment of Truth and how to connect with the modern consumer early during their initial real-estate related internet searches.
- ▶ Recognize the challenge of being found online and how to create content that captures the power of the “long tail” to drive traffic to your online web presence.
- ▶ Learn about the hub-and-spokes strategy to streamline your marketing efforts and increase the impact of your digital presence.

Chapter 2: Optimizing Your Hub

- ▶ Communicate the important and centralized role that your hub plays in your marketing efforts.
- ▶ Describe how to optimize your hub to include content that demonstrates your expertise as well as your personality and interests.
- ▶ Recognize the power of high-quality, locally relevant content and how it drives traffic to your website hub.

Chapter 3: Aligning Your Spokes: Owned Content

- ▶ Learn how to use owned content such as blogs, photos, and videos to connect with consumers while providing information they seek on the quality of life in your area.
- ▶ Identify which of the types of content you should create for your hub and spokes and publish in a consistent and authentic way.
- ▶ Recognize the Intellectual Property rules related to creating and publishing online content.
- ▶ Learn how to uphold the NAR Code of Ethics in your digital marketing efforts.

Chapter 4: Aligning Your Spokes: Social Media

- ▶ Identify the strengths, weaknesses, opportunities, and threats of each social network and which ones are best for you.
- ▶ Recognize the rules of engagement online and how to use social objects to build social capital in your online interactions.
- ▶ Follow best practices for using the different social media platforms to engage and convert clients.
- ▶ Formulate how to take better photos and videos in your marketing activities.
- ▶ Decide how to monitor and manage your online reputation.

Chapter 5: Aligning Your Spokes: Paid Online Advertising

- ▶ Distinguish the difference between Search Engine Marketing and Search Engine Optimization and why both are important.
- ▶ Learn why digital display ads and social media advertising are also useful tools to drive traffic to your hub.
- ▶ Illustrate SEM and SEO strategies that can help you take advantage of the power of the Long Tail.

Chapter 6: Converting Leads and Managing Clients

- ▶ Learn how to be more responsive when opportunities come your way.
- ▶ Recognize how to use email to reach large audiences and comply with CAN-SPAM in all your email campaigns.
- ▶ Illustrate useful programs to manage the paperless process.
- ▶ Identify applications that can make you more efficient and productive.

Chapter 7: The Importance of Data Privacy and Security

- ▶ Raise awareness of the possibility of a data breach.
- ▶ Relate data privacy issues to real estate business.
- ▶ Identify data spheres – how a real estate professional receives and shares data.

Chapter 8: Data Security Technology and the Human Dimension

- ▶ Identify habits that create data privacy weak points.
- ▶ Protect transmission of data when working outside the office.
- ▶ Identify common risk factors created by relationships with vendors and service providers.

Chapter 9: Know the Law

- ▶ Define basic concepts and terms relating to data privacy and security.
- ▶ Identify aspects of state and federal laws regarding data privacy and security that affect real estate organizations and businesses.
- ▶ Apply sound principles and knowledge of current laws to the development of a data security plan.

Chapter 10: Creating a Data Privacy Program

- ▶ Recognize basic documents, technologies, and concepts involved in creating a data security plan.
- ▶ Describe processes involved in creating a security plan.
- ▶ Apply knowledge of the Federal Trade Commission's key principles and other best practices to the development of a data privacy and security plan.

Chapter 11: Managing a Data Breach

- ▶ Learn signs that indicate the possibility of a data breach.
- ▶ Follow procedures including state laws for managing a data breach.
- ▶ Communicate with those who might be impacted by a data breach.

Chapter 12: Online Safety for You and Your Home

- ▶ Learn methods for securing your personal data.
- ▶ Learn how to secure passwords.
- ▶ Recognize scams that attempt to steal personal data.

Topic Outline

Introduction

- A. Welcome
- B. How to Earn NAR's e-PRO[®] Certification
- C. Benefits
- D. Why e-PRO[®] Is More Relevant Than Ever
- E. What You Will Learn

Chapter 1: Getting to Know the Digital Consumer

- A. Competing to Connect in a Digital Age
- B. Reaching Consumers Early in the Process
 - 1. The Power of the Long Tail
- C. Hub and Spokes

Chapter 2: Optimizing Your Hub

- A. Key Components of Your Hub
 - 1. Insights Into You and Your Expertise
 - 2. Useful Local Content
 - 3. Property Search Functionality
 - 4. Calls to Action
 - 5. Optional "Squeeze," Pop Up or Landing Page

Chapter 3: Aligning Your Spokes: Owned Content

- A. What is Owned Content?
- B. Types of Owned Content
- C. The Content Dilemma: What Should you Create?
 - 1. Photo
 - 2. Written Blogs/Website Content
- D. Intellectual Property
 - 1. Plagiarism
 - 2. Proper Attribution
 - 3. Copyright
 - 4. Fair Use
 - 5. Requesting Permission
 - 6. Respecting Others Content and Protecting Yours
 - 7. Website and Blogging Policies
 - 8. REALTOR[®] Code of Ethics
 - 9. Protect the REALTOR[®] Trademark

Chapter 4: Aligning Your Spokes: Social Media

- A. Why Social Media is More Than Facebook
- B. Understanding Where Your Best Social Space Might Be
- C. Choosing Where to Invest Your Time and Efforts
 - 1. Social Media Marketing is Social
- D. Identify Your Audience
- E. The Rules of Engagement
 - 1. Listen
 - 2. Comment
 - 3. Create
 - 4. It's Nice to Meet You
- F. Social Objects, Social Contracts, and Social Capital
 - 1. Social Objects
 - 2. Social Contracts
 - 3. Social Capital
- G. Social Media Deep Dive
 - 1. Facebook Personal Profile
 - 2. Facebook Business Pages
 - 3. LinkedIn
 - 4. Twitter
 - 5. Pinterest
 - 6. Video
- H. Monitoring Your Online Reputation
 - 1. Word of Mouth or Earned Marketing
 - 2. What are Others Saying About You?
 - 3. Google Alerts
 - 4. Online Identity Calculator
 - 5. Rankings
 - 6. Ratings and Reviews
 - 7. Agent Reviews on Major Portals
 - 8. Getting Reviews
 - 9. Client Surveys
 - 10. Protecting Your Reputation
 - 11. Internet Trolls and Flamers
 - 12. Online Conflicts

Chapter 5: Aligning Your Spokes: Paid Online Advertising

- A. Search Engine Marketing
 - 1. AdWerx
- B. Search Engine Optimization
 - 1. Be Descriptive in Titles
 - 2. Keywords
 - 3. Backlinks and Interlinks
 - 4. Captions and Alt-Text
 - 5. Register with Web Directories
- C. Online Advertising
 - 1. Google Display Ads
 - 2. Facebook/Instagram Ads and Sponsored or “Boosted” Posts
 - 3. Zillow, Trulia, and REALTOR.com Paid Ads
 - 4. SmartZip
- D. Paid Online Lead Generation

Chapter 6: Converting Leads and Managing Clients

- A. Executing Against the Opportunity
 - 1. Response
- B. Effective Email Marketing
 - 1. CAN-SPAM
- C. Managing the Paper (less)
 - 1. Transaction Management: My Way of Your Way?
 - 2. Alternatives to Dedicated Transaction Management Platforms
- D. Alternatives to Dedicated Transaction Management Platforms
- E. Must- have Apps

Chapter 7: Importance of Data Privacy and Security

- A. Test Your Data Privacy IQ
- B. Data Breaches – Everyday, Everywhere, Everyone
 - 1. Accidental Exposures
 - 2. Small Companies Are Targets Too
- C. What Do Consumers Think About Data Security
 - 1. Could it Happen Here?
- D. Your Data Spheres
- E. How Does Your Business Receive Information?
 - 1. What Information is Collected and Why?

Chapter 8: Data Privacy and the Human Dimension

- A. Just One Click!
- B. How Security Breaches Happen
 - 1. Risk: Phishing Attacks
 - 2. Risk: Business Email Compromise
 - 3. Risk: Weak Passwords
 - 4. Risk: Social Media – Fake Accounts and Bots
 - 5. Risk: Insider Attacks
 - 6. Risk: Lost Laptops and Phones, BYOD
 - 7. Risk: Unsecured Networks
 - 8. Risk: Paper Files
- C. Use Your Tech Smarts
- D. Prevention, Policy, Preparation
 - 1. Training
 - 2. Set Policies
 - 3. Data Permission Levels
 - 4. Empower Employees to Check
 - 5. Reporting Incidents
- E. Security Practices of Service Providers
 - 1. Why is this Important?

Chapter 9: Know the Law

- A. Federal Laws
 - 1. Monitoring, Alerts, Information
- B. State Laws
 - 1. What is “Personal Information”
 - 2. Why Is this Important?
- C. Developing a Privacy Policy
- D. NAR Data Best Practices

Chapter 10: Creating a Data Privacy Program

- A. 5 Key Principles
- B. 1. Take Stock
- C. Data Inventory: Who, What, Where
- D. 2. Scale Down
- E. 3. Lock It
 - 1. Physical Security
 - 2. Electronic Security

- F. 4. Pitch It
 - 1. Paper Documents
 - 2. Electronic Storage Media
 - 3. Old Computers
 - 4. Electronic Documents – Is it Really Deleted?
- G. Creating a Document Retention Policy: 7 Steps
- H. Document Retention Guidelines
- I. 5. Plan Ahead
 - 1. Maintain, Monitor, Modify
 - 2. Data Breach Response Plan
- J. Maintaining a Data Security Program Checklist
- K. Employee Training for Data Security
 - 1. Training Resources

Chapter 11: Managing a Data Breach

- A. Cost of a Data Breach
 - 1. Ransomware – To Pay or Not to Pay?
- B. Detecting a Data Breach
 - 1. Common Symptoms
- C. Responsibilities for Responding to A Data Breach
 - 1. A Team of One?
- D. What To Do Next
- E. Collect Information About the Data Breach
- F. Look at the Big Picture
- G. Notifications
 - 1. Notification Procedures
 - 2. Don't Delay Notification
 - 3. Data Breach Notification Letter Template
- H. Internet Field Trip: Security Breach Notification Laws
- I. Data Breach Checklist
- J. Can Lessons Be Learned?
- K. What Happens to Stolen Data – The Dark Web
 - 1. Identify Theft and Synthetic Identities

Chapter 12: Online Safety for You and Your Home

- A. Five Steps for Data Security at Home
- B. Talk to Kids About Online Safety
- C. Creating Secure Passwords
- D. Email Security
- E. Mobile Phone Security
- F. Social Media Safety
 - 1. Email Scams
 - 2. Mobile Phone Scams
 - 3. Geotagging – A Hidden Risk?
- G. Data Privacy Issues for Children
 - 1. Children’s Online Privacy Protection Act
 - 2. Interactive Toys
 - 3. Baby Monitors
- H. Internet of Things (IoT) – New Security Challenges?

Resources

- A.** Risky Business
- B.** Federal Privacy Legislation
- C.** Document Retention Guidelines for Associations and MLSs
- D.** Wire Transfer Advisory
- E.** Model Written Data Security Plan (WISP)