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NAR Course Planning Checklist

Administrative Tasks

When	Task	Expanded Notes
When Approved	Enter class on website calendar	Ensure accurate details: date, time, instructor, CE credits, registration link.
After Posting Online	Notify CRD of relevant courses	Include course link, instructor name, date/time, CE availability.
After Posting Online	Notify REBI of relevant courses	Same as CRD—use a pre-drafted template.
After Posting Online	Create PDF and JPG/PNG marketing assets	Include course details, instructor bio, testimonials, and export in multiple formats for social/email.

Advertising Tasks

When	Task	Expanded Notes
After Posting Online	Email Brokers marketing materials	Include attachments or Dropbox link and forwardable agent-facing copy.
30 Days Before	Email blast to agents	Write a compelling subject line and preview course benefits.
30 Days Before	Email instructor reminder	Confirm logistics, tech needs, and collect intro video.
25 Days Before	Email agents with instructor video	Embed thumbnail and strong CTA for registration.
21 Days Before	Post in FB group & run FB ad	Target real estate licensees nearby. Use a carousel or video testimonial.
14 Days Before	Email agents with testimonials	Use outcomes-based testimonials. Keep it short and visual.

Pre-Class Processing

When	Task	Expanded Notes
7 Days Before	Send roster to instructor	Include a sample welcome message for them to customize.
3 Days Before	Create books and materials	Include CE forms, printed slides, evaluation sheets. Prepare 10% overage.
1 Day Before	Send Pre-Class email to students	Include all logistics: time, location/link, parking, what to bring.
1 Day Before	Set up room or coordinate with office	Check AV setup, Wi-Fi, signage, and refreshment setup.
1 Day Before	Print tent cards	Large fonts, sorted alphabetically, backup blank cards ready.

Day of Class

When	Task	Expanded Notes
1 Hour Before	Open office & register attendees	Have sign-in sheets, badge stickers, and coffee ready. Test AV again.

Post Class

When	Task	Expanded Notes
Day After	Collect all class paperwork	Check for completeness: signatures, rosters, CE forms, tests.
Day After	Submit NAR roster to CRD/REBI	Follow template, confirm student info is complete.
Day After	Send feedback forms to instructor	Highlight positive quotes and trends in the feedback.
Day After	Submit CE forms to licensing Commission	Keep receipt confirmations for compliance tracking.
Day After	Scan/upload all docs to cloud storage	Organize folder by year > program > course name.

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Best Practice Recommendations

- **Build a shared folder structure**: Use a naming convention (e.g., 2025-06_SRS_Fredericksburg) to keep everything organized.
- **Use a checklist template in Trello, Asana, or Excel**: Include due dates, responsible party, and status columns.
- **Automate** where possible: Use email scheduling and templates for reminders and marketing.
- **Instructor briefing call**: 15-minute call 1 week out can prevent 2 hours of day-of chaos.
- **Debrief meeting post-event**: Capture wins, issues, and lessons learned for smoother execution next time.