The Perfect Real Estate Assistant

Session 16

Agent Session

Growing Your Business, Team, & Affiliates

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Session 16—Agent Session: Growing Your Team

Objectives for Today's Session

1. Review the interview process.
2. Review the perfect profile of a great executive assistant.
3. Importance of a 90-day review.
4. Make the most of referrals.

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!

Notice
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.
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Agenda for Today's Session

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Get Ready!

Complete the questions on this page to prepare for your coaching session.

When do you hire your first assistant?

___

When do you hire your second assistant?

___

What is your system for hiring?

___

Do you use the DISC?

___

When do you use the KPA?

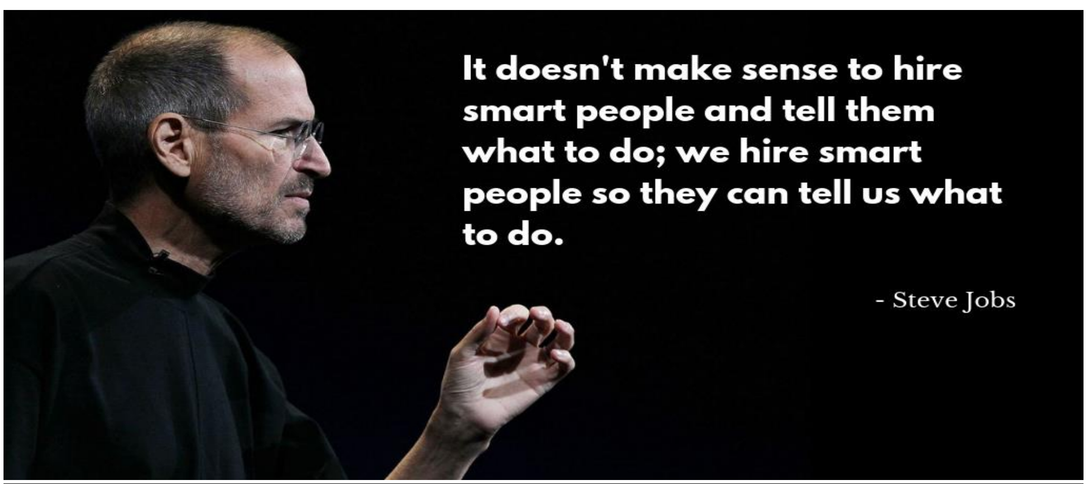
___

When do you hire a buyer/showing agent?

___

What is the definition of TEAM?

___



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$ THE VALUE OF AN ASSISTANT $

- **4 Family / Friends Referrals**…Avg. commission 10K = **$30,000** (Assistant / licensed 25% referral fee)
- **10 Referrals from Current under Contract Clients**...Avg. commission 10k = **$100,000**
- **20 Reviews from Current in Contract Clients...**minimum of 4 leads/ sold = **$40,000**
- **Database**...Grow the database by 600 Completes in 12 months = **$ Priceless**
- **Systems**...Put in 2 lead generation systems = **$Priceless**
- **Client Appreciation Party Coordinator** = **minimum $10,000**
- **Client Appreciation Party Referrals** = **$20,000**
- **Marketing Facebook/ Command** ....minimum 6 new contracts = **$60,000**
- **Recruit one Buyer Agent** ....minimum 12 contracts = **$60,000**
- **Listing Systems** = **$Priceless**
- **Closing Systems** = **$Priceless**
- **Ritz Carlton Customer Service** = **$Priceless**
- **First Impression Phone** = **$Priceless**
- **Phone Screener** = **$Priceless**
- **Vacation Back Up** = **$Priceless**
- **450+ page Policy and Procedures Manual** = **$Priceless**

Total....PRICELESS

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System for Hiring

1. Identify the need. Does the need justify a new hire?

2. Identify the job. Does it make sense?

3. Write & prepare a job description and schedule.

4. Submit ad to local publications.
   The small neighborhood papers are great!

5. Review resumes and call only on ones that seem fit for you.

6. Block off one afternoon at one-hour intervals for interviewing.

7. Do not interview more than 2 people per day.

8. Use the rating sheet and make detailed notes.

9. Two ways to hire:
   - By-the-book
   - By instinct

10. Do not hire on the on-the-spot.

11. If you interview 6, eliminate 3.

12. Stop the interview when your gut says no. "Thank you for coming in, I will let you know next week what we have decided."

13. Have the remaining 3 come back for another interview and meet with the agent also.

14. Give them a skills test.

15. You ***must*** give them a skills test.

16. You ***must*** give them a skills test!!!!

17. At the second interview go over the job description, schedule, and life story.

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18. At the second interview have the agent and/or assistants meet with the applicant. Disclose the negative and disclose the positives!

19. Hire the best candidate based on talent, availability, attitude and desire.

20. Create an employee file.

21. Know their personality type.

BEFORE YOU HIRE:

1. Test skills:
    a. Computer
    b. Typing
    c. Phone
    d. Spreadsheet
    e. Basic marketing/graphics (brochures, flyers)

2. Check references.

3. Prepare a job description.

4. Prepare a schedule.

5. Review paid holidays and vacation policy.

6. Review Internet and cell phone policy.

7. Review dress code.

8. Prepare compensation

9. Validate KPA and DISC

GOOD LUCK!!!

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Sample Advertisement

EXECUTIVE ASSISTANT

Immediate opening for Assistant Real Estate Executive.

You should be an organizer, a positive person, a good communicator – both written and verbal, have excellent computer skills, have a good sense of humor, be a fast learner with a quick mind and be willing to work hard and smart. You'll work in a fast-paced real estate office in _________ (city). We offer an exciting atmosphere in a people-oriented business.

This is NOT an entry-level position. Please indicate salary desired.

The first step is to email your resume to:

Email:_________________________

TIPS:

1). Do not give your phone number

2). Do not identify yourself

3). Be patient

4). Please have each applicant that you choose to interview take a KPA and/or DISC Assessment

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Websites for Posting Jobs

Listed below are a few websites that post jobs:

- careerbuilder.com
- monster.com
- craigslist.org
- jobs.com
- hotjobs.yahoo.com
- jobfox.com
- your-job-finder.com
- indeed.com
- ziprecruiter.com

Also, check your local area for websites and groups that advertise positions within your area.

Network for Finding Talent

- Use your database
  - Send an email advertising the position that is open
- Ask your affiliates
  - Ask each affiliate to give you 3 names that would be great additions to your team. Give them a deadline to encourage them (for example, "If possible, please have 3 names to me by Monday.")
- Facebook
- Current real estate assistants
- Current real estate clients

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Résumé Checklist

- **General review:**
  - ➢Review the job description for the position you are attempting to fill.
  - ➢Note minimum requirements needed and refer to them often as you review resumes/applications.
  - ➢Ignore the applicant's name, address or personal information to limit subconscious biases.

- **Consistent job flow and applicable experience**:
  - ➢Check work experience for applicability to the position for which the person is applying, length of time in each position, promotions or awards received, reason for leaving each position.
  - ➢Is there a consistent job flow? You don't want a "job jumper", someone who has a job change every six months or less.
  - ➢Note gaps in employment but do not assume they were caused by negative reasons.

- **Customer service background:** You want someone with good people skills and experience.

- **Real estate background:** Someone already familiar with the industry brings with them a knowledge of the business and that can save you training time.

- **Educational background:** This can give you an idea of the applicant's motivation for self-advancement, although it should not be the only consideration. Check educational background for qualifications necessary to successful job performance.

- **Specific job skills and training:** Note special skills (i.e., expertise in various computer programs/software, office equipment). A variety of skills can indicate the applicant is easy to cross-train and can pick up new skills readily.

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- **Recommendation letter:** A recommendation letter from a previous employer can be a big plus since someone who hired the applicant is evaluating their work for you.

- **Professional presentation:** Look for well-written sentences, no typos, and correct punctuation. Neatness and general appearance of the resume is very important as it shows you what the applicant considers to be a final written product. Remember, your assistant will be preparing written materials that reflect on your professionalism. If the applicant already knows what is appropriate, you are on the same track from day one.

- **Do you want to know more about the person?** Is there something that makes you want to meet and personally interview the applicant? This can be an overall impression or a specific item. If you don't want to know more about the applicant after reading the resume, don't waste your time on an interview.

- **Questions:** Note on a separate piece of paper any pertinent questions that arise when reviewing the resume and ask those during a telephone screen.

- **Screen into groups:** Divide resumes/applications into 3 groups –
  - One for those that closely match job requirements and for which a telephone screen is appropriate,
  - One for those who meet some requirements and may be considered secondarily, and
  - One for those who do not meet the requirements at all.
  - If necessary, screen the top group again to further narrow down the candidates; on average, about 10 resumes per position should be enough.

- **Telephone screening:** During telephone screening briefly describe the position, location, hours, and salary range (if appropriate) and ask if the candidate is still interested in being considered. If so, ask for brief clarification on any important questions raised during your initial review. As appropriate, schedule an interview date and time.

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Best Practices for Webcam Videos

Best Practices for Webcam Videos

1. Dress Comfortably and Professionally

- For the part of you that will be on camera, maintain a professional appearance.
- Choose a solid-colored dress shirt or blazer and avoid fabrics with small or distracting patterns that may draw attention away from what you are saying.

2. Look Your Best on Webcam

- With a USB webcam or the built-in webcam on your laptop, make sure that the camera lens sits at or above eye level, no higher than your hairline.
- Do not sit too close to the camera.
- Position your webcam far enough away to capture your shoulders and your entire face with some room to spare.
- Consider a setup where you are standing for the presentation.

3. Use Soft Lighting from The Front

- Avoid locations with low light or too much backlighting (windows in the background are often a challenge for webcams).
- Light yourself from the front with soft, indirect light, and minimize other lighting in the room, particularly from windows or light sources behind you.

4. Look Behind You!

- Be cognizant of what's behind you and keep the background simple by avoiding anything that looks busy or cluttered. Beware of windows that let in natural light.
- Choose a plain wall as you background.
- Avoid using virtual backgrounds as they sometimes distort how you appear.

5. Connect with Your Audience through Eye Contact and a Smile

- Look at your webcam lens and smile as you make your presentation. And don't forget to blink!
- Avoid watching yourself if your recording software shows your video feed in the corner.

6. Use a USB Microphone for Better Sound Quality

- Best to use a USB microphone that will better minimize background noise.
- Minimize other sounds in the room. Turn off any machines or fans that may create excess white noise.

7. Do A Test Video and Practice with Your Webcam Setup Prior to Going Live

- Record a test video or two — not only to make sure your setup is giving you the look and sound quality you want, but also to practice presenting in front of a video camera.
- It's fine to prepare and use a script.

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Tips for Successful Interviews

Try to gain as much information as possible from the applicant. The easiest way to accomplish this is by creating an atmosphere that allows the applicant to speak freely. Below are ways to facilitate open discussion:

1. Try to put the applicant at ease right away at the beginning of the interview. If the applicant feels comfortable, he/she will be more like to share information.

2. If you find that the applicant freezes on a particular question, go on to the next question. It takes time for some applicants to relax and feel comfortable with the interviewing process.

3. Try to ask questions that facilitate discussion; avoid questions that require a “yes” or “no” answer.

4. Do not ask leading questions. Keep the questions open-ended so that the applicant has the opportunity to speak freely.

5. Be sure to ask only job-related questions.

6. Listening skills are essential in an interview. It is important to let the applicant speak without interruption. Remember, the purpose of the interview is to obtain as much information as possible.

7. While the applicant is speaking, watch his/her body language and facial expressions. These expressions will provide you with additional insight about what is being discussed at the time.

Federal law regulates the type of questions that may be asked during an interview. Questions relating directly or indirectly to age, sex, race, color, national origin, religion, or disabilities should be avoided. If information that you need about an applicant potentially infringes on any of the above categories, be sure the question relates to a bona fide occupational qualification or is required by law to be asked. For example, while you may not ask if the applicant has a disability, you many ask if there is anything that precludes the applicant from performing the essential functions of the position for which he/she is applying.

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There also may be state laws that preclude certain questions during an interview. If you are not sure if a question violates federal or state legislation, check with your legal counsel.

The way in which questions are phrased is particularly important. Below are examples of unacceptable and acceptable interview questions:

Unacceptable: Are you a U.S. citizen?

Acceptable: Are you lawfully employable in the United States either by virtue of citizenship or by having authorization from the INS and the Labor Department?

Unacceptable: How old are you?

Acceptable: Are you over the age of eighteen?

Unacceptable: Do you have children? What are your childcare arrangements?

Acceptable: Questions about family status are not job related and should not be asked.

Unacceptable: What clubs or organizations do you belong to?

Acceptable: What professional or trade groups do you belong to that you consider relevant to your ability to perform this job

Unacceptable: When did you graduate from high school?

Acceptable: What schools have you attended?

Unacceptable: What is your maiden name?

Acceptable: Have you ever been known by another name? (Only ask this if you need to contact a former employer, because a legal liability may exist if an applicant claims you were trying to determine her ethnic background and did not hire because of it.

Unacceptable: Do you smoke?

Acceptable: Our smoking policy is …… Can you adhere to it? (Be aware of any state laws that relate to smoking; some states prohibit an employer from excluding applicants for off the job smoking

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Over-the-Phone Questions

SCRIPT:

- "Tell me about your job history."
- "Describe the perfect job for you."
- "What are you the best at?"
- "What are your hobbies?"

THE PURPOSE OF THE CALL:

1). ____

2). ____

3). ____

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First Interview Questions

1. Why are you considering giving up your current job or position?
2. What exactly did you do at your last job? Tell me what your average workday was like and what you were responsible for handling.
3. What accomplishments are you most proud of professionally? Personally?
4. Have you ever thought about being a real estate agent?
5. If you had more spare time, what would you do with it?
6. How would you handle a customer who called and was angry?
7. How would you handle a customer who was upset about something the agent had not delivered? Could you turn that situation around and make the person a happy client?
8. Do you tend to dig into the tough problems in the morning, afternoon or late in the day?
9. Why do you do the tough stuff at that time?
10. How many tasks can you handle at once?
11. How do you organize your work?
12. What kinds of people annoy you?
13. Tell me about the worst supervisor you ever worked for.
14. Tell me how you handled working in that situation.
15. What decisions did you make at your last job and how did you go about making those decisions?
16. Have you had problems working with others?
17. What experience have you had in real estate? Have you ever purchased or sold a home or handled rentals?

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18. What aspects of working in a real estate office interest you?

19. What do you hope to be doing two years from now? How much do you want to be earning?

20. Tell me about your biggest frustrations in your business/working career.

21. What has been your most rewarding work-related experience?

22. What are your career goals? (Are they serious, well thought-out goals, coinciding with this position?)

23. If anything would take you away from working, what would it be? (Kids, smoke break, etc.)

24. Do you have reliable transportation?

25. Have you attended any seminars?

26. How fast can you type? May I test you?

27. What computer skills do you have specifically?

28. Have you driven around (city)? Can you find specific neighborhoods?

29. Have you ever been a real estate agent?

30. Have you ever processed a closing?

31. Have you taken any courses regarding title insurance or worked in title insurance?

32. Have you taken any time management courses?

33. Do you use a daily planner/calendar of any type?

34. Have you had extensive experience with over-the phone client service? What was it?

35. What does a “client for life” mean to you?

Bonus

How likely are you to refer your family and friends if you join our team?

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Second Interview Questions 2

1. Where do you hope to be in five years?

2. What do you think it takes to be a successful real estate agent? Have you personally ever worked with an agent?

3. Describe the time you were most motivated at any of your previous jobs.

4. When were you least motivated?

5. How do you schedule your time?

6. How do you set priorities and solve problems of conflicting priorities?

7. How long would you be interested in holding a position such as this?

8. What is your greatest strength? What is your greatest weakness?

9. Describe the worst day on your last job. How did you handle it?

10. Describe your dream job.

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Interview Rating Sheet

Name of Prospective Employee: ______________________________________

Date and Time of interview: ___________________Time Arrived: _________

*(Note: Rate the following items on a scale of 1 –5; **1** is the lowest and **5** is the highest score an applicant can receive.)*

Appearance 1 2 3 4 5
Positive "can do" attitude 1 2 3 4 5
Poise 1 2 3 4 5
Voice 1 2 3 4 5
Quick to Learn 1 2 3 4 5
Can prioritize well, organized 1 2 3 4 5
Self-starter 1 2 3 4 5
Can deal with difficult people 1 2 3 4 5
Team player 1 2 3 4 5
Open to criticism 1 2 3 4 5
Problem solver 1 2 3 4 5
Mature 1 2 3 4 5
Dependable 1 2 3 4 5
Focused 1 2 3 4 5
Goal Setter 1 2 3 4 5
Willing to make decisions 1 2 3 4 5
Supports my weaknesses 1 2 3 4 5
Good telephone voice 1 2 3 4 5
Could handle difficult customers diplomatically & effectively 1 2 3 4 5
Not afraid to "handle problems/calls" 1 2 3 4 5
Good penmanship 1 2 3 4 5
Familiarity with real estate 1 2 3 4 5
Typing skills 1 2 3 4 5
Computer skills 1 2 3 4 5
Knows your area/streets very well 1 2 3 4 5

General Comments: ____

____

____

____

Final Hiring Interview

1. Review the Schedule and determine if it is acceptable to the potential employee.

2. Review the Job Description and determine if it is acceptable to the potential employee.

3. Review the Expectations/Challenges:
    a. No personal computer emails.
    b. No web shopping.
    c. No mini seminars.
    d. Everything with regards to clients/database/contracts is *strictly confidential.*
    e. Everything regarding the agent is *strictly confidential.*
    f. Must be on time to work.
    g. No personal problems brought to the office.
    h. No personal phone calls.
    i. Must follow office policy and procedure manual.
    j. Dress in business attire.
    k. Deadlines on contracts are a priority.
    l. Phone etiquette always.
    m. Communicate, communicate
    n. ________________________________
    o. ________________________________

4. Potential employee understands the Expectations/Challenges:
    a. *Script:* Congratulations! I will provide a great working and business environment. Every day is different and never boring. Every day is a learning experience and together we will be a great TEAM. TEAM stands for -- Together Each Achieves More! I want you to consider this the beginning of a new and exciting career.
    b. Have them sign the Office Policy and Procedures Manual "Confidentiality Agreement".
    c. Have them sign the Job Description and Schedule.
    d. Go over the "90 – Day Review".
    e. Review the dress code and pay periods.
    f. Compensation

Script for not hiring:

Thank-you for your application and we appreciate your time. We have currently filled the position. We will keep your resume on file.

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Fun Questions to Ask - "Final" Interview

After asking more formal questions around their resume, operations, recruiting and creating systems, ask these questions…it is fun and unexpected for the candidate and gives you some additional information about their personality.

1. Greatest thing about (whatever state you are in) was......

2. Best food ever is ....

3. Dream vacation is....

4. By far the best movie is....

5. Best dog name is ......

6. Best mode of transportation is....

7. If I could live anywhere, it would be....

8. Lunch with a notable or famous person / dead or alive would be ....

9. Would you rather have unlimited 1st class airline tickets OR never pay for food at a restaurant?

11. Best paid day off would be.......

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PRIOR TO START DATE CHECKLIST

1. Meet with Agent Services at Market Center
(license, printer, training calendar, email, profit share)

2. Appointment with Director of Operations to cover training
a. Review KW website
b. MC Leadership
c. Kellerisms
d. KW Leadership
e. Events
f. Training

3. Practice scripts and record yourself doing each one.

4. Compile a list of 250 friends, family, and past co-workers.
a. Name, Address, Phone, Email

5. Add your new place of employment to your LinkedIn account.

6. Add your new place of employment to your Facebook profile.

7. If licensed, verify that dues and fees are up to date.

8. Review team website.

9. Familiarize yourself with the prelist package and buyer package.

10. Watch these videos on KW Connect:
a. Listing presentation
b. Buyer Presentation
c. Database
d. Create your own personal GPS

11.Go over WI4C2TES with Director of Operations

12. Go over 411 and Team Goals with Director of Operations.

13. Personal To-dos
a. Press Release
b. Letters to neighbors (I'm on a team…any role)
c. Sign up for Ignite
d. Sign up for BOLD

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RATE YOURSELF ON THESE 20 IMPORTANT TRAINING ITEMS

Let's take the evaluation....Rate yourself on a scale of 1-10

Prior to the first day:

____1. You provided a clear expectation of the job.

____2. You went over how you built your career and how you treat your clients.

____3. You reviewed pay/ days off/ holidays/ sick days/ jury duty.

____ 4. You went over the job description in detail, item by item.

____ 5. You went over the daily schedule.

____ 6. You went over in detail the 30/60/90.

Starting on the first day

____ 7. You monitored the 30/ 60/90.

____ 8. You cleared your schedule the first 2 days to train & work with your assistant.

____ 9. You reviewed each file with your assistant.

____ 10. You followed the process of training:

a. you watch / I do

b. you do / I watch

c. you do/ I review

____ 11. You role-played scripts.

a. Answer the phone

b. I (agent) am not in

c. Potential buyer

d. Potential seller

e. Problem call

____ 12. You asked these 3 questions each day:

1. How are you?

2. What are you working on?

3. How can I help you?

____ 13. You say “thank-you” at least once a day.

____ 14. You have a meeting each day to go over the “to-do” list.

____ 15. You introduced your assistant to your team and office.

____ 16. You introduced your assistant to your affiliates.

____ 17. You ordered business cards for your assistant.

____ 18. You talked about your value proposition and how to deliver that at all times to the clients.

____ 19. You enrolled your assistant for classes at the market center/office.

____ 20. You signed your assistant up for The Perfect Real Estate Assistant course demonstrating you are education based and making an investment to help them and your clients.

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Vacation/Leave of Absence Request and Approval Form

Employee Name: ____

Employee Hire Date:______________________________________

Dates requested for Leave of Absence:

___________________________ to _____________________

Reason for Leave Request: ____

____

Employee Signature: ___________________________________

Date: ______________________________

Note: If requesting a medical leave of absence, please attach a copy of doctor's verification.

COMPANY USE ONLY

Our records indicate that you have earned _____________ days of vacation and are authorized to take ____________ days per this request, which will result in a balance of ____________ vacation days.

You are authorized ______________ days of unpaid leave of absence.

We are pleased to have approved your vacation / leave of absence request.

Authorized Approval: ____

Date: _________________

This form is placed in the employee file.

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Absence Report

Name ________________________________ Date of Absence ______________

Return Date _______________

REASON FOR ABSENCE:

□ Illness □ Holiday □ Vacation

□ Jury Duty □ Personal Time □ Suspension

□ Family Death □ Leave Without Pay □ Accident on Job □ Unknown

Explanation: ____

____

ABSENCE WAS:

□Expected in Advance

□Reported on 1st Day

□Excused

□Unexcused

Prepared By: _____________________________

Employee Signature: ________________________

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Dress Standards

Minimum requirements for men:

- Dress shirt
- Slacks
- Shoes
- Ties (optional, but preferred)

Minimum requirements for women:

- Professional dress / slacks / skirts
- Coordinating blouses / sweaters / tops
- Shoes

Not acceptable:

- Leggings
- Shorts
- Jeans
- T-shirts
- Tank tops
- Flip-flops

Company policy: Our company policy is that we do not have "casual days." Business attire is expected and required every day.

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Team Member Profile Sheet

Team Member Name:

BRE#

Cell Phone:

Home Phone:

Personal Email:

Anniversary Date of Hire:

Date of Birth:

Home Address:

Spouse's Name:

Kid's Names: 1) _______________DOB: ___________
2) _______________DOB: ___________
3) _______________DOB: ___________
Pet's Names: 1) ___________________
2) ___________________

Favorite Soda:

Favorite Candy Bar:

Favorite Food:

Favorite Fast Food:

Favorite Restaurant:

Favorite Starbucks Drink:

Favorite Store:

Favorite College:

Favorite Pro Sports Team:

Favorite Pastime:

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ASSESSMENT OF TEAM WORTH / "WALL OF VALUE"

We have organized processes, systems, experience, and leadership that will allow you to focus on the activities that make you money! Being on our team, you will make more money, have more opportunities, and have greater freedom than you would working on your own.

Benefit/Opportunity	Value	Frequency	Total
Half hour Weekly Coaching by Agent	$1,000.	12	$12,000.00
Closing and Customer Care Ass't	$3,333.	12	$39,996.00
Listing Manager	$3,333.	12	$39,996.00
Database Management Program	$1,000.	12	$12,000.00
Boomtown	$1,500.	12	$18,000.00
Rally Pages	$300.	12	$3,600.00
Mojo Dialer	$1,150.	12	$13,800.00
Office Rent	$195.	12	$2,340.00
Office Equipment	$300.	12	$3,600.00
IT Support	$2,500.	1	$2,500.00
Website	$250.	12	$3,000.00
Open House Signs	$300.	12	$3,600.00
Open House Coordination	$500.	1	$500.00
Business Cards	$100.	12	$1,200.00
Database E-Mail Reports	$25.	12	$150.00
Education/Yearly Convention	$4,000.	1	$4,000.00
Care for Business while on Vacation	$5,000.	1	$5,000.00
Comprehensive Marketing Program	$5,000.	12	$60,000.00
Printed Materials, Brochures, Etc.	$200.	12	$2,400.00
Quality, Pre-selected Affiliates			Added
A Branded App			Added
Complete Systems, Processes			Added
Checklists and Scripts			Added
Leadership			Added
Team Support and Accountability			Added
Reduced Risk, Stress: Increased Security			Added
Reputation/Strength of Successful Team			Added
Leverage to Focus on Business			Added
To re-create what we provide may cost:		**TOTAL**	**$227,982.00**

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THE PATH OF VALUE AND JOY ON OUR TEAM

Services, Training, Community, Support and Culture

SERVICES

Keller Command - Docu-Sign – Facebook – Zillow - Dave Ramsey - Homelight

Keller Mortgage - MOJO

TRAINING

Weekly Team Meeting – Ignite – Bold – KSCORE - MAPS Fasttrack - Market

Center Training Calendar - Team Training Library - Daily Team Roleplays

COMMUNITY

Weekly & Quarterly Team Meetings – Team Christmas Party - RED Day

Family Reunion - KW Segments (luxury, land, new home, military, KWYP)

Mega Camp - Spring MM - Fall MM - Client Events (Pie Giveaway, Shred Day, 4th of July, etc.)

SUPPORT

Listing Manager - Transaction Manager - Director of Operations - Sales Manager - Weekly 411

CULTURE

WI4CTES - Team Mission, Vision, Values, Beliefs and Perspectives – God,

Family, Business

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CORRECTION CONVERSATION

Problem: ____

____

____

____

____

Solution: ____

____

____

____

____

Meet Again On: (day, date, time) ____

______________________________ ______________________________

Supervisor Employee

______________________________ ______________________________

Date Date

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Agent Referral Growth Plan

20_ _ Year RECAP

20_ _ Statistics: 5100 agents in Agent Database

20_ _ Sales: 25 from referrals

GOALS FOR 20_ _

1. Goal to have 10,000 top agents in the Agent Referral Database. Each month the number is given to Lead Agent.
2. Email monthly on the 10th of every month to remind agents who we are and the market we service. Emails should mention lead agent.
3. Emails can also be a great value and sales tip we learned at FR or Mega.
4. Database must contain email, address, office phone and cell phone.
5. Database to contain referral information and amount of $ earned.
6. Create a list of agents who have sent us a referral over the years. Call them at least twice a year and thank them. Also, make sure they are the first we send a referral to if we have one for that area.
7. Learn and use Kelle!

Goal Recap 20_ _

1. 10,000 in Database (minimum)
2. Agent Referral Goal: 36
3. Incoming 24/ Outgoing 12

Future Goals

20_ _ Agent Referral Goal: 50

20_ _ Agent Referral Goal: 75

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Vendor/Affiliate Referral Checklist

Goal: To get at least one referral of a buyer or seller every single month from the vendor/affiliate we promote.

Here is a list of current affiliate participants:

A. Lender

B. Title

C. Home Warranty

D. Home Inspector

E. Real Estate Attorney

F. Escrow/Closing Office

G. Moving Company

H. Termite

1. Each month call each affiliate and thank them for a great job. Ask for a referral. Review how many "deals" we gave them for the month and year to date.

2. Each quarter have a face-to-face meeting asking for referrals and reviewing the numbers.

3. Make sure we have every one of the affiliates' employees' phone numbers, home address and email for referrals from their office.

4. Each month an affiliate is invited to a team meeting and may bring "lunch".

6. Mastermind with each affiliate in December, review the # of transaction we gave them.

7. Review the # of referrals they sent us.

8. Review the # of their employees and who used us for real estate help or referred us business.

9. Review any other contributions/help they made to help our team.

10. Always ask," What are you doing for other agents you are not doing for us?"

11.Set goals with them regarding what their contribution and /or support will be for the team for the next year.

12. Ask the question: How do we get promoted to your database? What are you willing to do to promote us?

13. Ask them for a list of their personal 25 friends and family we can add to our database.

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14. Invite them to the Seller Seminar monthly to participate and meet future clients.

15. Assistant to keep spreadsheet on referrals from Vendor/Affiliate and report numbers monthly

<u>Conversation for vendor referrals</u>

1.How do we get your employees or staff from your company to send referrals to me?

2.How can we jointly utilize our databases to increase business and visibility?

3.What can you provide to help our business?

4.What are you doing to help other agents that you are not doing for me and my team?

5.How many deals did I give you this year? How many referrals can you give me each month? How do you plan to achieve that? How can I help?

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VENDOR CONVERSATION FOR CLIENT EVENT PARTICIPATION

Good morning!

This is ____________ and I wanted to first thank you for being a great partner and the excellent job you do with our clients and team.

We really appreciate all you do.... (service…mention that). We always recommend you and use you as our preferred vendor.

(When appropriate add the number transactions you did last year and what the goal is for this year ...you will be sending them)

I would like to offer you an opportunity to partner with us on a client appreciation party. We have held these before and we have a tremendous success rate with our clients and the party.

Would you be willing to contribute a monetary contribution of ___________ toward the venue, marketing and food and beverage for 200 people?

Depending on the vendor:

$100

$500

$1000

$2500

THANK-YOU AFTER THE EVENT

(Email day after, card sent the next, 1 week after call from agent)

I wanted to personally thank you for the great contribution and your help with the client appreciation party. My team and I really appreciate all you do with your great service and of course how you supported us with our successful event. It is my goal, and my team's goal, to always support you and your business. I look forward to seeing you soon and to sending you even more business.

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Vendor Spreadsheet

Vendor	Referral	$$(Contribution)	Deals/Month	Printing	Runner
Cleaning					
Carpet Cleaning					
Carpet & Flooring					
Closing Gifts					
Dee Signs					
Escrow					
Handyman					
Home Warranty					
Heating/Air					
Home Inspection					
Landscaper					
Lender					
Locksmith					
Moving Company					

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Implementation System

This system is to optimize your success when implementing new systems in your office.

1. Meet with your agent and identify all the systems that you need to add or improve.
2. List in terms of importance, only two projects per month. If it is the 15th and they are completed, naturally go on to the next system!
3. Do not implement more than one system at a time.
4. Do not start ANY NEW SYSTEMS UNTIL THE FIRST IS COMPLETED.
5. One person is the point person/lead dog, if others are involved.
6. CHECKPOINTS ARE A MUST!
7. It is okay to move the deadline….

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What Your Assistant Will Learn….

1. $24k mistake... Monica's team made two times

2. Customer experience versus customer service

3. How to create a client for life... developing repeat and referral business

4. Working on Policy and procedures manual... and giving the table of contents (TAB suggestions)

5. Top 15 things every agent wants from their assistant

6. Teach your assistant how to become irreplaceable

7. Business plan and tracking numbers

8. Why teams fail... what to do to prevent and how to empower your assistant

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Policy and Procedures Tab Suggestions
1. 2. 3.

What I Learned Today …

____

____

____

____

Session 16: Homework Assignment

1. ____

2. ____

3. ____

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