

Creating "The Short Sale Specialist Desk & Field Guide Book" and PowerPoint Show

The Situation:

The real estate industry was imploding and banks and real estate professionals were reeling. My client Mike Kaminski of Funders' Choice was a real estate attorney and broker convinced that short selling underwater houses was one of the fastest ways to get home prices back in line with reality and inventory back on the market.

- It was a fact that many Washington real estate agents faced the end of their careers if they couldn't figure out a way to profit from the landslide of foreclosures and short sales.
- It was a fact that there was little or no money to be made on either transaction.
- The only way to keep these agents from going under was to make the short sales process doable in a large enough number to make a profit.

Kaminski developed an 8-hour Washington State-certified course focused on training Washington state real estate agents how to navigate short sale paperwork and work-out protocols to give these challenging transactions a better chance of closing. He had the course, now he needed an up-to-date guidebook and PowerPoint to teach it.

The Solution:

This client hired me to update his existing 97-slide PowerPoint presentation and develop a guide book from scratch -- to teach his system to as many agents as he could reach.

PowerPoint Presentation: First, I needed to become familiar with the course content, then identify where slides needed to be created to better correlate with the lecture content. I created 22 slides - many with graphics and flow charts - created a style sheet and formatted the entire presentation for a consistent look and feel.

Short Sale Field Guide: We started with a handful of forms, current laws, application documents and a shopping list of what else the client wanted to include in the field guide he provide to his students. With laws and bank rules changing every week, it was daunting to keep the manual up-to-date and it underwent three revisions in just four months.

- Initially compiled and organized about 50 documents; (multiply by three by completion.)
- Located missing or more current documents from government agencies, mortgage lenders and brokers, and from professional real estate organizations. These included swiftly changing Federal and State laws, lending forms and mortgage applications.
- Reformatted some documents and rebuilt some forms in MSWORD.
- Converted other documents into jpgs from various source applications
- Designed manual layout, Table of Contents and styles in MSWORD.
- Imported converted documents, edited and formatted the manual.
- Designed cover and published manual in PDF format.

The Result: Deliverable was a formatted 172-page Desktop Guide available to graduates of the CSSS course and 119-slide PowerPoint presentation for an 8-hour Washington State-certified - certified real estate course on "Navigating and Closing Residential Short Sales."