The Perfect Real Estate Assistant

Session 4

Agent Session

Job Description/Schedule

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Session 4 - Agent Session: Job Description and Schedule

Objectives for Today's Session

1. Review what you should expect from your assistant on a daily basis.
2. Discover why job descriptions are important for your team.
3. Review sample job descriptions.
4. Have a schedule—why and how.
5. Review sample schedules and templates.
6. What your assistant will learn this month.

Guidelines for this course:

1. Join MAPS on Facebook to stay up to date on all MAPS events and programs: https://www.facebook.com/mapscoaching
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. The coaches 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!

Think about you and your team's leadership and standards as you read the statements on this page as a warm-up to prepare for your coaching call.

Leadership and Standards: What is it?

1. It is who you are as an agent and as a business owner.
2. It is the standards you and your team hold for yourselves.
3. It is the level of service your clients expect from you and your team

The Importance of Standards

1. It sets the expectations for who you are.
2. Standards provide your team with consistent protocols of conduct.
3. Standards provide your team with consistent protocols for achievement.
4. Standards provide consistency.
5. Standards provide congruence with the culture.

Team Standards:

- Everyone has a schedule.
- Everyone has a job description.
- Everyone is licensed.
- Everyone did a KPA.
- Everyone has weekly, monthly, yearly goals.
- Everyone gets a 90-day review.
- Everyone attends the Tuesday Team Meeting.
- Administrative staff have a huddle once a day for 15 minutes.
- Sales Team meets 15 minutes daily for Purposeful Conversations and goals.

WEEKLY MEETING

1. Everyone on the team must be going in the same direction.
2. Everyone on the team must communicate effectively within their department.
3. Everyone on the team must attend—it is "mandatory" (strongly encouraged).
4. It is important to start on time and end on time.
5. Make it fun—start with a joke or fun story.
6. Work on things together, like reading a book, to improve comradery.
7. TEAM stands for Together Each Achieves More.

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 (script, 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 computers.

4. Everyone brings a notebook and a pen.

5. If you are late...you don't 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. Confront coming from curiosity...watch your tone.

2. Review the benefits of attending.

3. You can't 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)

AGENDA FOR YOUR MONTHLY MEETING

1. Start with a warm welcome and a joke or fun story. You can always designate this to a different person each time. Lighten up the energy in the room.

2. Review the numbers and where we are using the monthly meeting form. ...talk up what needs to be done and get the team's acceptance.

3. 10-minute informational talk from a vendor

4. Acknowledge the "extraordinary" accomplishment of a team member.

5. 3-5-minute report from TC....anything back on market etc.

6. 3-5-minute report from Listing Manager.

7. 3-5-minute report from Sales Manager.

8. Teach something, come from the heart of a teacher.

9. Book Report...one chapter at a time...have a designated team member go over that chapter with highlights and take-aways.

10. End the meeting with the goals for the week. Encourage, encourage, encourage.

Tip: For the monthly meeting invite one of your vendors to come speak and bring breakfast!

MONTHLY MEETING FORM

	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/Broker agreement signed		
11. Past clients contacted		
12. # of reviews		
13. # of referrals		
14. # added to database		

Friday Report

1. The Friday report is a very effective way to have **a list** of the accomplishments of the week.

2. It reminds the agent the **job** and the **accomplishments** of the assistant.

3. It is a great reminder of the business **moving** forward or **not**.

Sample Email to send to Staff Requesting the Friday Report

Good Morning!

Please send me a report on Friday with 5 things you accomplished to move the business forward.

Please indicate Week High and Week Low.

How did you WOW a customer?

Thank you for your contribution to our team."

Sample of an Actual Friday Report

FRIDAY REPORT

Name: Kathi Date: 10/12/20xx

5 Accomplishments:

1). 3 new escrows
2). 3 new buyer referrals placed
3). Successfully negotiated 2 repair requests
4). One SS escrow closing 1 week early
5). Sent thank you note to seller

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.

What I did to wow a customer – negotiated a better deal on their repair request

ADMINISTRATIVE ASSISTANT'S FRIDAY REPORT

5 Things I Accomplished to Move the Business Forward…

Week of:

1).

2).

3).

4).

5).

Week High…

Week Low…

What did you do to WOW a customer?

Weekly Communication Reports

1. Friday Report (by email)
2. Escrow/Under Contract Update (paper and/or electronic)
3. Listing Update (paper and/or electronic)
4. Buyer Report (paper and/or electronic)
5. Closing Report/Source Report (paper and/or electronic)

Reasonable Expectations for Your Assistant

1. Manage all **paperwork and files.**
2. Handle all **incoming calls.**
3. Keep agent **on track.**
4. Have a **job description and post it.**
5. Be a **team member.**
6. Have excellent **communication skills.**
7. Be **professional** and **courteous.**
8. Be a **"can-do"** person.

Have a Schedule: Why and How

1. Fundamental basis of time management
2. A schedule is a road map to complete tasks
3. Information on what you are going to do that day
4. Keeps you on track
5. Helps you get back on track
6. To create a schedule, list everything you do
7. Once you have your list, sort by common duties
8. Estimate time for each activity… don't underestimate, you should overestimate
9. A schedule is strong accountability for what you are to achieve each day
10. Job satisfaction
11. Be realistic
12. Be flexible … things will come up that will require you to deviate
13. Evaluate your schedule monthly and quarterly to make sure it is realistic and includes all the important tasks
14. If it is not in the schedule, it is not important
15. Schedule all the top priorities for the morning

Real Estate Executive Assistant Schedule Sample

	Monday	Tuesday	Wednesday	Thursday	Friday
8:00 AM	Check & return voicemails, emails, & text messages in order of priority	Check & return voicemails, emails, & text messages in order of priority	Check & return voicemails, emails, & text messages in order of priority	Check & return voicemails, emails, & text messages in order of priority	Check & return voicemails, emails, & text messages in order of priority
9:15 AM	Escrow follow up/ Top priorities/ Process listings/Call clients	Escrow follow up/ Top priorities/ Process listings/Call clients	Escrow follow up/ Top priorities/ Process listings/Call clients	Escrow follow up/ Top priorities/ Process listings/Call clients	Escrow Follow up/ Top priorities/ Process listings/Call clients
9:30 AM					
10:00 AM		Team meeting			Complete Reports: Friday, Pending, & Listing
10:30 AM					
11:00 AM	Meet with Agent/ Huddle	Meet with Agent/ Huddle	Meet with Agent/ Huddle	Meet with Agent/ Huddle	Meet with Agent/ Huddle
11:15 AM	Return voicemails & emails/Finish top priorities	Return voicemails & emails/Finish top priorities	Return voicemails & emails/Finish top priorities	Return voicemails & emails/Finish top priorities	Return voicemails & emails/Finish top priorities
11:30 AM					
11:45 AM					
12:00 PM	Lunch	Lunch	Lunch	Lunch	Lunch
12:30 PM					
1:00 PM	Return voicemails & emails	Return voicemails & emails	Return voicemails & emails	Return voicemails & emails	Return voicemails & emails
1:30 PM	Transaction management/ Listings	Transaction management/ Listings	Reviews & referrals	Transaction management/ Listings	Update leads & numbers
2:00 PM					Customer service calls/Agent update
2:30 PM	Return voicemails/ Remaining calls	Return voicemails/ Remaining calls	Return voicemails/ Remaining calls	Return voicemails/ Remaining calls	Return voicemails/ Remaining calls
3:00 PM	Work on database projects/Mailings/ P & P Manual	Work on database projects/Mailings/ P & P Manual	Work on database projects/Mailings/ P & P Manual	Work on database projects/Mailings/ P & P Manual	Work on database projects/Mailings/ P & P Manual
3:30 PM					
4:00 PM	Wrap up/Return voicemails & emails	Wrap up/Return voicemails & emails	Wrap up/Return voicemails & emails	Wrap up/Return voicemails & emails	Wrap up/Return voicemails & emails
4:30 PM	Prepare workspace for next day	Prepare workspace for next day	Prepare workspace for next day	Prepare workspace for next day	Prepare workspace for next day
5:00 PM					

The Importance of a Job Description

A. Roadmap to Success
B. Clarity of Expectations
C. Duplicatable and Scalable
D. Training Checklist

What is your job description as a great agent?

A. $ Lead Generation
B. $ Listing Appointments
C. $ Lead Follow-up
D. $ Writing Contracts
E. $ Role Play/Purposeful Conversations Practice

Does each of your staff have a job description?

____

____

How often is it updated?

____

____

How often do you review it?

____

____

What Is Wrong with this Job Description?

Scope of Responsibility:

Responsible for all aspects of Closings from point of sale through closing, including updating and maintaining the integrity of history information on Top Producer for all clients, both Sellers and Buyers. In general, responsible for running the office in areas such as maintaining supplies/printed materials, computer maintenance, updating and troubleshooting, key contact for updates, changes and questions regarding external office procedures as specified by Office Manager and the Corporate office, and assist in payroll records and various other duties. Maintain positive relations with all outside entities to insure a smooth and prompt closing, including but not limited to Title Companies, Mortgage Companies, Relocation Companies, other Real Estate Agents, Home Inspection Companies, Home Warranty Companies, Contractors/Vendors, and other office personnel. Responsible for external programs for maintaining client contact on all past clients. Assist with Farming Database and Past Client Mailings. Support all agents as needed and keep them accountable and on track for production goals. Continually brainstorm with the agents on possible ideas to increase business and implement them. ASK FOR REFERRALS!! Backup for Listing Support Services.

Must be knowledgeable of the following computer programs:

- Windows
- Word/Excel
- CRM
- Publisher
- Network Management
- MLS Systems
- Internet

Skills necessary/knowledge of:

- Excellent time management skills
- Detail oriented
- Good communication skills
- Beneficial to have an understanding of real estate guidelines
- Be a team player
- Familiarity of real estate contract and various related forms

Job Description Sample 1: ASSISTANT

Overview: Responsible for performing a variety of administrative and support duties to help the agent keep on track to increase business, improve profitability, and develop life-long clients.

Daily Musts:

- Receive agent's daily schedule
- Handle all incoming phone calls
- Handle all incoming emails
- Handle all incoming agent emails
- Fill out Daily Meeting form at the end of the day
- Communicate with agent
- Go through each active file folder

Duties:

- Handle all incoming phone calls
- Return all phone calls in a timely manner
- Handle all incoming emails
- Prepare all packages Pre-list, Listing and File folders
- Maintain all files in a neat and orderly fashion
- Send out any pre-list/Specialty packages
- Monitor and follow up on all sales/escrows/closing files with _________
- Maintain business supply inventory
- Monitor website
- Handle all checking accounts, deposits and reconciliations
- Enter information in Quick books
- Keep track of mileage
- Send out Farm mailings quarterly
- Send out Holiday Cards (Thanksgiving, Christmas)
- Send follow up letters to all clients
- Post new listings on office board

- Monitor weekly, monthly and yearly goals
- Update and maintain all clients' records in the database
- Responsible for all data entry and reports
- Manage all incoming and outgoing correspondence
- Ask personal people farm for referrals for the agent
- Maintain and improve Office Policy and Procedure Manual
- Misc Tasks: office products, bank, post office, signs (if needed)

Pre- Listings

- Deliver or send Pre-Listing Package
- Call seller to confirm date / time of appointment
- Prepare a New Client File
- Work with ___ on examples of:
    - Property brochure
    - Just sold post cards
- Prepare CMA's
- Order property profiles from Title Company
- Obtain property tax assessor information sheet
- Prepare the listing folder
- Fill out and input MLS Input sheet
- Order 200 Just Listed names of neighbors if applicable from the title company
- Prepare map and directions to property

Listings

- Prepare a New Client File
- Enter all client information in database
- Monitor and follow up on all listings
- Maintain Communication Log
- Make appointment to take pictures and virtual tour
- Submit proper information and photos to MLS
- Post photos and text to all websites

- Order “For Sale” sign
- Order “text” sign
- Order “Sold” rider
- Email MLS print out to seller
- Email new listing to top 25 agents
- Work with ___ on:
  - Property brochure
  - Just sold post cards
  - Order brochures
- Send “thank you” letter to seller
- Obtain keys, make extra keys
- Install lockbox with key
- Make sure sign is ready and placed
- Put up brochure box with Flyers
- Monitor that client has enough Flyers
- Send “Just Listed” letter
- Update white board
- Coordinate showings of property:
  - Maintain Showing Log
  - Ensure agent informed re: price improvements, upgrades, improvements, other selling features
  - Inform agent of any special showing instructions from the seller
  - Follow up with the agent to obtain buyer’s feedback
  - Call seller to provide feedback regarding showing
  - Include showing feedback in seller’s weekly marketing update
- Coordinate open houses of property:
  - Coordinate date/time with seller and buyer agents
  - Ensure buyer agent receives all info regarding selling features of the home
  - Follow up with agent after the open house to obtain feedback about traffic, comments
  - Call seller to provide feedback regarding open house
  - Include open house feedback in seller’s weekly marketing update
- Negotiate price improvements (licensed assistant only)

Upon Receipt of Offer - *(Licensed Assistant Only)*

- Present offer to client:
  - Negotiate on behalf of client's best interest
  - Ensure client understands contract including deadlines and costs
  - Obtain estimated settlement sheet from closing office
- Submit paperwork:
  - Send full contract to lender and title company immediately
  - Send accepted contract, client, lender and title company information to closing office
- Update white board and CRM database with transaction information and deadlines
- Coordinate inspection:
  - Prepare buyer/seller on what to expect from a thorough inspection
  - Request inspection (when representing buyer)
  - Coordinate schedule for inspection (when representing seller)
  - Review results of inspection with buyer/seller
  - Call other agent and negotiate for items to be repaired as applicable (when representing buyer)
  - Negotiate with other agent on any objections from inspection (when representing seller)
- Coordinate appraisal:
  - Ensure lender has ordered appraisal when inspection objections are finalized
  - Notify and brief all parties when appraisal complete
- Follow contract deadlines:
  - Ensure Seller's Disclosures are sent, reviewed, and signed by deadline
  - Ensure inspection items are handled and agreed to in writing by deadline
  - Follow up with lender on completion of appraisal by deadline
- Monitor loan completion:
  - Contact other agent or lender for frequent loan status updates
  - Update client on loan status and any possible changes in the settlement deadline and negotiate extensions when needed

- Ensure documents will be ready by settlement deadline

After Receipt of Offer:

- Put up “Sold” or “Pending” Sign
- Collect Property brochures
- Prepare Closing File

Preparing for Closing - *(Licensed Assistant Only)*

- Schedule closing with client
  - Ensure client has address/directions to the closing office
  - Inform client of proper identification and documentation to bring to closing
  - Notify other agent of scheduled closing time
  - Send estimated closing costs to client and ensure all information is accurate
- Prepare closing packet for client:
  - Provide copies of all documents from the transaction
  - Provide utility company information with phone numbers
- Call and inform client when transaction funds and records
- Coordinate transferring keys to new homeowner

After

- Report Sold to MLS
- Remove lockbox
- Remove Sold Sign
- Change website to Sold
- Send “Just Sold” cards
- Send gift and “thank you for working with our team” letter
- Send “thank you” letter to the other agent
- Create “other agent database”
- Send “thank you” letter to lender

- Put in Anniversary File
- Send Client Survey, follow up until received
- Convert File to Sold File
- Call Just Sold
- Remove from other websites
- Dated Jan 20, 20_ _ Closing Letter and Statement for Buyer
- Dated Jan 20, 20_ _ Closing Letter and Statement for Seller
- Update sold records in Pre-List Package
- Update database with forwarding address

Buyer Clients:

- Prepare a New Client File
- Enter all client information in database
- Pull up houses in MLS
- Prepare showing route if applicable
- Schedule showing appointments
- Make copies for clients/ Agent
- Make any follow-up calls
- Call clients and introduce procedures/what to expect
- Monitors and follow up on closing files with ___
- Maintain Communication Log
- Send "Congratulation" Letter to buyer
- Attend Closings
- Send gift and "thank you for working with our team" letter to buyer
- Send Client Survey, follow up until received

Must be Knowledgeable of the Following Programs:

- MS Office (Word, Excel, Outlook)
- MLS Systems
- QuickBooks
- Database
- Kelle
- KW Command

Necessary Skills and Attributes:

- Excellent time management skills
- Detail oriented
- Good communication skills
- Team player
- Treats all clients and team members with respect
- Positive attitude and friendly demeanor
- Highly organized

Date: ____

Employee: ____

Agent: ____

Job Description Sample 2

GOALS:

- To help the agent increase business
- To help the agent decrease expenses
- To assist the agent in developing clients for life
- To keep agent on track
- To monitor goals
- To handle administrative duties

DAILY MUSTS:

- Receive agent's daily schedule
- Handle all incoming phone calls regarding listings
- Handle all incoming emails regarding listings
- Fill out daily meeting form at the end of the day
- Communicate with agent
- Go through each active file folder

RESPONSIBILITIES:

- Returns all phone calls in a timely manner
- Handles all incoming emails
- Keeps all files neat and orderly
- Monitors and follows up on all sales/escrows/closing files
- Monitors website marketing
- Keep track of miles
- Follow-up letters/emails to clients
- Post new listings on office board
- Monitors weekly, monthly, and yearly goals.
- Update all clients' records in the computer
- Responsible for all data entry and reports
- Responsible for all correspondence
- Asks personal people farm for referrals for the agent
- Maintains and improves Office Policy and Procedure Manual

CONTRACT MANAGEMENT:

- **Listing Management**
  - Filing system
    - Create a file with each new listing and use the 6-section outline
    - Maintain communication log

- Showings
  - Schedule showing
    - Follow showing instructions for each property
    - Enter agent name, brokerage, phone number and showing date/time onto showing log
  - Ensure agent has all pertinent information on property
    - Update them on recent price reductions, offers and showings
    - Inform them of any upgrades, improvements, and other selling features
    - Inform them of any special showing instructions the seller has requested be followed
  - Be aware of other similar listings and give the agent the details of these properties
  - Ensure agent follows through on showing the property
  - Obtain constructive feedback that will be beneficial to seller
    - Follow up with agent who showed property
      - Buyer feedback
        - Ask detailed questions on what the buyer thought of the property.
        - Evaluate the buyer's feedback and point out features or selling points that may have been overlooked.
      - Agent feedback
        - Ask the agent what they thought of the price, location and any suggestions on selling the property
      - Enter feedback into My Red Tools
      - Enter detailed notes into the listing with the feedback
  - Communicate feedback to seller
    - Call or email the seller and inform them of the feedback obtained on their property
    - Include showing feedback in seller's weekly marketing update

UNDER CONTRACT MANAGEMENT:

- Present offer to client
  - Negotiate on behalf of client's best interests
  - Ensure client understands the full contract including deadlines and costs associated with it
  - Obtain estimated settlement sheet from escrow
- Submit paperwork to escrow
  - Send accepted contract, client, lender and title company information
  - Ensure full contract is sent to lender and title company immediately
- Update Under Contract Board and Top Producer with transaction information and deadlines
- Coordinate inspection

- Representing buyer
  - Explain the benefits of having a professional inspection performed
  - Prepare buyer on what to expect from a thorough inspection
  - Notify Transaction Coordinator to order inspection unless buyer declines
  - Review results of inspection with buyer
  - Call other agent and negotiate for items to be repaired as applicable
- Representing seller
  - Inform seller of when inspection is scheduled
  - Explain to seller how the outcome of the inspection can be
  - Follow up with buyer's agent on results of inspection
  - Negotiate on any objections from inspection

- Appraisal coordination
  - When inspection objections are finalized ensure lender has ordered the appraisal
  - Notify all parties when appraisal is complete and what the outcome was
- Follow contract deadlines
  - Ensure seller's disclosures are sent, reviewed and signed by deadline
  - Ensure inspection items are handled and agreed to in writing by deadline
  - Follow up with lender on completion of appraisal by deadline
- Loan completion
  - Contact other agent or lender for frequent updates on status of loan
  - Keep client updated on status of loan and any possible changes in the settlement deadline
  - Negotiate extensions when needed to ensure lender can complete the loan
  - Ensure docs will be ready by settlement deadline

CLOSING MANAGEMENT:

- Schedule closing
  - Schedule time convenient for client
  - Ensure client has the address/directions to title company
  - Inform client of proper identification/documentation to bring
  - Notify other Agent of scheduled closing time
- Send estimated HUDS to client before closing.
  - Review them with client and ensure all information is accurate
- Prepare closing packet for client
  - Include thank you letter
  - Full copy of the REPC with all addenda
  - Copies of all documents from the transaction
  - Copy of all utility company information with phone numbers

  - Funding and recording
    - Call and inform client when transaction funds and records
    - Ensure client is aware of when they can take possession
    - Coordinate transferring keys to new homeowner
  - Ensure sign is removed from yard.
  - Remove lockbox and flier holder from inside of home when representing seller
  - Send thank you letter to client after closing

CLIENT MANAGEMENT:

- **Tethering to Client**
  - Service the client … make their day
  - Establish a comfort level with client
  - Build client's confidence in order to handle negotiating their contract from beginning to end
- **Communicating with Client**
  - Telephone/email
    - Call and ensure the client is up to date with activities on the property each week
      - Showing feedback
      - Calls from sign and 800 sign-rider
      - Completed items from their marketing plan
    - Ensure client is satisfied with services that are being delivered
    - Ask client for referrals.
  - Mail
    - Send client a letter each week summarizing the week's activities
      - Print out of buyer acquire calls
      - Website activity including number of hits/calls
      - Showing feedback from client and agent
      - Open house activity including feedback from buyers
      - Lock box key activity showing report
      - Copy of advertisements
      - Completed items from the marketing plan
    - Send client a market update once a month

MARKETING:

- **Open Houses**
  - Find agents to hold open houses for listings
    - Send email to office staff to distribute to other agents throughout office
    - Call agents directly and ask to hold open houses
  - Coordinate time/expectations
    - Coordinate date/time with seller and agent
    - Ensure agent is aware of importance of arriving early, getting accurate information on traffic/feedback on home, and calling agent immediately after to relay activity
    - Ensure that agent receives all information on the selling features of the home
  - Track rider code numbers/QR Codes from each listing
  - Log in to phone system and program code with corresponding address

  - Give instructions and code number to agent to program new listing information via the telephone
  - Ensure that each sign rider call is followed up on
  - Track calls on each listing and include with seller's marketing update
  - Compile information on the listing being emailed including the address, MLS#, price and selling points of home, including any price reductions
  - Email 50 agents at a time
  - Ensure there is an unsubscribe link at the bottom of the email, and remove any agents from the mailing list that ask to be removed

LISTING CLIENTS:

- Prepare a new client file - computer and file
- Monitor and follow up on all listings
- Submit MLS information
- Submit proper information and photos to MLS.
- Photos and text to website
- Order "for sale" sign
- Sold rider up
- Email MLS print out to seller
- Email new listing to top 25 agents
- Work with Assistant on
  - Preparing property brochure
  - Just sold post cards
  - Order brochures
- "Thank-you letter" to seller
- Make extra keys, pick up keys
- Install lockbox with key
- Make sure sign is ready
- Make appointment to take pictures and virtual tour/measure house
- Make sure clients have enough fliers
- Send Just Listed cards
- Email Just Listed cards

NEGOTIATE:

- Negotiate all offers on listings
- Negotiate all offers on repairs for our sellers
- Negotiate all offers on repairs for our buyers
- Negotiate all price improvements

AFTER OFFER IS RECEIVED:

- Schedule "Sold" or "Pending" sign
- Prepare closing file

AFTER CLOSING:

- Report sold to MLS
- Schedule removal of lockbox
- Schedule removal of sold sign
- Email Just Sold cards
- Send thank you for working with our group letter
- Thank you letter to other agent
- Thank you letter to lender
- Put anniversary in database
- Add birthdays to database
- Client survey sent and received
- Remove from Internet
- Dated Jan. 20, 20_ _ closing letter and statement for buyer
- Dated Jan. 20, 20_ _ closing letter and statement for seller
- Change website to sold
- Update sold records in prelist package

Must be knowledgeable of the following programs:

- MS Office (Word, Excel, Outlook)
- MLS Systems
- QuickBooks
- Internet
- KW Command

Inventory

Lockboxes
Signs
Brochure boxes
Office Supplies

Dated this day: _______________________

Employee: ____

Agent: ____

30/60/90 DAY PLAN

Executive Assistant – Monica Reynolds Real Estate

When developing your new team member's 30-60-90-Day plan, focus on what the goal is, and how you will measure the team members achievements. Identify targets for the team member that will facilitate success in the role, and on your team. Feel free to consult the job description and KW Connect tools for ideas.

Focus on **SMART** Goals:

✓ **S**pecific: Clearly define what you are going to do.

✓ **M**easurable: Establish concrete criteria for measuring progress toward the attainment of each goal you set.

✓ **A**chievable: Goals should be challenging but a match to the knowledge and skills of the employee.

✓ **R**epeatable: The action or goal can be completed on a repeated basis.

✓ **T**imely: A commitment to a deadline helps a team focus their efforts on urgent tasks first.

30 DAY GOALS

☐ Answer the phone professionally, use the phone equipment, transfer/forward calls, pull voicemail

- o Leam and effectively communicate the Potential Buyer Conversation— obtain certification
- o Leam and effectively communicate the Potential Seller Conversation— obtain certification
- o Effectively recite Purposeful Conversations, role play, managing voicemail, closing the call — obtain certification
- o Upset client/ or I want to speak to the agent only— obtain certification

☐ Own the database and help GROW the database (minimum of 3 entries per day)

- o Data entry
- o Track database growth
- o Managing all entries that are complete...name, address, phones and emails
- o Manage Email Campaigns
- o Manage Mail Campaigns
- o Email Marketing videos
- o Know how to clean up database

- Know and effectively communicate the listing process from A to Z
  - o Pre-List Package
  - o MLS entry
  - o Customer conversations daily
  - o Seller feedback using the Purposeful Conversation
  - o Marketing/ website
  - o Maintain listing checklist and file
  - o Ask for reviews on a weekly basis
  - o Ask for referrals upon closing
  - o Maintain conversation log
  - o Maintain listing update for agent
  - o Property brochures
  - o Open houses
  - o Facebook
  - o Inventory

60 DAY GOALS

- Closing Files
  - o Build closing file checklist
  - o Proficient on maintain pending files
  - o Closing File
  - o Calling the seller with updates
  - o Schedule all inspections o Manage repairs
  - o Negotiate if licensed
  - o Monitor contingency dates
  - o Ask for reviews/ referrals on a weekly basis

- Tracking Numbers and Sources of Business weekly
  - o Appointments set
  - o Listings taken
  - o Listings under contract
  - o Buyers under contract
  - o Price reductions
  - o Closed
  - o Create and maintain an excel spreadsheet for sources

- Lead Generation Systems
  - o Support one (for example: expireds, research, letters etc.)

90 DAY GOALS

- ☐ All marketing
- ☐ All listings
- ☐ All pendings
- ☐ Database
- ☐ Phone and Purposeful Conversations
- ☐ Tracking Numbers weekly
- ☐ Goal monitoring 15th Protocol of the Month
- ☐ Helps with 1 or 2 Lead Generation systems

Team Member Name:	
Leader Name:	
30 Day Goals Completed:	
60 Day Goals Completed:	
90 Day Goals Completed:	

Buyer Specialist Description

Lead Generation/Lead Tracking

- Networking and daily prospecting for buyer leads, converting leads to appointments via scripts and subsequently, securing Buyer/Broker Agreements
- Develop schedule for lead generating to allow for 100 contacts to be made weekly (calling, door knocking, etc.) 10-15 hours weekly.
- Track leads via Lead Generating Contact Form and submit to Director of Lead Generation Friday afternoon by 3 pm
- Follow up with all leads within 1hour
- Provide contact information for lead generating/soft/B or C leads daily via email to Director of Lead Generation

Working with Buyer Clients

- Conduct Open Houses (50 annually, 2 hours each Open House to be eligible for Family Reunion contest), capture contact information via Sign-Up Sheet and follow up with prospective buyers immediately. If Open House is conducted on a property not listed by the __________ Real Estate Group, provide address and date of Open House to Admin Asst for tracking purposes
- Conduct buyer consultation appointments with all buyer clients, secure signed buyer contract documents
- Analyze buyer's needs and goals, establish home search plan and timetable
- Research MLS and preview properties
- Show properties and assist buyers in evaluating and comparing homes, providing pricing and market research
- Draft and present offers
- Ensure all required paperwork (checklist provided on Cover Page) is completed, signed and turned into to Transaction Coordinator with completed cover page upon acceptance of offer
- Assist buyers in obtaining information and vendor referrals for inspections, repairs, etc. (if needed)
- Educate buyer about our team process
- Follow up with Buyer Clients at least weekly to advise of current status and next steps. Ensure compliance with all Fiduciary Duties throughout transaction while maintaining highest standard of service delivery
- Obtain Testimonials and Referrals

Team Participation

- Attend weekly Team Meetings
- Complete 411, review and update weekly
- Attend suggested weekly Accountability Meetings with Accountability Partner to review lead generation stats, sales numbers and comprehensive 411 review
- Daily practice on Customer Conversations with lead agent, Conversations will be provided

Training

- Complete all training per Team Standard, as reflected in "First 100 Days" checklist
- Seek education opportunities to develop expert knowledge of mortgage financing, market shifts, changing regulations and all aspects of Real Estate pertaining to Home Ownership

30-60-90 DAY PLAN

Buyer Agent

When developing your new team member's 30-60-90 plan, focus on what the goal is and how you will measure the team member's achievements. Identify targets for the team member that will facilitate success in the role and on your team. Feel free to consult the job description and KWConnect tools for ideas. Focus on SMART goals:

- ✓ **Specific:** Clearly define what you are going to do.
- ✓ **Measurable:** Establish concrete criteria for measuring progress toward the attainment of each goal you set.
- ✓ **Achievable:** Goals should be challenging but a match to the knowledge and skills of the employee.
- ✓ **Repeatable:** The action or goal can be completed on a repeated basis.
- ✓ **Timely:** A commitment to a deadline helps a team focus their efforts on urgent tasks first.

30-Day Goals

- ☐ Commit to memory and effectively communicate team's process, systems, and value proposition
- ☐ Number of converted leads (this is a standard that you must determine for your team)
- ☐ Conversion ratio (this is a standard that you must determine for your team)

60-Day Goals

- ☐ Establish and implement a process to effectively capture buyer needs
- ☐ Number of converted leads (this is a standard that you must determine for your team)
- ☐ Conversion ratio (this is a standard that you must determine for your team)

90-Day Goals

- ☐ Effectively communicate neighborhood specifics to all buyers
- ☐ Effectively communicate mortgage and financial process with all buyers
- ☐ Number of converted leads (this is a standard that you must determine for your team)
- ☐ Conversion ratio (this is a standard that you must determine for your team)

Team Member Name:	
Leader Name:	
30-Day Goals Completed:	
60-Day Goals Completed:	
90-Day Goals Completed:	

Job Description: Inside Sales Agent

Overview: Responsible for making outbound calls to generate business for Buyer Specialists and Listing Specialists.

Responsibilities:

- Make calls to all leads/prospects with a goal of 50 contacts a day.
- Call the maximum number of leads/prospects each hour to produce maximum results.
- Make follow up calls assigned via the CRM.
- Call and/or email all leads/prospects until they are reached or verified as invalid.
- Follow the approved Conversations provided by the team without improvising.
- Log all calls made for the day using Mojo and Vulcan 7 systems.
- Enter detailed notes into the CRM.
- Utilize all lead/prospect tracking spreadsheets or systems provided by the Team.
- Achieve a minimum goal of three listing presentations per week after 45 days.
- Role play Conversations and objection handlers for 30 minutes every day.
- Submit a record every day of number of dials, leads, and appointments set.
- Project a gracious attitude toward all leads/prospects while on the phone and always thank each lead/prospect for their time.
- Build relationships with customers and always approach them with great respect, ask questions to determine their needs.
- Promptly communicate with Team management anything that causes discomfort as it relates to the work environment.
- Attend training sessions, conference calls, and meetings as deemed necessary by the Team.

Necessary Skills and Attributes:

- Confident and clear on phone with professional tonality at all times.
- Ability to relate to people at all levels and situations.
- Has no call reluctance.
- Keeps temper in check at all times.
- Maintains attitude that customer is always right.
- Follows instructions well.
- Ability to stay on task for extended periods.
- Positive attitude and friendly demeanor.
- Honest and ethical with high performance standards.

- Ability to memorize and internalize Conversations without modification.
- Committed to being proficient with all objection handlers.
- Strong desire to continually develop professional skills and is coachable.
- Computer literate and familiar with Microsoft Office programs and willing to learn other applications, including the CRM, as needed.

Date: ____

Employee: ____

Lead Agent: _______________________________________

WARNING!

The Telephone Consumer Protection Act (TCPA) regulates calls and text messages made using certain technologies. The TCPA includes the National Do Not Call Registry and also regulates telemarketing calls. Real estate agents who violate these laws face stiff regulatory penalties and/or potentially catastrophic legal damages. Contact an attorney to determine if your practices follow TCPA guidelines. In addition to federal laws, several states have laws governing telemarketing. Consult an attorney to determine applicable laws in your area.

30-60-90 DAYPLAN

Inbound Sales Agent

When developing your new team member's 30-60-90 plan, focus on what the goal is and how you will measure the team member's achievements. Identify targets for the team member that will facilitate success in the role and on your team. Feel free to consult the job description and KWConnect tools for ideas. Focus on SMART goals:

- ✓ **Specific:** Clearly define what you are going to do.
- ✓ **Measurable:** Establish concrete criteria for measuring progress toward the attainment of each goal you set.
- ✓ **Achievable:** Goals should be challenging but a match to the knowledge and skills of the employee.
- ✓ **Repeatable:** The action or goal can be completed on a repeated basis.
- ✓ **Timely:** A commitment to a deadline helps a team focus their efforts on urgent tasks first.

30-Day Goals

- ☐ Learn and effectively use team sales database
- ☐ Document a clear process—lead to appointment
- ☐ Learn and effectively communicate full sales cycle to direct leader
- ☐ Number of leads converted into appointments (this is a standard that you must determine for your team)

60-Day Goals

- ☐ Create and document an effective lead follow-up process
- ☐ Attend weekly accountability meetings with team and report productivity and sales metrics
- ☐ Number of leads converted to appointments (this is a standard that you must determine for your team)

90-Day Goals

- ☐ Memorize and effectively communicate Conversations on value proposition
- ☐ Effectively handle objections
- ☐ Manage and own sales database
- ☐ Number of leads converted to appointments (this is a standard that you must determine for your team)

Team Member Name:	
Leader Name:	
30-Day Goals Completed:	
60-Day Goals Completed:	
90-Day Goals Completed:	

Recommended Reading for Leaders

Business Leadership

How the Mighty Fall: And Why Some Companies Never Give In Jim Collins	***The Five Dysfunctions of a Team: A Leadership Fable*** Patrick Lencioni	***EntreLeadership: 20 Years of Practical Business Wisdom from the Trenches*** Dave Ramsey
Pizza Tiger Tom Monaghan and Robert Anderson	***The Effective Executive: The Definitive Guide to Getting the Right Things Done*** Peter F. Drucker	***The New One Minute Manager*** Ken Blanchard and Spencer Johnson
Trammell Crow, Master Builder: The Story of America's Largest Real Estate Empire Robert Sobel	***The Leader Who Had No Title: A Modern Fable on Real Success in Business and in Life*** Robin Sharma	***The Long-Distance Leader: Rules for Remarkable Remote Leadership*** Kevin Eikenberry and Wayne Turmel
Keys to the Vault: Lessons from the Pros on Raising Money and Igniting Your Business Keith J. Cunningham	***Managing Up: How to Forge an Effective Relationship with Those Above You*** Rosanne Badowski and Roger Gittines	

***Be sure to listen to Gary Keller's Podcast: Think Like A CEO**

Wealth Building

The Millionaire Real Estate Agent Gary Keller, Dave Jenks, and Jay Papasan	***Happy Money: The Science of Smarter Spending*** Elizabeth Dunn and Michael Norton	***Wealth Can't Wait: Avoid the 7 Wealth Traps, Implement the 7 Business Pillars, and Complete a Life Audit Today!*** David Osborn and Paul Morris
The Millionaire Real Estate Investor Gary Keller, Dave Jenks, and Jay Papasan	***The Simple Path to Wealth: Your Road Map to Financial Independence and a Rich, Free Life*** JL Collins	***Secrets of the Millionaire Mind: Mastering the Inner Game of Wealth*** T. Harv Eker
The Psychology of Money: Timeless Lessons on Wealth, Greed, and Happiness Morgan Housel	***Tax-Free Wealth: How to Build Massive Wealth by Permanently Lowering Your Taxes*** Tom Wheelwright	***HOLD: How to Find, Buy, and Rent Houses for Wealth*** Steve Chader, Jennice Doty, Jim McKissack, Linda McKissack, and Jay Papasan
Shift: How Top Real Estate Agents Tackle Tough Times Gary Keller, Dave Jenks, and Jay Papasan	***The Richest Man in Babylon*** George S. Clason	***Retire Inspired: It's Not an Age, It's a Financial Number*** Chris Hogan
Million Dollar Habits: *10 Simple Steps to Getting Everything You Want in Life* Robert Ringer	***The Money Answer Book*** Dave Ramsey	***Thou Shall Prosper: Ten Commandments for Making Money*** Rabbi Daniel Lapin

Growth and Personal Development

The ONE Thing: The Surprisingly Simple Truth Behind Extraordinary Results
Gary Keller and Jay Papasan

Thinking in Bets: Making Smarter Decisions When You Don't Have All the Facts
Annie Duke

The 12 Week Year: Get More Done in 12 Weeks than Others Do in 12 Months
Brian P. Moran and Michael Lennington

2030: How Today's Biggest Trends Will Collide and Reshape the Future of Everything
Mauro F. Guillen

Make Your Bed: Little Things That Can Change Your Life...And Maybe the World
Admiral William H. McRaven

Unlimited Power
Anthony Robbins

The Go-Getter: A Story That Tells You How to Be One
Peter B. Kyne

Psycho-Cybernetics Deluxe Edition: The Original Text of the Classic Guide to a New Life
Maxwell Maltz

Fooled by Randomness: The Hidden Role of Chance in Life and in the Markets
Nassim Nicholas Taleb

Performing Under Pressure: The Science of Doing Your Best When It Matters Most
Hendrie Weisinger and J. P. Pawliw-Fry

Relentless: From Good to Great to Unstoppable
Tim S. Grover and Shari Wenk

Hit Makers: The Science of Popularity in an Age of Distraction
Derek Thompson

Who Moved My Cheese?
Spencer Johnson

212 The Extra Degree: Extraordinary Results Begin with One Small Change
Sam Parker and Mac Anderson

Fish!: A Proven Way to Boost Morale and Improve Results
Stephen C.Lundin, Harry Paul, and John Christensen

The Energy Bus: 10 Rules to Fuel Your Life, Work, and Team with Positive Energy
Jon Gordon

Atomic Habits: An Easy & Proven Way to Build Good Habits & Break Bad Ones
James Clear

Upstream: The Quest to Solve Problems Before They Happen
Dan Heath

The Tipping Point: How Little Things Can Make a Big Difference
Malcolm Gladwell

The Present: The Gift for Changing Times
Spencer Johnson

The Road Less Stupid
Keith J. Cunningham

Customer Service

Building a StoryBrand: Clarify Your Message So Customers Will Listen
Donald Miller

Customers for Life: How to Turn That One-Time Buyer into a Lifetime Customer
Carl Sewell and Paul B. Brown

The 10 Golden Rules of Customer Service: The Story of the $6,000 Egg
Todd Duncan and Deb Duncan

Delivering Knock Your Socks Off Service
Performance Research Associates

Raving Fans: A Revolutionary Approach to Customer Service
Ken Blanchard and Sheldon Bowles

The Service Culture Handbook: A Step-by-Step Guide to Getting Your Employees Obsessed with Customer Service
Jeff Toister

Legendary Service: The Key is to Care
Ken Blanchard, Kathy Cuff, and Vicki Halsey

Be Our Guest: Perfecting the Art of Customer Service
The Disney Institute

The New Gold Standard: 5 Leadership Principles for Creating a Legendary Customer Experience Courtesy of the Ritz-Carlton Hotel Company
Joseph Michelli

What Your Assistant Will Learn This Month

1. Develop and define their job description
2. Assistant will know agent's job description and how best to support it
3. Importance of a schedule and the value of posting it
4. Understand and define the top priorities
5. Clarity of the big Real Estate picture
6. Clear expectations of what is expected daily
7. Ways to be efficient such as time blocking and time management

Policy and Procedures Tab Suggestions
1.
2.
3.

Session 4: Homework Assignment

1. ____

2. ____

3. ____