The Perfect
Real Estate Assistant

Session 3

Assistant Session

Communication-Part 2

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Session 3-Assistant Session: Communication (2)

Objectives for Today's Session

1. How to hold effective meetings
2. Tips for Daily/Weekly written and verbal communication
3. Keep your Team updated
4. What KW Command can do to help

Guidelines for this course:

1. Join MAPS on Facebook to stay up to date on all MAPS events and programs:
2. Only paid participants may listen and contribute.
3. To ask a question or make a comment, you may type your questions into the "Chat" Box.
4. If you would like to speak on the call, please wait until the end of the session to raise your hand. The coach will let you know when they are ready for comments.
5. Complete all assignments prior to call.
6. Be PREPARED!

Agenda for Today's Session

Get Ready!

Complete the questions on this page as a warm-up to prepare for your coaching session.

What is your biggest challenge in communicating with your agent?

____

____

What is your biggest challenge in communicating with your clients?

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What systems do you have in place for written communication?

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What systems do you have in place for verbal communication?

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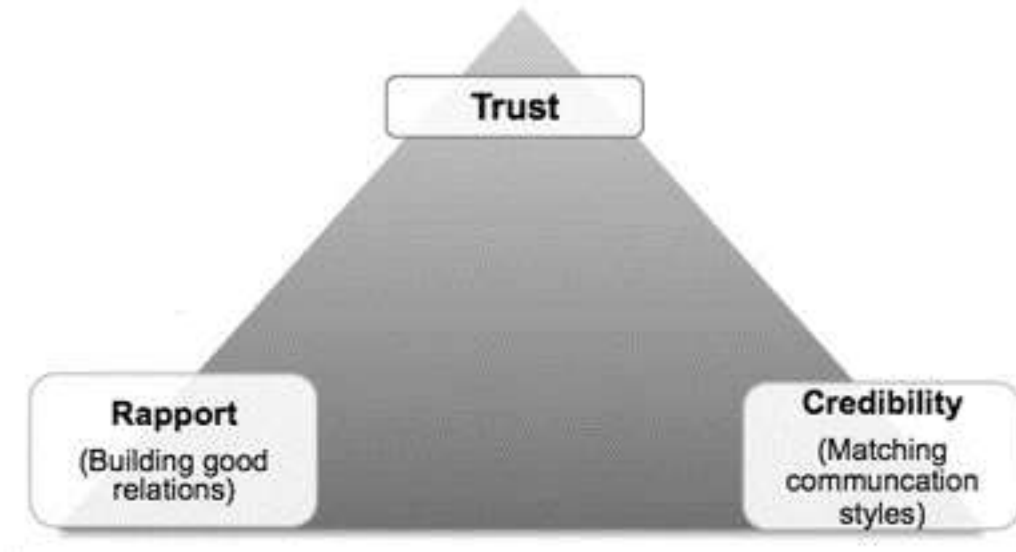
Seven Steps to Building Rapport (and being charming)



People are more receptive to people like themselves.

1. KNOW YOUR AUDIENCE

If you are familiar with the DISC... then you should speak their "tribal language."

For Example:

a. **D**-driver...demanding, in a hurry, appears rude, quick decisions, wants only the facts

b. **I**-expressive ... speaks in adjectives, excited, emotional

c. **S**-amiable... does not like confrontation, wants things even keel, does not like change

d. **C**-analytical. ... cautious, won't make decisions unless they have all the facts, figures and stats

2. BODY LANGUAGE

a. Wait 10 seconds then match body language

b. Use the same hand gestures when it's your turn to speak

c. Mimic their facial expression … if they raise their eyebrows...you do the same when responding

d. Head nods ... very powerful when you want to build rapport. If they are head nodding ...match immediately.

3. MIMIC TONALITY

a. Never mock or make fun of accents

b. Speak loud or soft based on their tonality

c. Three ways people speak...1. Throat … "froggy" type of voice 2. Nose ... can sound congested 3. Chest ... somewhat deep and loud.

4. BREATHE LIKE THEY BREATHE

a. Watch their breathing

b. If it increases ... slow down ... they are getting excited...could be good or could be not good

c. If they sigh ... you sigh with your response

5. MATCH RATE OF SPEED

a. If they speak quickly ... pick up your pace and match

b. If they are slow in their speech...slow down

c. If you speak fast when they speak slow … you will appear as a "slick salesperson" trying to slide something by them

d. If you speak slowly when they speak fast … you will appear as a “slow thinker…or unable or unwilling to understand them".

6. REPEAT AND APPROVE

a. Shows you are listening

b. Instantly bridges gap to rapport ... you are on the same page

c. Learn to repeat and approve with head nods

7. ASSUME YOU HAVE RAPPORT

a. Assume you have rapport and speak as if you are close friends who you trust and they trust you.

b. Be confident in your conversation.

WHY ARE TEAM MEETINGS IMPORTANT?

1. They build supportive relationships.... the team can hear of individual contributions and challenges.

2. It's a safe environment.... much better results because it's verbal and not an email.

3. Truly a level playing field for all team members and an open way to communicate to everyone at the same time.

4. Critical role in leadership...bring the team together and set the pace for the week and goals.

5. Times of celebration, great way to acknowledge greatness.

6. Times of crisis...rally the team together.

7. Space for giving feedback to each other.

8. Teaching opportunity.

9. Learning opportunity.

10. Creates growing to the next level.

WEEKLY MEETING

1. Everyone on the team must be going in the same _____________________.
2. Everyone on the team must communicate effectively _____________________ in their department.
3. Everyone on the team must attend—it is_____________________.
4. It is important to start ______ _______ and end _____ _______.
5. Make it fun—start with a _______ or fun ________.
6. Work on things together, like reading a book, to improve _______________.
7. TEAM stands for T_________ E__________ A__________ M__________.

At the Monica Reynolds Team we believe in 1 weekly meeting with the entire team. Our meeting is held on Tuesdays at 10:00AM. They are approximately 30 minutes, never to exceed 45 minutes. The goal is to share the wins and challenges. Each department reports and gives a brief update. Here is a sample of the agenda we follow:

Weekly Agenda

1. Who has a WIN to share?
2. Housekeeping updates
3. Announcements
4. Report from Listing Manager
5. Report from Sales Manager
6. Report from Escrow/Closing Manger
7. Tip of the Week (client conversations (scripts), personality style, referral reminders, etc.)

TIPS FOR HOLDING AN EFFECTIVE MEETING

1. Same time each week.

2. No more than 30 minutes.

3. No cell phones/ no laptops.

4. Everyone brings a notebook and a pen.

5. If you are late...you do not come into the meeting.

6. This is not a complaint session.

7. Attendance is mandatory.... suggested strongly if you are an independent contractor.

8. No excuses for not coming.

9. Make it valuable each time, teach and train.

10. Have an agenda that is predictable each time…shows you are prepared and organized. You don't wing this!

Please note… there is also a daily huddle for admin and agents

WHAT TO DO WHEN SOMEONE IS NOT ATTENDING

1. Meet with them coming from curiosity...watch your tone.

2. Review the benefits of attending.

3. You cannot lower your standard for one...even if they are the superstar of the team.

4. Request they not miss again and set your standard....2 strikes, and you are out. (Obviously, illness, etc. will always be excused)

MONTHLY MEETING FORM - NUMBERS

	Goal	Actual
1. Listing Appointments		
2. Listings taken		
3. Pendings Buyer		
4. Pendings Seller		
5. Closed Number		
6. FSBOs contacted		
7. FSBOs listed		
8. Expireds contacted		
9. Expireds listed		
10. Buyer/Brkr agree-ment signed		
11. Past clients contacted		
12. # of reviews		
13. # of referrals		
14. # of completes added to database		

Agent/Assistant Quarterly/Year-End Mastermind Meeting

1. If you were CEO of my company, what would you do differently? Why? How would you implement those ideas?

2. Give me 1 idea on a way you think I can improve the Consumer Experience.

3. Give me 1 way to decrease expenses.

4. Give me 1 way that, as a team, we can be more effective.

5. What is one challenge/problem that you would like to mastermind with the group to help resolve?

6. What have you done recently to WOW a customer?

7. What can you do, as a great assistant, to bring 1 referral per month to the Team?

What is "The Friday Report"?

1. The Friday report is a highly effective way to have ________________of the accomplishments of the week.

2. It reminds the agent the ____________ and the ____________of the assistant.

3. It is a great reminder of the business __________forward or __________.

Sample Email to Admin from Agent asking for the Friday Report

Good Morning!

Please send me a report each Friday on:

-5 Things you accomplished to move the business forward.

-Please indicate Week High and Week Low.

-What did you do to "wow" a customer this week?

Thank you for your contribution to our team.

Sample of an Actual Friday Report Received from TC

FRIDAY REPORT

Name: **Date**: ______________

Week High: receiving 'thank you' gifts from 2 separate clients who closed escrow last week.

Week Low: having to move one closing to next week.

5 accomplishments:
1-3 new closings
2-3 new buyer referrals placed
3-Successfully negotiated 2 repair requests
4-One escrow closing 1 week early
5-Sent thank you note to seller

What did you do to Wow a Customer?

negotiated $200 off the quote on the repairs. Sellers love me!

ADMINISTRATIVE ASSISTANT'S FRIDAY REPORT

Week of: ___________________

5 things I accomplished to move the business forward…

1). ____

2). ____

3). ____

4). ____

5). ____

Week High _______________________________________

Week Low ____

What did you do to WOW a customer?

____

____

Here are some suggestions for additional items you can add to your Friday Report:

What did I do to decrease expenses? _______________________________

What did I do to keep my agent on track? ____________________________

How did I help our team reach its goals? _____________________________

\# of Reviews ___________ # of Referrals __________

TIPS:

***Assistant creates the template above to use electronically. Keep it handy so you can add to it throughout the week.**

***Email it to your agent each Friday**

Daily Ways to Help You and Your Agent Stay in Touch

Scheduled Daily Huddle

- Stand-up meeting (in person, call or virtual)
- Any challenges or special situations
- Admin staff

Daily "Check-ins"

- 11:00 & 4:00 M-F (in person, call or virtual)
- Quick summary of the day
- Assistant and Lead Agent

Daily Meeting Form

- What I did yesterday
- What I am doing today
- Problems/Concerns to discuss with my agent

Daily Meeting Form/Tasks

Date: ____________________

Today's to do list

1. ________________________
2. ________________________
3. ________________________
4. ________________________
5. ________________________
6. ________________________
7. ________________________
8. ________________________
9. ________________________
10. ________________________
11. ________________________
12. ________________________
13. ________________________
14. ________________________
15. ________________________

Follow-up from yesterday

1. ________________________
2. ________________________
3. ________________________
4. ________________________
5. ________________________
6. ________________________
7. ________________________
8. ________________________

Ongoing

1. ________________________
2. ________________________
3. ________________________
4. ________________________
5. ________________________
6. ________________________
7. ________________________
8. ________________________

Problems/Questions to ask in the Huddle

____

____

____

Daily Meeting Form/Tasks (sample)

Date: ____________

Today's to-do list

1. Process new listing on Cobalt St.
2. Call Kennedy Termite/Iris Ave.
3. Call 12 sellers/weekly update
4. Check in with Agent at 11:00
5. Call buyers on Saxony Road
6. ________________________
7. ________________________
8. ________________________
9. ________________________
10. ________________________
11. ________________________
12. ________________________
13. ________________________
14. ________________________
15. ________________________

Follow-up from yesterday

1. Complete Cobalt St. listing
2. Termite report/Iris
3. Buyers okay/update
4. ________________________
5. ________________________
6. ________________________
7. ________________________
8. ________________________

Ongoing

1. Repairs on Oak Street
2. Enter 3 new contacts in database
3. Termite work for Rheade St. Condos
4. Probate on Denver Ave.
5. Ask for reviews
6. ________________________
7. ________________________
8. ________________________

Problems/Questions for Huddle Meeting

____

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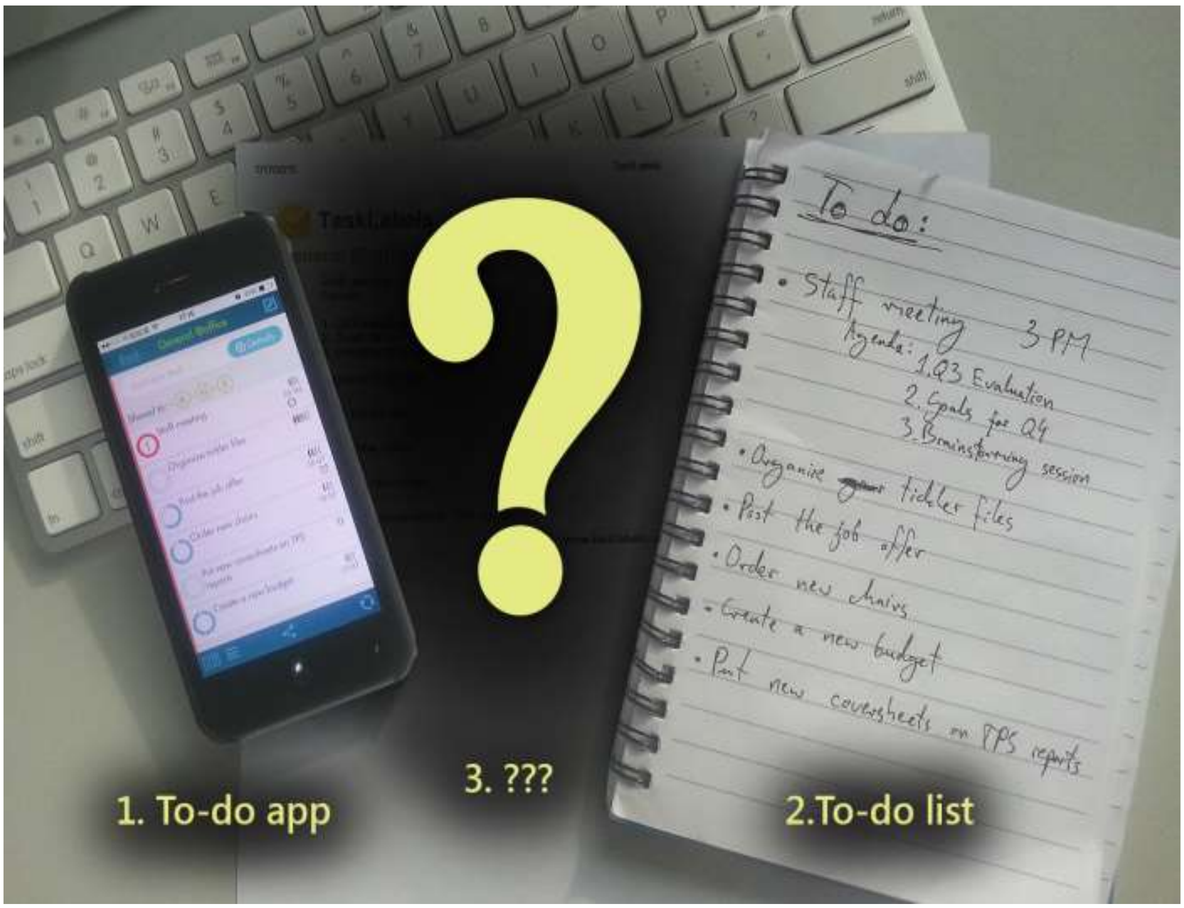
STAY ORGANIZED

Even the strongest team can get into trouble if they don't organize their time and tasks properly. Today, we have a lot of software solutions for our team's task management. Whatever you choose should be what suits you and your team the best.

If you would rather keep track of your tasks using an app, there are lots to choose from. Here are just a few of the most popular… We recommend KW Command but there are others such as Microsoft To Do, Google Keep, Todoist, Any.do and Habitica.



Whether you choose to track your tasks and accomplishments by paper or electronically, it is a great help to have it right in front of you to review often.

LISTING UPDATE REPORTS

It's important to keep your agent and team up to date. You can use Command, whiteboards, paper reports such as Google Sheets or Excel or a monitor/screen to project the information.

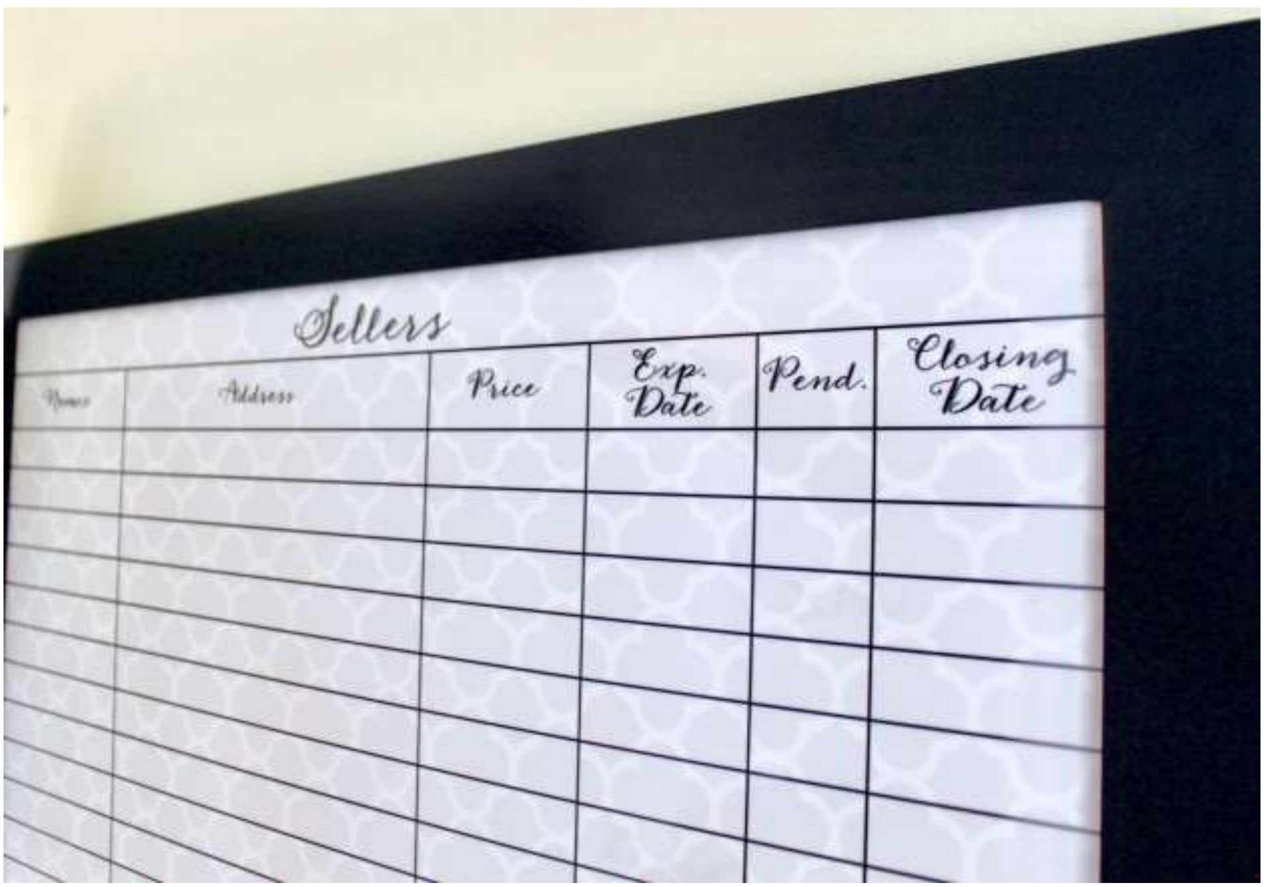
Command

Listing Update using Excel spreadsheet

Address	Zip	Seller	Phone #	Current Price	List Date	Exp. Date	Original Price	DOM	COMMENTS
Last Update 0/00/00									
2467 Elevado Rd	92084			$899,900-$989,900			$899,900-$989,900	5	Vacant *Canadian owners
6698 Halite Pl.	92009			$1,149,000-$1,199,00			1,250,000	28	Check after each showing, Wear booties, 78^
4972 Tierra Baja Way	92115			$550,000			$565,000	17	Vacant
1737 Beryl St.	92109			$989,900-$1,039,900			$989,900-$1,039,900	0	Vacant
1465 Heritage Ln	92024			$1,275,000			$1,275,000	0	Owner Occupied
3069 Bonita Woods Dr.	91902			$799,900-$849,900			$849,900-$899,900	36	Owner Occupied
2954 Anaheim St.	92025			$749,900			$749,900	9	Owner Occupied *Hero Program*
110 Paseo Marguerita	92084			$389,900			$389,900	0	Owner Occupied
1241 Santa cora Ave #327	91913			$269,900			$269,900	1	Owner Occupied
6213 Paseo Privado	92009			$949,900			$975,000-$1,049,900	17	Owner occupied (Gate code: 8569)
1579 Norran Ave	92019			$399,900			$449,900	50	owner (wife) occupied *Divorce*
3361 Avenida Soria	92009			$873,883			$873,883	0	Vacant, New Build
441 Bougher Rd	92069			$569,900			$569,900	43	Vacant *Police Patroled*
3352 Del Rio Court	92009			$638,000			$649,900	16	Owner Occupied

Digital Screen

Listing Whiteboard



Pending Update Reports

The same holds true for your pendings/closings. It's just as important to keep your agent and team up to date on closings. You can use whiteboards, paper reports such as Google Sheets or Excel or a monitor or tv screen to project the information

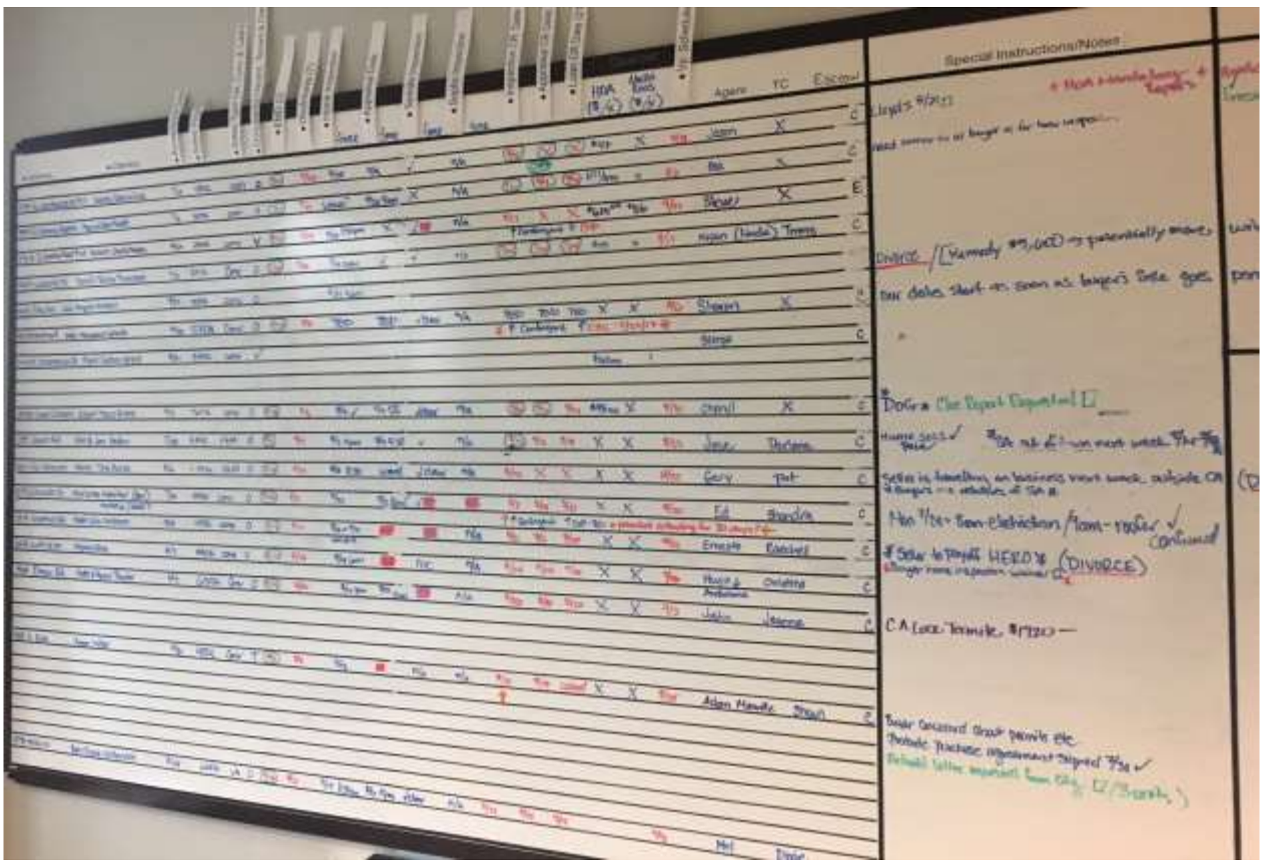
COMMAND

Excel Spreadsheet

SELLER	PROPERTY ADDRESS	CLOSING DATE	PHONE	ALT. #	PRICE	VOLUME
BUYER	PROPERTY ADDRESS	CLOSING DATE			PRICE	

Digital Screen

Whiteboard in Closing Office



ASKING FOR CUSTOMER REVIEWS ON SOCIAL MEDIA WEBSITES

CLIENT CONVERSATION:
Good Morning! Thank you for working with our team and for recognizing our teamwork. It is our privilege to work with you. As you may know, our business is built on referrals from great clients like yourself and reviews are an important part of our business. May I ask you to take a few moments to give us a review on ____________?
I would like to send you an email with a link to the website that you can just click and review. Thank you very much.

Additional option:
For your time, _______________ (agent) would like to send you a Starbucks card for a couple of cups of coffee. Thank you and I am sending you the link now.

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Thank you very much.

CLIENT CONVERSATION (after a compliment):

"Thank you so much for saying that! May I ask you a favor ... our business is based on great reviews from clients like you; may I send you a link to Google and/or Yelp, etc ... and would you be so kind as to give us a great review today?"

"Thank you for doing that. We would love to send you a Starbucks card for a couple cups of coffee for taking the time."

Tip: It does not matter where in the listing or pending process you are…ask for the referral…timing is everything.

KW COMMAND

What will you do within Command?

The short answer is "everything." The list of experiences within the product is ever-growing and improving!

Goals (aka the CGI!) – A key piece of your dashboard is your goals and the progress you and your team have made toward them.

Calendar – A seamless integration with both Office 365 and Google Calendar, our master calendar will help you schedule appointments, training, and protect your valuable time block for lead generation.

Contacts – The access point to your database and the location where you add and update contacts and track your touches. But don't worry, you're not going to be tied to a desktop. Use Kelle to access and manage your database … anytime, anywhere.

Designs – Your design center for digital graphics, print materials, landing pages, HTML emails, and more. Create your own, import existing assets, or leverage the library to release the customized marketing campaigns of your dreams.

Listing Consult – Keller Williams is putting its massive treasure trove of data to work, building the listing experience of the future. Agents will use hyperlocal data to show clients unique insights about their specific home in relation to their market. With you expertly guiding them through the experience, they'll be able to make decisions based on both qualitative and quantitative attributes.

Opportunities – The most efficient way to track your client opportunities all the way from lead to close. Manage your offers, documents, and communications with your client and broker – all in one convenient location. The goal is to allow you to focus on dollar-productive activities. Kelle and Command will do the manual work for you; they'll remove the need for manual data entry and simply ask you to validate information as a deal moves forward.

Campaigns (code name "Lead Accelerator") – Leveraging key communication channels, you will be able to create effective and engaging lead generation campaigns with just a few clicks. An intelligent, cross-channel marketing tool, this experience is designed to simplify and optimize ad creation and maximize the value of every dollar spent.

Referrals – You may think you know the Referrals system, but you haven't seen anything yet! Referrals went to General Availability on KWConnect at Family Reunion (February 2018). Since then, over 43,000 agents have used Referrals to close over $5 billion in volume. In the future, agent-to-agent referrals will be integrated into and managed from Command.

Leverage – Whether you're a single agent making your first hire or a large expansion business building a team of talented associates, this leverage tool will help quickly create, syndicate, and manage jobs ads, then efficiently track candidates in your pipeline through the entire Career Visioning process.

SmartPlans – While Kelle helps you access the entire platform, SmartPlans are what will make you even more efficient by automating your tasks. A workflow management tool, it helps agents with checklists, drip campaigns, marketing, recruiting, and more. Pre-built plans within the SmartPlan library will help you get up and running quickly, or you can choose to create custom plans. SmartPlans can be simple, like a "happy birthday" emailer or a traditional campaign. Plans can also be more sophisticated, like a "market listing" plan that incorporates social, direct mail, and email marketing.

Policy and Procedures Tab Suggestions
1. 2. 3.

What I Learned Today …

____

____

____

Session 3: Homework Assignment - Complete and Give to Your Agent

1. ____

2. ____

3. ____