

Agent Role

Non-Negotiables

- Two **Listings** per week
- Four **PAMPed** Appointments per week
- Daily Communication with current clients
- Action all Enquiries within an hour of receiving them
- Weekly Vendor Report
- **90min Prospecting** Monday – Friday dta
ABC Clients
Top 10 VIP's
Top 100 – Past Clients / Past Buyers
Top 20 Buyers
- Attend 1 Buyer Appointment minimum per day
- Saturday open home Attendees to be added with notes before leaving on Saturday afternoon
- All open home attendees **Two Points of Contact** by Monday 12pm
- **Settlement calls** (2 days, 2 weeks and 2 months)
- 10 Hand Written cards posted per day
- Maintain Database

Assistant Role

Non-Negotiables

- 200 **Seasonal Letters** – Per Week
- 200 **LMR Letters** - Per Week

Once letters are sent forward the agent and associate the address for that week

Once Listing is Signed

1. Introduction email sent to vendor by 10am next day
2. Flowers sent to home within 24 hours
3. Email confirming photo shoot time
4. Property link on realestate.com emailed to agent and associate once live.

Once Contract is Signed

1. Buyer is emailed account details for deposit same day as contract is signed
2. Contract sent to all parties within 24 hours of signing

No matter what these two points have to be done, if there are issues they need to be rectified by the buyer manager or agent within these timeframes.

Bonus at the end of each quarter is determined on how well this is done.

Sale Associate Role

Non-Negotiables

- One genuine ISA per week – PAMP and time booked in calendar
- Communication with the Agent after every buyer appointment
- Action all Enquiries within an hour of receiving them
- eBrochure sent for all open homes on Friday by 12pm
- Saturday open home Attendees to be added with notes before leaving on Saturday afternoon
- Qualify Buyers, What price, What Area, Plans for current home
- All open home attendees Two Points of Contact by Monday 12pm
- Attend 1 Buyer Appointment minimum per day
- 20 buyer calls per day
- Settlement calls (2 days, 2 weeks and 2 months)
- 10 Hand Written cards posted per day
- Maintain Database
- Contracts 5% deposit, correct names or entity, checklist completed and handed to admin within 24 hours
- Weekly Checklist handed to Agent on Friday

Job Description: Sales Agent Personal Assistant

Title: Personal Assistant

Reports to: Sales Agent

Specific Objectives:

1. Complete all prospecting activities in a timely manner
2. Provide administrative support in the management of new listings
3. Efficient administration of new listings is completed with exceptional service
4. Ensure all vendor experiences reflect exceptional service
5. Accuracy in the completion of required auction campaign activity in order to meet deadlines

Core Competency Areas:

Function	Tasks
Update database	<ul style="list-style-type: none">▪ Update database with vendor details as required
Prepare listing and presentation materials	<ul style="list-style-type: none">▪ Send pre-Listing kits to potential vendors▪ Prepare a current market analysis for vendors▪ Complete all background searches as required
Prepare new listings paperwork	<ul style="list-style-type: none">▪ Generate proposals with required Agency Agreements
Complete new listings & follow-up activities	<ul style="list-style-type: none">▪ Complete the listing – appraisal checklist for new vendor or lost opportunity▪ Liaise with the Sales Support Coordinator to book auctioneer▪ Ensure all new listing letters are completed▪ Ensure signboard reflects type of campaign
Prepare for the Open For Inspection	<ul style="list-style-type: none">▪ Ensure the open for inspection advertising has been completed▪ Ensure all brochures are delivered prior to open for inspection
Open For Inspection activity	<ul style="list-style-type: none">▪ Ensure the property is properly prepared for the 1st open for inspection▪ Set up the property for the open for inspection▪ Attend all required pen for inspections

Function	Tasks
Open for Inspection follow up activity	<ul style="list-style-type: none"> ▪ Complete the vendor sales progress letters after each open for inspection ▪ Ensure all elements of the marketing campaign are complete and delivered as required ▪ Ensure final contract has been received from the vendors solicitor ▪ Contact all attendees at the open for inspection ▪ Maintain database with the open for inspection attendees
Auction Activities & Sales	<ul style="list-style-type: none"> ▪ On site preparation ▪ Contact open for inspection attendees that have confirmed interest in the property ▪ Complete Property File ▪ Complete auction summary ▪ Ensure contract letters are completed and sent as required ▪ Send contracts to solicitors as required ▪ Complete banking as required ▪ Ensure web is updated with the auction result
Private Treaty & Sale	<ul style="list-style-type: none"> ▪ Contact open for inspection attendees that have confirmed interest in the property ▪ Completed Property File ▪ Ensure contract letters are completed and sent as required and update database ▪ Contracts are sent solicitors as required ▪ Complete banking as required ▪ Ensure web is updated ▪ Notify the settlements coordinator as required
Client Services	<ul style="list-style-type: none"> ▪ Ensure that all client service programs are delivered as per the Sales Agent instructions

Skills/Abilities:

Skill/Ability	Level of Importance to Position (H,M,L)
<ul style="list-style-type: none">• Very good Negotiation skills• Very good Decision making and problem solving skills• Very good Interpersonal skills• Very good Written and verbal communication skills• Very good Time Management and organisational skills• Very good Knowledge of the company's policy and procedures• Very good Team Skills• Good Computer Skills	<ul style="list-style-type: none">• High• High• High• High• High• High• High• Medium

Key Performance Indicators (KPI's):

1. Obtain four (4) sales leads per month
2. Add sixty (60) buyers to the database every month
3. Mail merge 2,000 per month
4. Contact home owners for new listings
5. Contact home owners with sales results
6. Deliver 1,000 DL cards for new listing
7. Deliver 1,000 DL cards for each sale
8. Send 250 just listed letters per listing
9. Send 250 Just sold letters per sale
10. Obtain two (2) expired listing leads per month
11. Role play for at least 2 hours per week

Signed: _____

Dated: _____

How to remunerate your Sales (Blue) PA Salary

\$52,000 Base + Commission:

- 1% to \$1,000,000
- 2% to \$1,000,000 to \$1,500,000
- 3% to \$1,500,000 to \$2,000,000 and over

In addition to:

\$500 per month when the following 4 KPIs are achieve:

1. KP1 – 10/10/20 just listed/sold
2. KP2 – 10 appraisals monthly
3. KP3 – 10 buyer appts month
4. KP4 – 20 new client email & SMS opt-ins

GCI = \$1,500,000

- 1% up to \$1,000,000 - \$10,000
- 2% up to \$1,500,000 - \$10,000

When achieved:

- \$500 x 12 months = \$6,000 Bonus

Total:

\$52k + \$20k + \$6k = \$78k

GET S#[IT] DONE

PB X 22

Building The 'A' Team

“FIND A GROUP OF PEOPLE WHO
CHALLENGE AND INSPIRE YOU, SPEND
A LOT OF TIME WITH THEM, AND IT
WILL CHANGE YOUR LIFE FOREVER.”



eview
GROUP

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#1000agents



BUILDING THE 'A' TEAM

Success is never a solo performance.

It requires a high-performance team to be truly effective. A group of individuals that uses its collective genius to make a significant and meaningful impact, united with the same vision.

When you hire the right people to do the right activities at the right time, with a commitment to excel in customer service, reaching your goals becomes elementary.

The journey moves beyond personal satisfaction and grows into a collective force that transcends the individual. When that happens, everyone wins. The client experience becomes more memorable; the work becomes more enjoyable and the rewards both financially and personally for each team member is amplified.

In this workbook, you will be provided with suggested job position descriptions and key duties and tasks. Because every agent and team work differently and have different needs, the job descriptions should only serve as a guide. To build a comprehensive and easy to follow action list, it is best to complete the provided '28 Day Assistant Planner.' This activity will highlight the different requirements and assist in identifying the needs of the team (or what others in the industry refer to as an Effective Business Unit -EBU) that will serve as the foundations of the team game plan.

It is important to note. Having the desire to build an 'A' team is one thing. Committing to the actions required is another. It is an incredible opportunity to influence, mentor and take others with you on the journey. Equally, it comes with huge responsibility.

Wishing you every success.

The Eview Group

SIX DEFINING STEPS TO BUILD AND MANAGE AN INCREDIBLE TEAM

What makes for an effective team?

For a team to be truly effective, its members must embrace the same vision and be motivated to bring that vision to life. They must share clear, measurable goals, and be committed to each play their part in the overall success of the group.

‘Teamwork makes the Dream work’ cannot be understated.

The following fundamentals are key to that success.



1. Define the Vision

Clearly define the purpose of the team, including the overall outcome it has been brought together to achieve.

Example: 'To exceed customer expectations at every opportunity and be a leading force and agents of choice in the marketplace.'

2. Assemble the team

Great teams are comprised of individuals that passionately embrace the vision, believe their contribution is meaningful and are motivated to give their best effort.

All team members should trust, respect and support each other. Select members with complementary skills and abilities, who can bring a diverse range of qualities and ideas to the table.

Who needs to be on the team and do they need to be full time part time or virtual?

- (a) Client Experience Manager
- (b) Administration Manager
- (c) Prospector / Lead Generator
- (d) Buyers Agent
- (e) OFI Host
- (d) Junior – repetitive/low impact but important tasks
- (e) Social Media Manager
- (f) Database Manager

3. Determine the goals

Once the team is established and united behind a shared, compelling purpose, the next step is to break the vision down into smaller, manageable goals and tasks. Outline the required tasks in a schedule, with agreed deadlines, milestones and responsibilities. Decide the role that each team member will play.

Example: 'To sell 50 properties per year and achieve a GCI target of \$750,000.'

4. Set expectations

To ensure that each member understands what is expected of them, define a standard of conduct for the team. Setting clear standards from the outset will ensure that each member's conduct and contributions are appropriate.

- (a) Team Meetings
- (b) Days of Work / Holidays
- (c) Standard Operating Procedures e.g. How quickly do we respond to buyer enquiries or how often will we communicate with our sellers?

5. Monitor and review

Regularly review the group's performance through team meetings and one-on-one catch ups to ensure that progress is being made.

- (a) Daily Huddles (morning/afternoon)
- (b) Weekly Meetings
- (c) Monthly Review
- (d) Quarterly Reviews
- (e) Yearly Review
- (f) Scheduled one on ones

6. Celebrate and reward

Make the time to regularly recognise, reward and celebrate both team and individual performance.

- (a) Appropriate bonus structure and or remuneration
- (b) Non-monetary rewards. e.g. Theatre/movie tickets
- (c) Team Building Activities – e.g. Bowling nights

The above list is not exhaustive and a tailored 'gameplan' will evolve as the team evolves. Allow and be pre-pared to fine tune and always improve the way your new team will grow to perform together.



“IN EVERY ASPECT OF LIFE, HAVE A
GAME PLAN, AND THEN DO YOUR
BEST TO ACHIEVE IT”

EXAMPLE JOB DESCRIPTIONS



Listings Manager

Main Tasks:

- Prospect and source listing opportunities
- Maintain a high level of knowledge about the local area and market
- Attend appraisals and listing presentations
- Follow up on past appraisals and listing presentations
- Set and maintain focus on my ideal week
- Take all selling inquiries via email or phone
- Do the Comparative Market Analysis prior to appraisals and listing appointments
- Maintain consistent contact with our established clients via mail, phone, email, SMS, client functions
- Manage the pipeline seller database
- Attend some Open Homes
- Manage final offers and negotiate them through to completion
- Speak to all current vendors at least twice per week
- Lead, coach and mentor the team
- Conduct twice weekly meetings
- Generate and act on new ideas for the team
- Improve market share
- Ensure team members have adequate resources and training
- Attend at least one networking function per week
- Form and maintain relationships with other businesses for referrals
- OTHER: _____
- OTHER: _____
- OTHER: _____

KPI's:

- 4 appraisals or listing appointments per week
- 2 new listings per week
- 20 established clients calls per week
- 10 past appraisal follow up calls per week
- 5 Thank You cards per week

Buyer Manager

Main Tasks:

- Prospect and source listing opportunities
- Be familiar with all office and local listings
- Maintain a high level of knowledge about the local area and market
- Set and maintain focus on my ideal week
- Take all buyer inquiries via email or phone
- Qualify all buyer inquiries and if possible refer them to a mortgage broker
- Manage the buyer database
- Maintain consistent weekly contact with all buyers via mail, phone, email, SMS, client functions etc
- Identify buyers who are potential sellers and manage a specific trail for them including a change-over costs meeting and destination CMA
- Refer all seller leads to the Listings Manager
- Conduct all Open Homes and Buyer Inspections
- Make all Open Home and Buyer Inspection follow-up phone calls
- Build relationships with buyers and heavily service a small group of buyers
- Attend the twice weekly team meetings and contribute
- Attend at least one networking function per week
- Form and maintain relationships with other businesses for referrals
- OTHER: _____
- OTHER: _____
- OTHER: _____

KPI's:

- 1 appraisal or listing appointment per week
- 1 new listing per week
- 15 to 20 buyer appointments per week
- 4 to 6 buyers qualified and put into the system and on a trail per week
- 5 established buyer calls per week
- 50 outbound buyer calls per week
- 150 service area prospecting calls per week
- 10 potential vendor calls per week
- 5 Thank You cards per week
- 1 contract per week

Administration Manager & Client Care

Main Tasks:

- Prospect and source listing opportunities
- Be familiar with the team listings and clients
- Set and maintain focus on my ideal week
- Ensure all team members are taking breaks to eat
- Manage all special projects and marketing projects for the team
- Prepare and deliver the pre-listing kit
- Open client files and commence the property trails
- Organise and design property marketing including internet, photography, signage, newspaper etc
- Tag and store property keys – maintain a key register
- Load internet advertising
- Book all advertising with the office administration department
- Organise the material for Open Homes
- Manage all administration and file management
- Up-date client information and manage the client database
- Up-date and manage the Service Area
- Deal with initial phone and email inquiries and direct them where required to the correct person
- Manage the settlement process
- Type all Agent Appointment and Contract forms
- Assist at Open Homes when needed
- Prepare the Buyer Packs for the Buyer Manager
- Attend the twice weekly team meetings and contribute
- Attend at least one networking function per week
- Form and maintain relationships with other businesses for referrals
- OTHER: _____
- OTHER: _____
- OTHER: _____

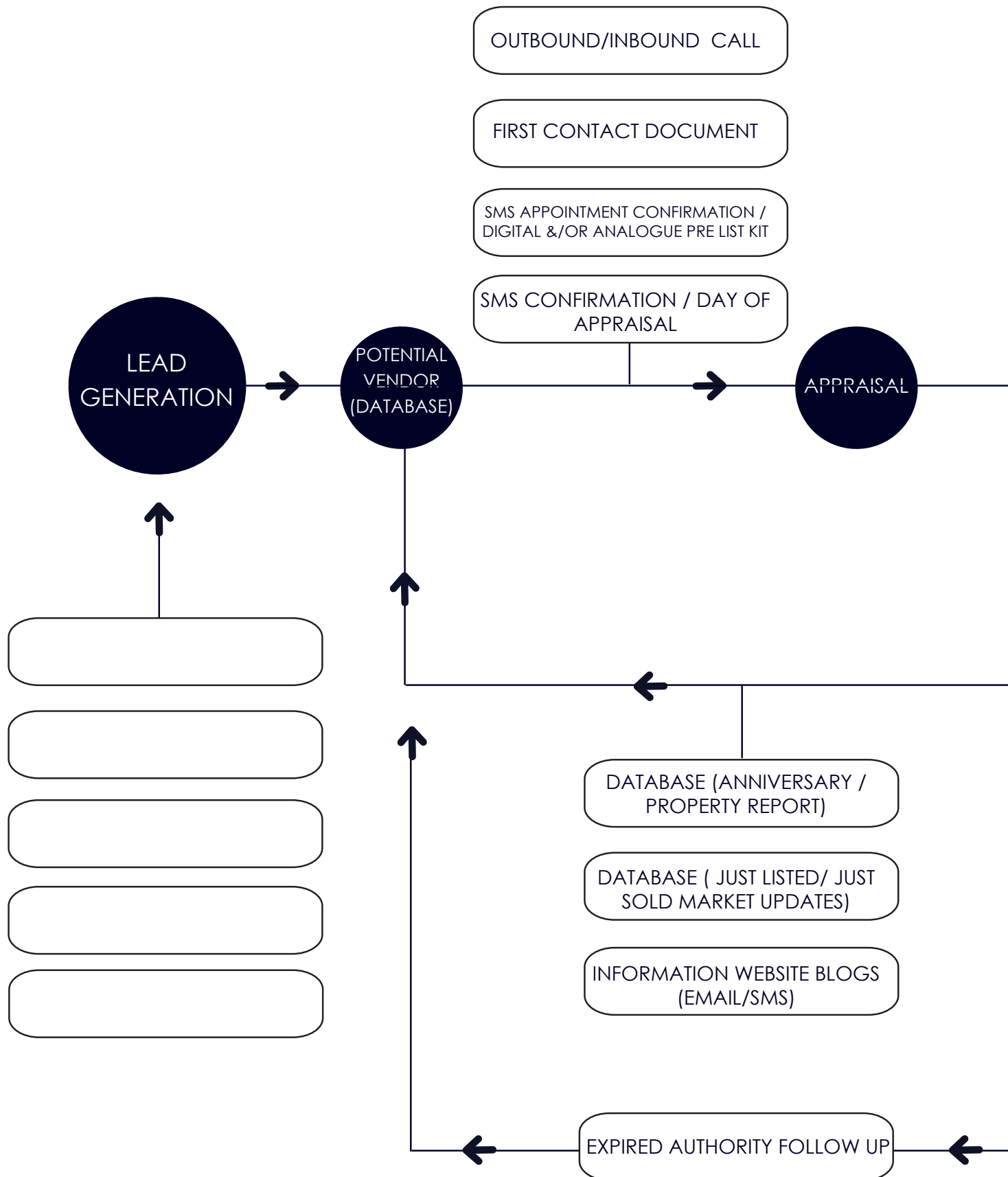
KPI's:

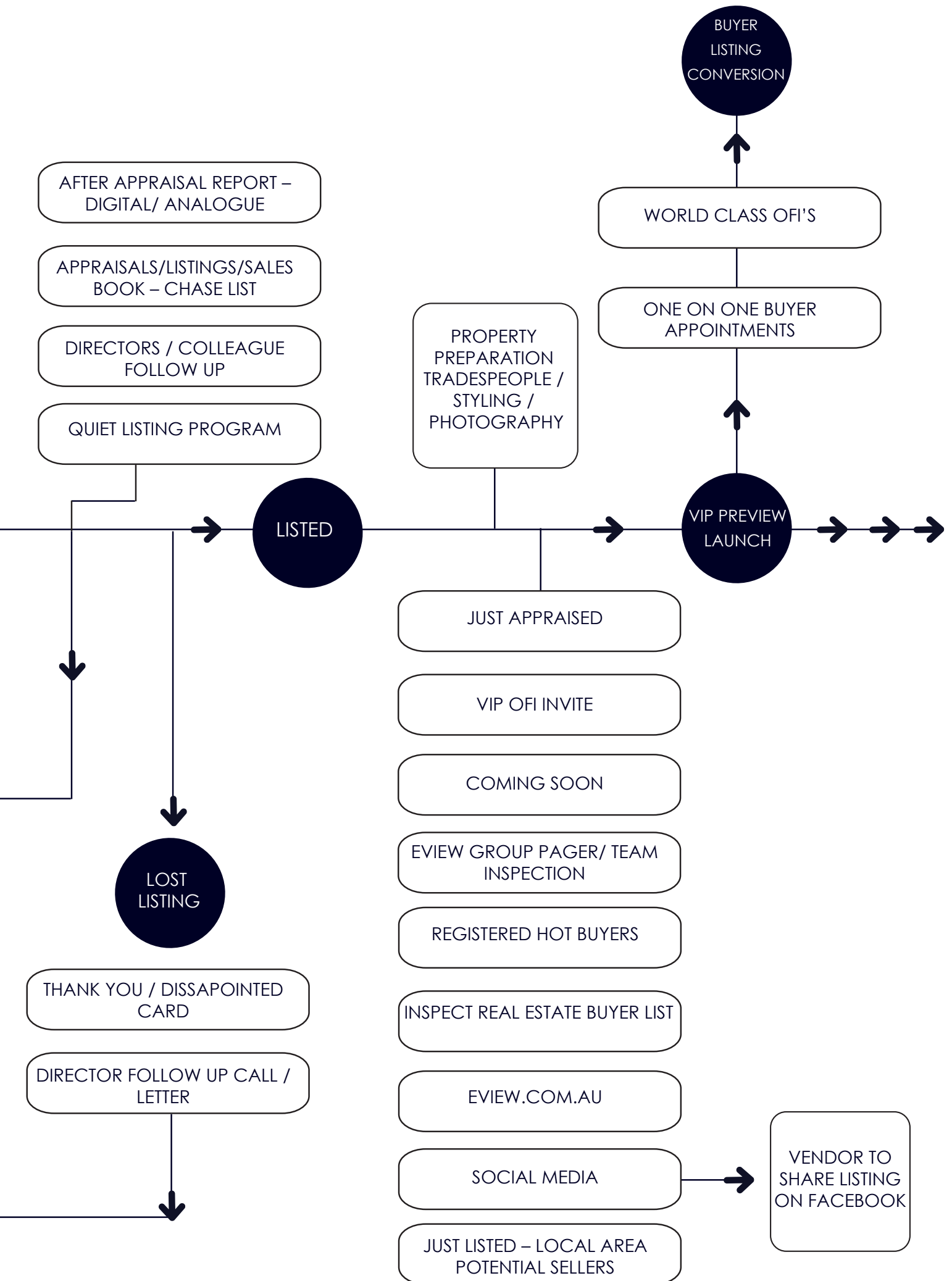
- 200 CD tasks per week
- 430 letters to established clients per month
- 8 client anniversary cards per month
- 10 client congratulations cards per month

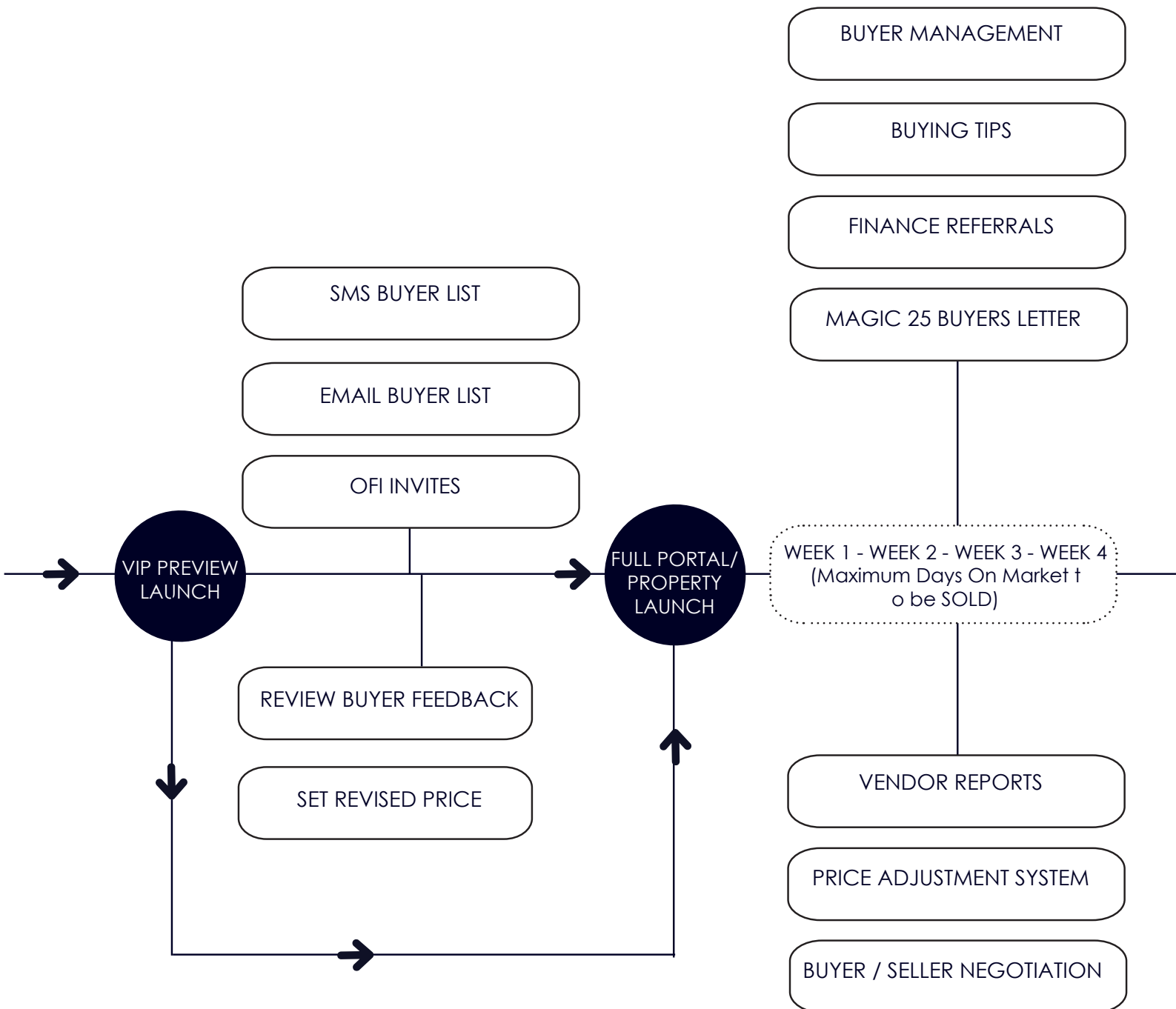
“IF YOU DON'T HAVE
AN ASSISTANT YOU
ARE ONE”

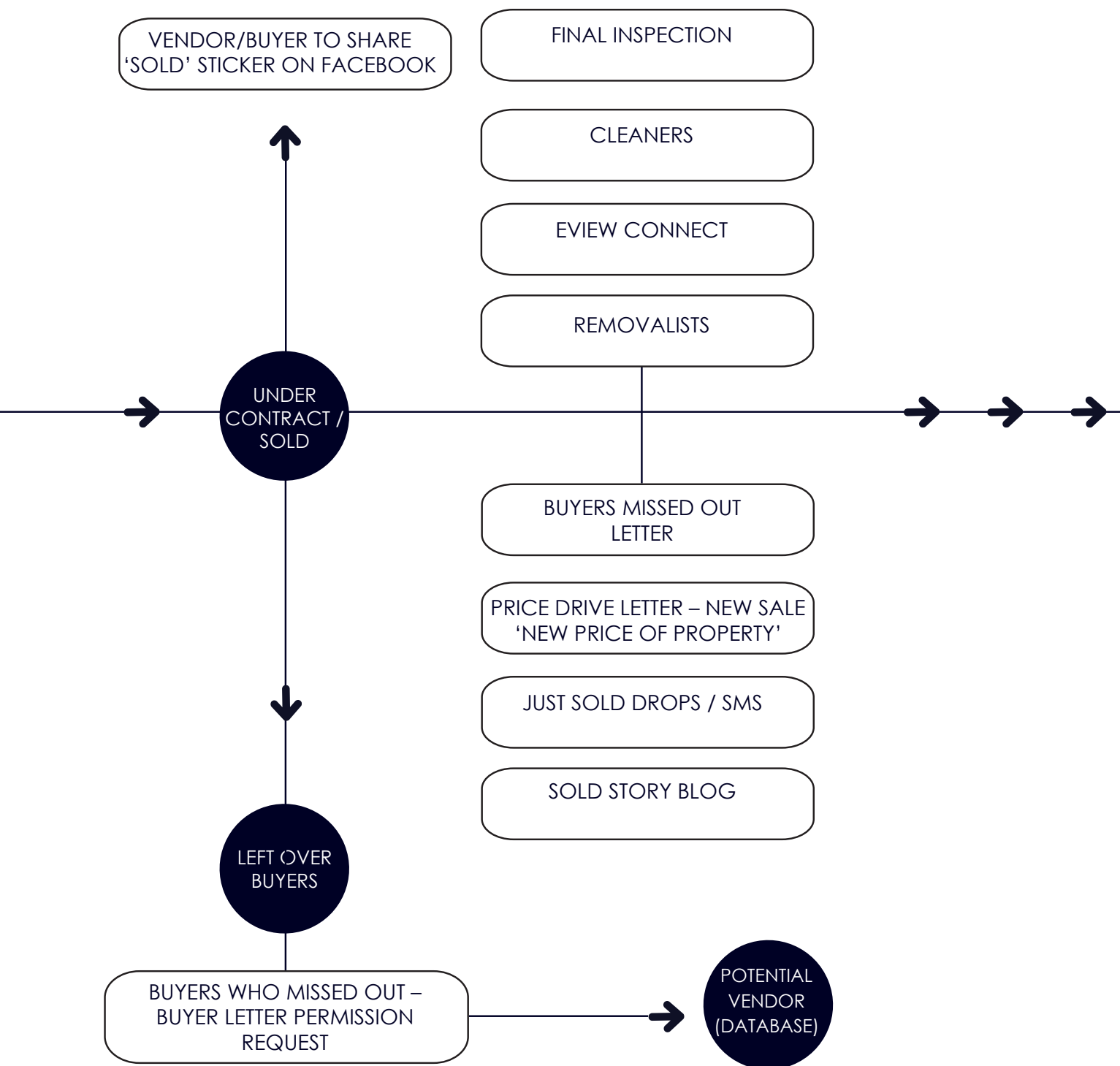


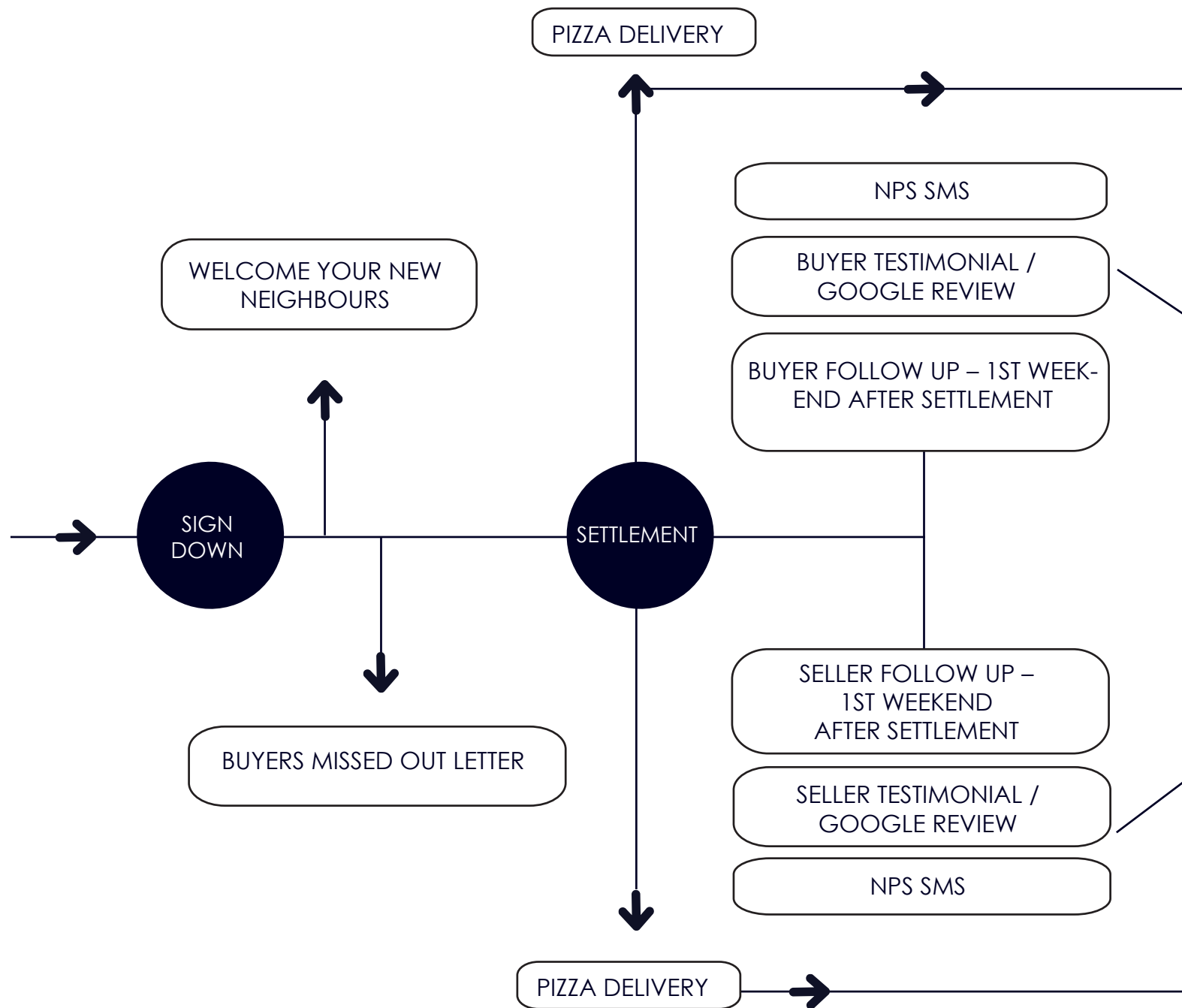
APPRAISED - LISTED – SOLD – SETTLED TIMELINE

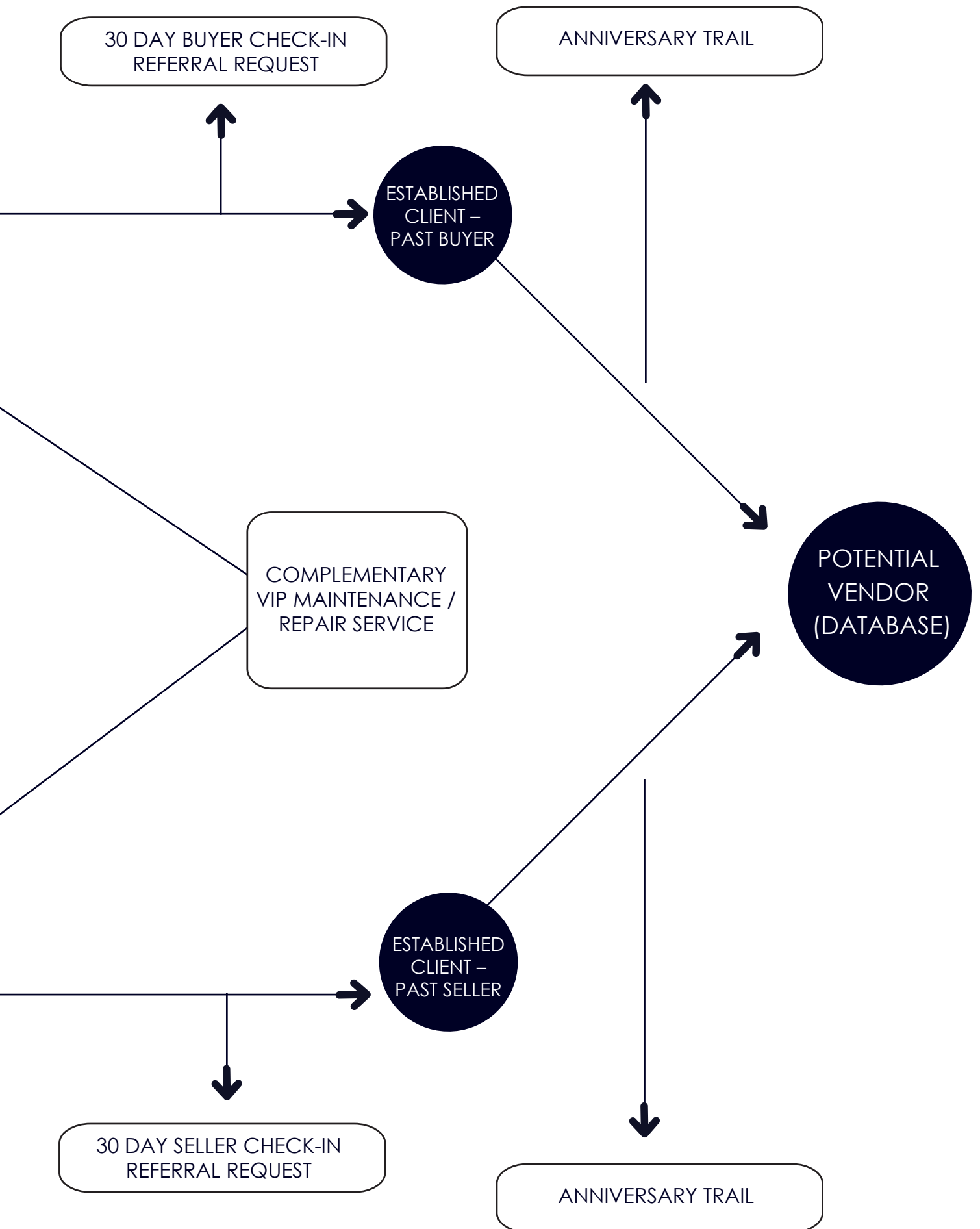












28 Day Assistant Planner



The

'What can an assistant do for you?'

28 day planner:

HOW TO...

(a) This 28 Day Planner will allow you to evaluate the level of talent that you will require to add to your team based on your day to day activities. It will also help indentify those tasks which may be out-sourced to virtual or low cost assistants.

(b) Complete by adding your 'daily activity' (as it happens) in the respective column each day for the next 28 days. Please note
- every activity must be recorded however minor it may seem.

(c) Alongside each activity, simply 'tick' the box that best assigns that task to a team member with the appropriate talent/skill levels to complete that task efficiently.

(d) At the end of each day, NOTE activities that NEEDED to have been completed, that you were not able to complete yourself, that could have been assigned to an assistant. Assign the task by ticking the respective talent column.

(e) At the end of each week, review your entries and activities and estimate how much time you would have saved and guesstimate your efficiency level had those tasks been the responsibility & completed by an assistant.

THE 'WHAT CAN AN ASSISTANT DO FOR YOU?'

28 DAY PLANNER

WEEK 1 DATE:

WEEK 1 DATE:

MONDAY / Daily Activity	(a)	LEAD AGENT (ONLY) High level client interaction	HIGH VALUE ASSISTANT High to Medium level client interaction	LOW SKILL / OUTSOURCE TALENT Low (or no interaction) level client interaction	TUESDAY / Daily Activity	LEAD AGENT (ONLY) High level client interaction	HIGH VALUE ASSISTANT High to Medium level client interaction	LOW SKILL / OUTSOURCE TALENT Low (or no interaction) level client interaction
Vendor Call	(b)	✓ (c)			Send out buyer alerts for new listings			✓
Book Photography				✓	Deliver Pre List Kit			✓
Appraisal		✓			Buyer Offer	✓		
Letterbox Drops				✓	Appraisal	✓		
Solicitor Call		✓			OFl Times on website			✓
Photography Shoot				✓	Second Buyer Appointment		✓	
Bank Valuation Inspection			✓		Contract Preparation		✓	
Property Write Up			✓		Hot Calls	✓		
THAT COULD HAVE BEEN DONE: (d)					THAT COULD HAVE BEEN DONE:			
Should have sent SMS with Under Offers to all OFl buyers				✓	Could have dropped buyer letter for buyers who missed out on 1 Smith St			✓
Warm Buyer Follow Up			✓		Needed to do Anniversary Cards			✓
Settlement Gifts				✓	Should have dropped BDA Area Just Listed Drops			✓
					Vendor Feedback Reports		✓	

Example:

WEEK 1 DATE:

SATURDAY / Daily Activity	LEAD AGENT (ONLY) High level client interaction	HIGH VALUE ASSISTANT High to Medium level client interaction	LOW SKILL / OUTSOURCE TALENT Low (or no interaction) level client interaction	THE WEEK IN REVIEW / COMMENTS: (e)
Negotiated with buyer	✓			
OFl Assistant		✓		
Complaint from a buyer	✓			
OFl Preparation Pointer Boards			✓	
Authority Preparation		✓		
Private Buyer Appointment		✓		
THAT COULD HAVE BEEN DONE:				
Should have dropped door knock Just sold or home open invites to neighbours			✓	
Follow Up Buyer Calls		✓		
Data Entry			✓	

MONDAY / Daily Activity	LEAD AGENT (ONLY) High level client interaction	HIGH VALUE ASSISTANT High to Medium level client interaction	LOW SKILL / OUTSOURCE TALENT Low (or no interaction) level client interaction
THAT COULD HAVE BEEN DONE:			

TUESDAY / Daily Activity	LEAD AGENT (ONLY) High level client interaction	HIGH VALUE ASSISTANT High to Medium level client interaction	LOW SKILL / OUTSOURCE TALENT Low (or no interaction) level client interaction
THAT COULD HAVE BEEN DONE:			

WEDNESDAY / Daily Activity	LEAD AGENT (ONLY) High level client interaction	HIGH VALUE ASSISTANT High to Medium level client interaction	LOW SKILL / OUTSOURCE TALENT Low (or no interaction) level client interaction
THAT COULD HAVE BEEN DONE:			

THURSDAY / Daily Activity	LEAD AGENT (ONLY) High level client interaction	HIGH VALUE ASSISTANT High to Medium level client interaction	LOW SKILL / OUTSOURCE TALENT Low (or no interaction) level client interaction
THAT COULD HAVE BEEN DONE:			

FRIDAY Daily Activity	LEAD AGENT (ONLY) High level client interaction	HIGH VALUE ASSISTANT High to Medium level client interaction	LOW SKILL / OUTSOURCE TALENT Low (or no interaction) level client interaction
THAT COULD HAVE BEEN DONE:			

SATURDAY Daily Activity	LEAD AGENT (ONLY) High level client interaction	HIGH VALUE ASSISTANT High to Medium level client interaction	LOW SKILL / OUTSOURCE TALENT Low (or no interaction) level client interaction
THAT COULD HAVE BEEN DONE:			

SUNDAY Daily Activity	LEAD AGENT (ONLY) High level client interaction	HIGH VALUE ASSISTANT High to Medium level client interaction	LOW SKILL / OUTSOURCE TALENT Low (or no interaction) level client interaction
THAT COULD HAVE BEEN DONE:			

WEEK 1 IN REVIEW / COMMENTS:

MONDAY / Daily Activity	LEAD AGENT (ONLY) High level client interaction	HIGH VALUE ASSISTANT High to Medium level client interaction	LOW SKILL / OUTSOURCE TALENT Low (or no interaction) level client interaction
THAT COULD HAVE BEEN DONE:			

WEEK 2 DATE:

TUESDAY / Daily Activity	LEAD AGENT (ONLY) High level client interaction	HIGH VALUE ASSISTANT High to Medium level client interaction	LOW SKILL / OUTSOURCE TALENT Low (or no interaction) level client interaction
THAT COULD HAVE BEEN DONE:			

WEDNESDAY / Daily Activity	LEAD AGENT (ONLY) High level client interaction	HIGH VALUE ASSISTANT High to Medium level client interaction	LOW SKILL / OUTSOURCE TALENT Low (or no interaction) level client interaction
THAT COULD HAVE BEEN DONE:			

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THAT COULD HAVE BEEN DONE:			

FRIDAY Daily Activity	LEAD AGENT (ONLY) High level client interaction	HIGH VALUE ASSISTANT High to Medium level client interaction	LOW SKILL / OUTSOURCE TALENT Low (or no interaction) level client interaction
THAT COULD HAVE BEEN DONE:			

SATURDAY Daily Activity	LEAD AGENT (ONLY) High level client interaction	HIGH VALUE ASSISTANT High to Medium level client interaction	LOW SKILL / OUTSOURCE TALENT Low (or no interaction) level client interaction
THAT COULD HAVE BEEN DONE:			

SUNDAY Daily Activity	LEAD AGENT (ONLY) High level client interaction	HIGH VALUE ASSISTANT High to Medium level client interaction	LOW SKILL / OUTSOURCE TALENT Low (or no interaction) level client interaction
THAT COULD HAVE BEEN DONE:			

WEEK 2 IN REVIEW / COMMENTS:

MONDAY / Daily Activity	LEAD AGENT (ONLY) High level client interaction	HIGH VALUE ASSISTANT High to Medium level client interaction	LOW SKILL / OUTSOURCE TALENT Low (or no interaction) level client interaction
THAT COULD HAVE BEEN DONE:			

TUESDAY / Daily Activity	LEAD AGENT (ONLY) High level client interaction	HIGH VALUE ASSISTANT High to Medium level client interaction	LOW SKILL / OUTSOURCE TALENT Low (or no interaction) level client interaction
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THAT COULD HAVE BEEN DONE:			

FRIDAY Daily Activity	LEAD AGENT (ONLY) High level client interaction	HIGH VALUE ASSISTANT High to Medium level client interaction	LOW SKILL / OUTSOURCE TALENT Low (or no interaction) level client interaction
THAT COULD HAVE BEEN DONE:			

SATURDAY Daily Activity	LEAD AGENT (ONLY) High level client interaction	HIGH VALUE ASSISTANT High to Medium level client interaction	LOW SKILL / OUTSOURCE TALENT Low (or no interaction) level client interaction
THAT COULD HAVE BEEN DONE:			

SUNDAY Daily Activity	LEAD AGENT (ONLY) High level client interaction	HIGH VALUE ASSISTANT High to Medium level client interaction	LOW SKILL / OUTSOURCE TALENT Low (or no interaction) level client interaction
THAT COULD HAVE BEEN DONE:			

WEEK 3 IN REVIEW / COMMENTS:

MONDAY / Daily Activity	LEAD AGENT (ONLY) High level client interaction	HIGH VALUE ASSISTANT High to Medium level client interaction	LOW SKILL / OUTSOURCE TALENT Low (or no interaction) level client interaction
THAT COULD HAVE BEEN DONE:			

TUESDAY / Daily Activity	LEAD AGENT (ONLY) High level client interaction	HIGH VALUE ASSISTANT High to Medium level client interaction	LOW SKILL / OUTSOURCE TALENT Low (or no interaction) level client interaction
THAT COULD HAVE BEEN DONE:			

WEDNESDAY / Daily Activity	LEAD AGENT (ONLY) High level client interaction	HIGH VALUE ASSISTANT High to Medium level client interaction	LOW SKILL / OUTSOURCE TALENT Low (or no interaction) level client interaction
THAT COULD HAVE BEEN DONE:			

THURSDAY / Daily Activity	LEAD AGENT (ONLY) High level client interaction	HIGH VALUE ASSISTANT High to Medium level client interaction	LOW SKILL / OUTSOURCE TALENT Low (or no interaction) level client interaction
THAT COULD HAVE BEEN DONE:			

FRIDAY Daily Activity	LEAD AGENT (ONLY) High level client interaction	HIGH VALUE ASSISTANT High to Medium level client interaction	LOW SKILL / OUTSOURCE TALENT Low (or no interaction) level client interaction
THAT COULD HAVE BEEN DONE:			

SATURDAY Daily Activity	LEAD AGENT (ONLY) High level client interaction	HIGH VALUE ASSISTANT High to Medium level client interaction	LOW SKILL / OUTSOURCE TALENT Low (or no interaction) level client interaction
THAT COULD HAVE BEEN DONE:			

SUNDAY Daily Activity	LEAD AGENT (ONLY) High level client interaction	HIGH VALUE ASSISTANT High to Medium level client interaction	LOW SKILL / OUTSOURCE TALENT Low (or no interaction) level client interaction
THAT COULD HAVE BEEN DONE:			

WEEK 4 IN REVIEW / COMMENTS:

LIGHTBULB MOMENTS:

LIGHTBULB MOMENTS:

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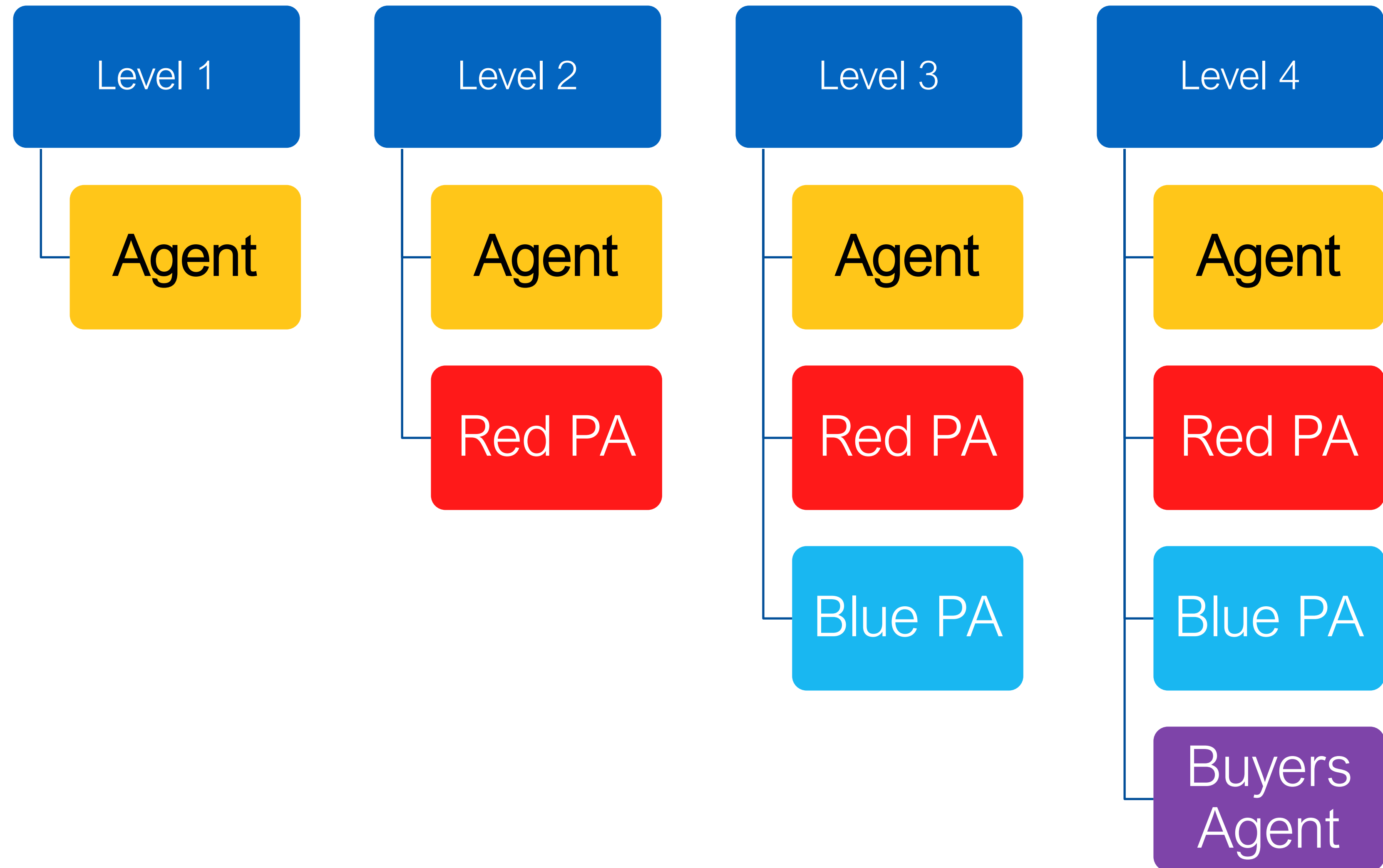
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LIST WITH ONE, SELL WITH ALL™

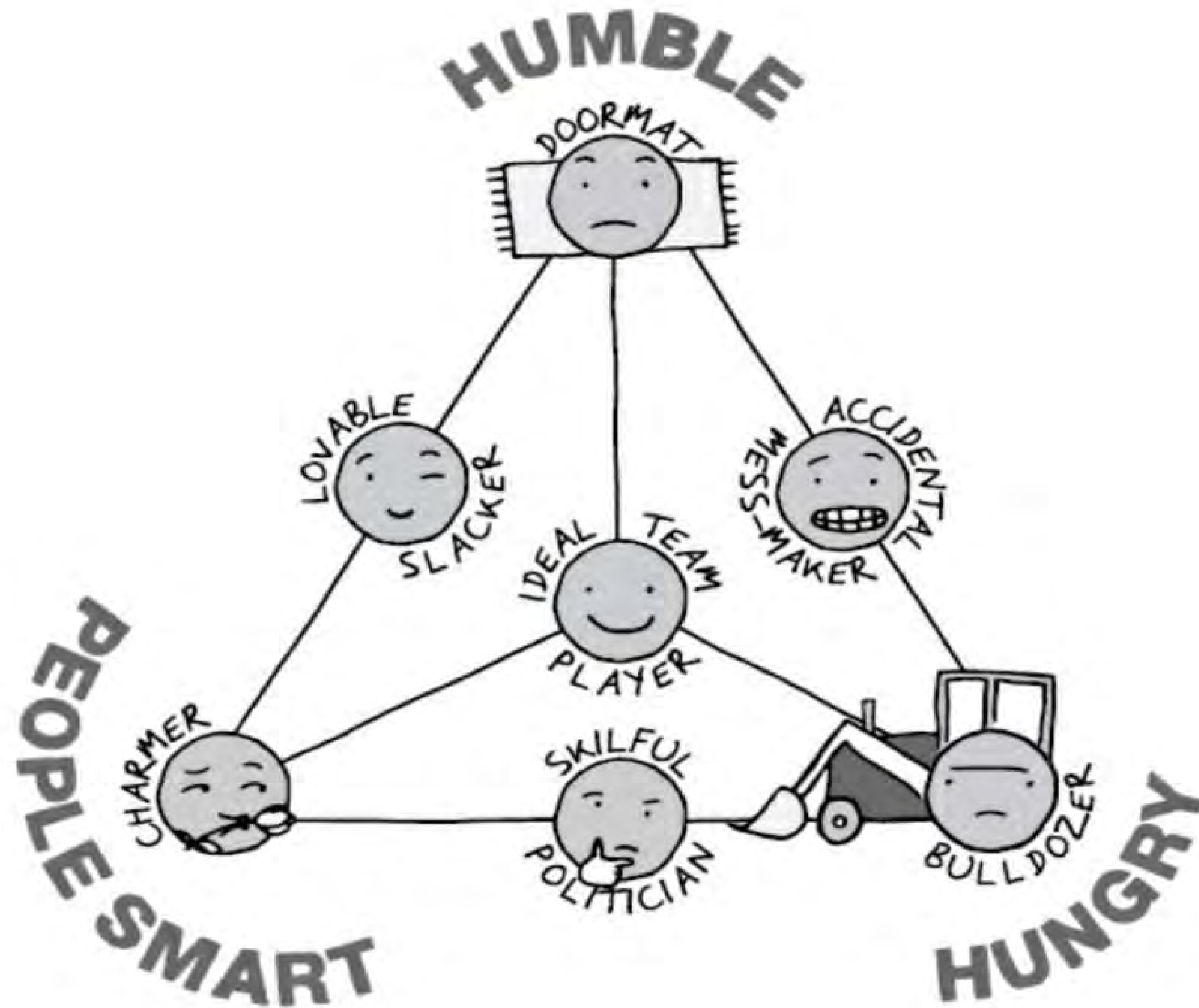
Real Estate Black Belt

BELT	TURNOVER	FOCUS
BLACK	\$2,000,000+	Team development
RED	\$1,000,000	Leverage
BLUE	\$750,000	Brand positioning
GREEN	\$500,000	Support
YELLOW	\$300,000	Chase
WHITE	\$150,000 or less	Learn

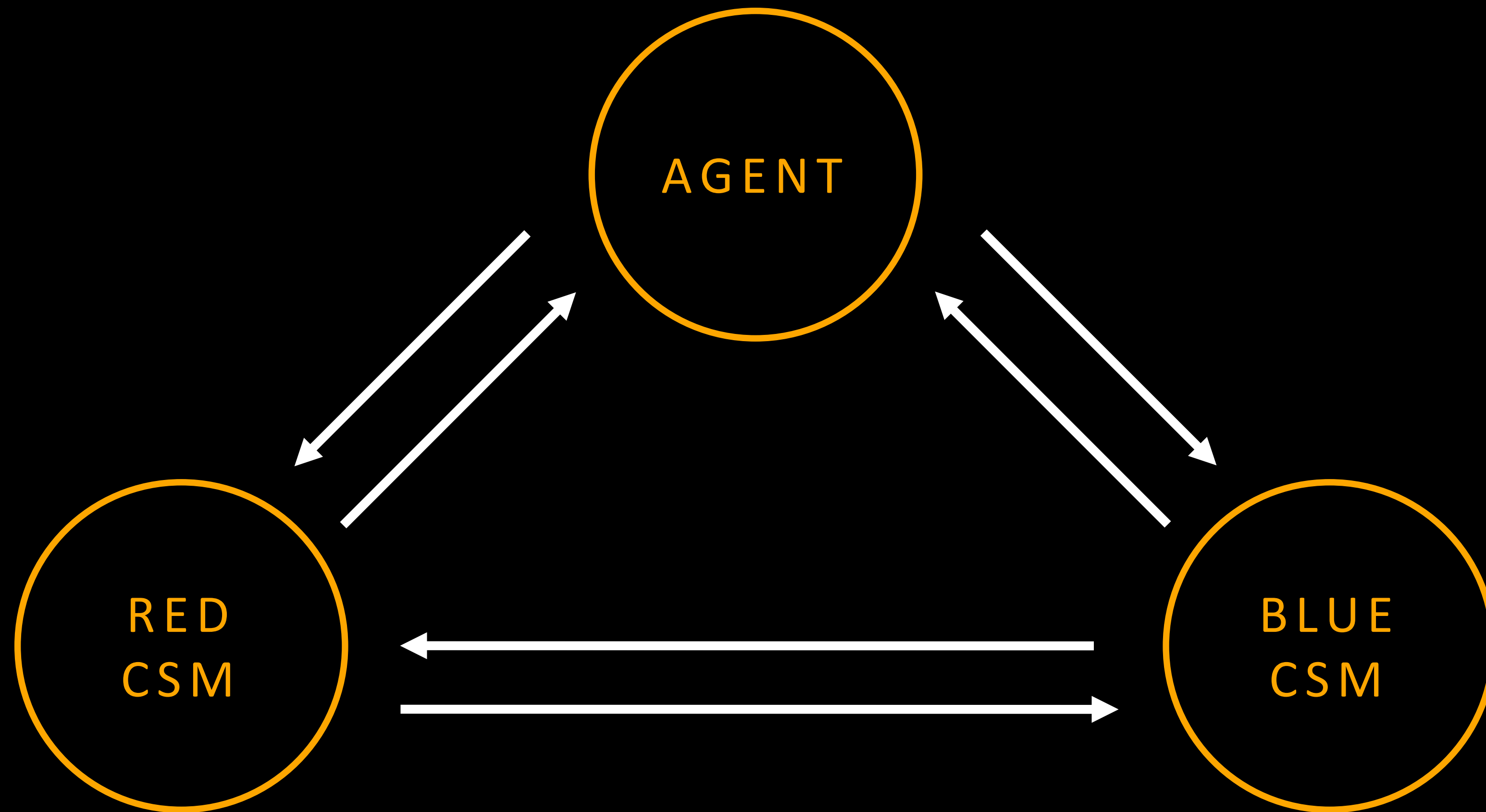
EBU









IDEAL TEAM PLAYER



ROLES OF YOUR EBU



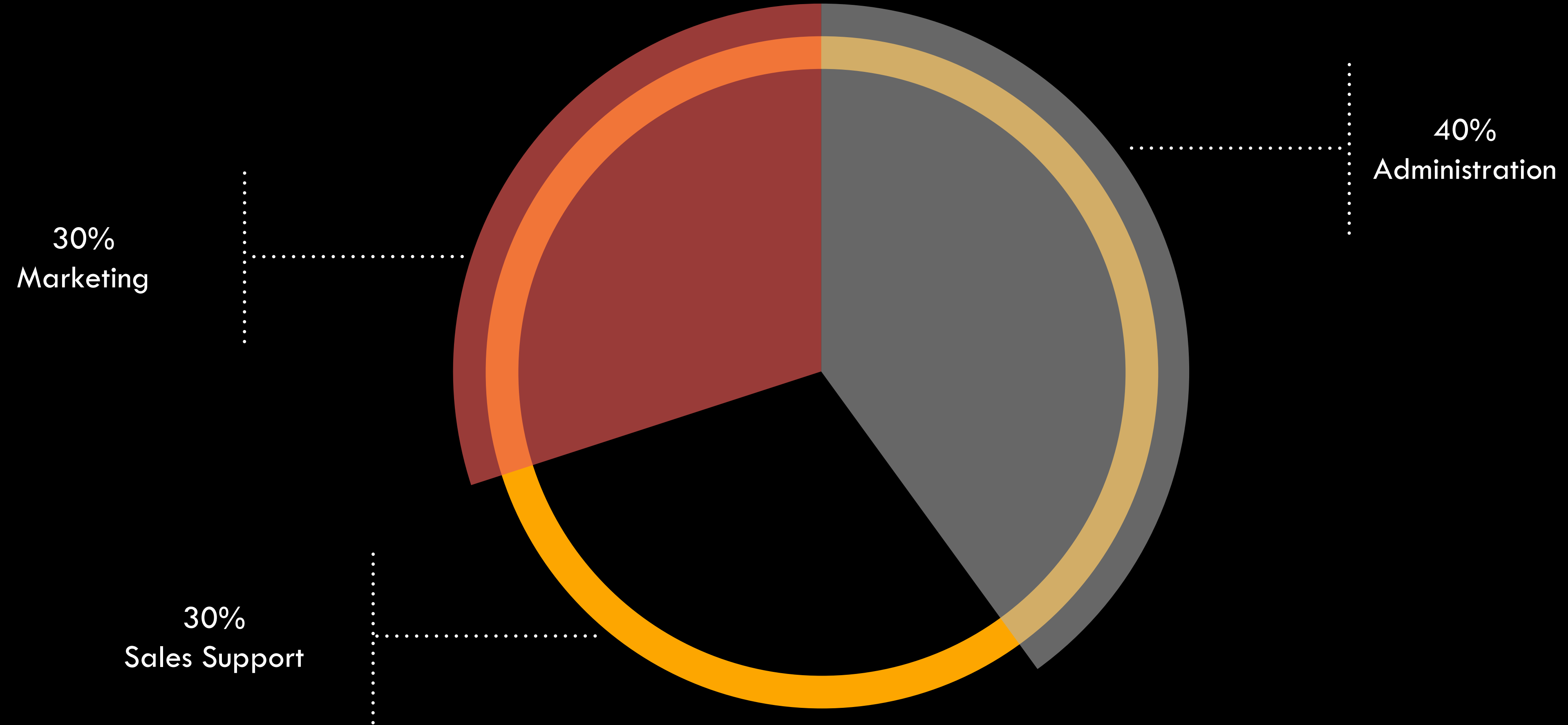
WHEN TO GROW

AGENT ONLY				3 - 4 SALES PER MONTH
AGENT + 1 CSM				5 - 6 SALES PER MONTH MAINLY ADMIN
AGENT + 2 CSM'S				7 - 8 SALES PER MONTH SPLIT BETWEEN ADMIN & SALES
AGENT + 3 CSM'S				10+ SALES PER MONTH SPLIT BETWEEN ADMIN, MARKETING & SALES

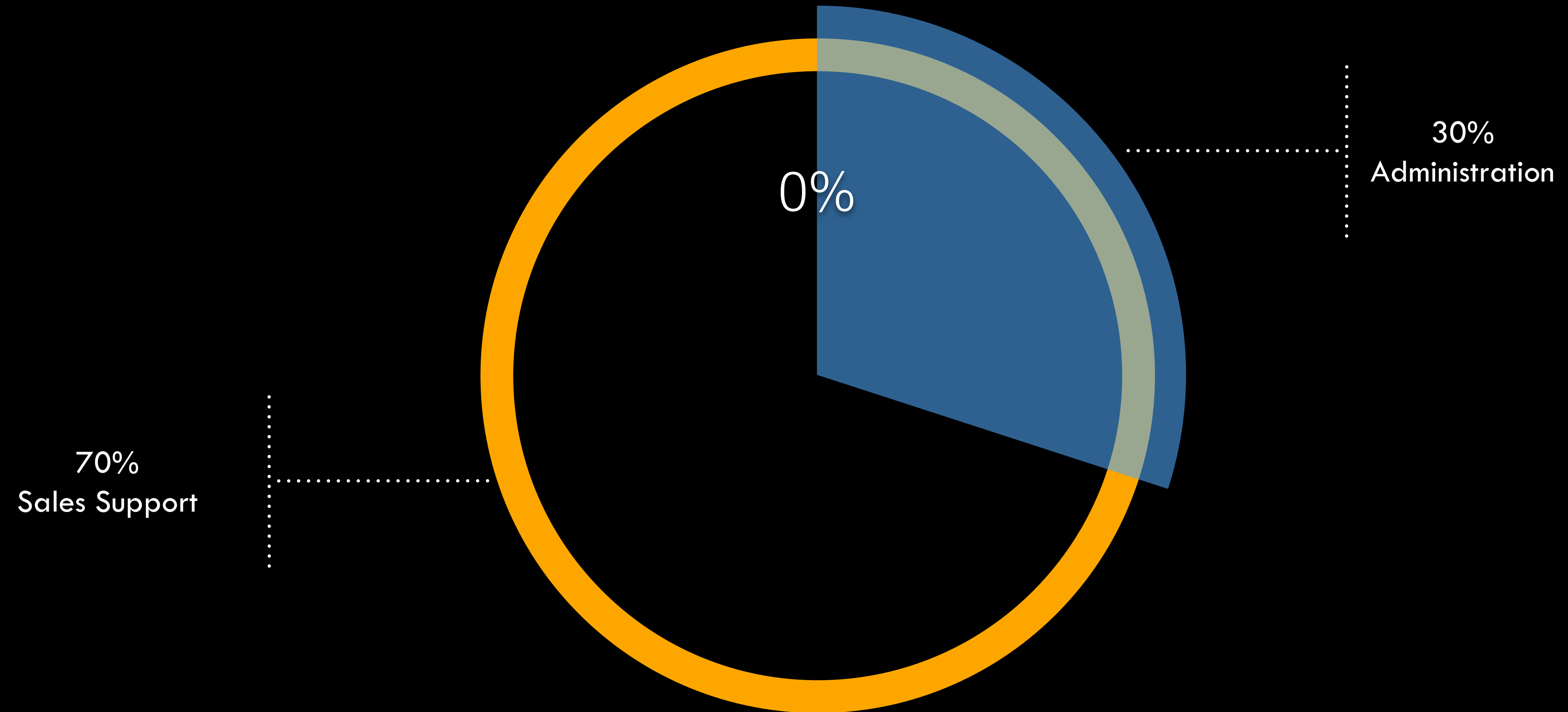
ROLES OF YOUR EBU

AGENT	RED (Mainly Admin) (You + 1) FT or PT	BLUE (Lead Gen/Buyers) (You + 2)
MA/List	Maintain files	Prospecting
Manage pipeline	Coordinate Diaries	OFI Callbacks
Expectation meetings	Execute marketing plan	OFI's
Vendor Management & Meetings	Check & respond to agent emails	Buyer Appointments
Negotiation	Book SWATS	Attend SWAT
Sell	Execute exchange/settlement process	B&P Inspections
OFI's	Admin Duties	Attend Valuations
Buyer Management	Support Agent	Pre settlement
OFI Callbacks	Operations Management for team	Drop Pre list kits
Networking	Cover holidays	Attend auctions
Prospecting	(\$45 - \$60K)	Manage exchange to settlement
Reserve meetings		Support Agent
Auctions		(\$60 - \$80K + incentives)
Team Management		
Business Planning		
Financial Planning		

RED ADMIN CSM



BLUE ASSOCIATE AGENTS



WIP MEETING AGENDA

DAILY

Yesterday Review?

Carry Forward?

Today's Appointments?

Prospecting calls

Buyer calls

KPI's/ Numbers

Exchanges/ Settlements

What Else?

ASAP

WIP MEETING AGENDA

WEEKLY

What new listings/ sales in our BDA?

Current Stock:

- Advertising/ Marketing activities
- Interest levels
- Offers
- Vendor expectations
- Price review
- Other

New Listings:

- Expectation meeting booked in?
- Advertising approved by vendor?
- OFI's scheduled?
- Pricing strategy is set?
- Contracts received?

What MA/Listing appointments upcoming?

What Prospecting?

- What type? What results?
- Numbers (how many prospecting calls? DL's etc.)
- Results from recent prospecting?

What team/agent marketing?

This week's auctions:

This week's settlements:

Team goals: Review + on or off track?

What's working well?

Ideas for improvement?

EXAMPLE INCENTIVE

ANNUAL GCI BONUS	ANNUAL BONUS	EXAMPLE	KPI'S
> \$950,000	1.5% of \$475,000	\$7,125.00	KPI 1 - 10x10x20's calls, door knock and letters every new listing and sold listing KPI 2 - Generate 10 market appraisals per month KPI 3 - 10 Buyer appointments per month KPI 4 – 20 new clients 'Opt in for Market report' per month
\$1,000,000	5.0% of \$25,000	\$1,250.00	
\$1,050,000	7.5% of \$25,000	\$1,875.00	
\$1,100,000	10% of \$25,000	\$2,500.00	
\$1,150,000	12.5% of \$25,000	\$3,125.00	
\$1,200,000	15% of \$25,000	\$3,750.00	
		\$19,625.00	

POTENTIAL INCOME

Base Salary	\$52,000.00	
Annual GCI Bonus	\$19,625.00	(if minimum target of \$950,000 achieved)
Quarterly Bonus 4 x \$1,000	\$4,000.00	(all 4 quarters achieved with the 9 KPIs)
Property Management bonus	\$1,000.00	
Oxygen Home Loans	\$1,000.00	
Lead Incentive Bonus	\$3,000.00	
\$80,625.00		

WHEN THE FOLLOWING CGI TARGETS ARE REACHED

\$150K GCI = \$1000

\$200K GCI = \$1000

\$250K GCI = \$1000 MORE

\$300K GCI = \$1000 MORE

AND SO ON, \$1000 MORE FOR EVERY \$50K THEREAFTER

That is, when team hits \$300k GCI, CSM earns an additional \$4,000 for the team component of the bonus structure.

In addition will be commission for self-generated listings: (this is on top of the above)

(10% of the amount of the agents split commission (~60% of every dollar)

e.g. on a \$1,000,000 sale at 2.2% commission

Total fee = \$20,000 plus GST

Agents cut = \$12,000 plus GST

CSM paid 10% of \$12,000 = \$1200

Team - Roles and Responsibilities

70% Commission Principal	25% Commission Senior Sales Executive	\$60,000 + 5% Commission Sales Executive	\$60,000 - \$70,000 + Bonus Campaign Manager	\$45,000 - \$55,000 + Bonus Sales Associate
Lead Agent	Lead Agent	Supporting Agent	Property administration	Email back all enquiries
Vendor management	Vendor management	Prospect	Manage campaigns, Sign-up to sale	Attend open homes/front door
List/sell	List/sell	List/sell	Compliance	OFI Area Sales compilation
Team growth/training	Prospect	OFI call-backs (over-flow)	Book stylist appointments	Prepare open home/auction kits
SWAT	SWAT	Market researcher	Confirm <u>all</u> daily meetings	Prepare and drop opinion of value letters
			Prepare agency agreements &	
Open Homes	Prepare proposals	Buyer management (Agent box)	marketing campaigns	Directionals before 7am on Sat/Wed
Buyer Appointments	Pipeline management	Pipeline management	Design & book all advertising	Trade inspections
Negotiation	Manage Trades	Manage Trades	Accounting and invoicing	Attend Pre-settlement inspections
	OFI call-backs	Call email enquiries	Social media (listed/solds)	Attend Building & pest inspections
	Area Sales	Cold calls	Social media (creative)	Street drops (ad-hoc)
			Contract management, review/proof	
	Draft email response for enquiries	Team testimonials - video or facebook	contract - saving to s drive, agent box	Drop Settlement gifts to clients (if not at pre-settlement)
	Open Homes	SWAT	Team marketing	Bi-Monthly magazine drop to cafes/shops
				Weekly Manly Daily drop to vendors (Friday COB)
	Buyer Appointments	Open Homes	OFI materials (excl. Area Sales)	
	Negotiation	Buyer Appointments	Quarterly newsletter	Monthly Belle lifestyle drop
		Negotiation		
			Book coffee van/flowers for auctions	Update listing kit documents
			Vendor reports - Thursdays	Prepare and drop listing kits/MA folders
			Liase with Solicitors re: Sales advices, exchange confirmation	Key log
			Book Pre-settlement inspections	Bid taking at auctions
			Exchange to settlement point of contact	
				Manage stock of gifts
				Collect flowers for auctions
				In-put private inspections to agent box
				In-put MA's into agent box and pipeline sheet

Red PA

- Team marketing
- Property marketing
- Social Media
- Client Gifts
- Photo shoots
- Diaries
- OFI Packs/ catering
- Prospecting Letters
- Ad copy
- Database Management
- Compliance
- Team management
- Online enquires
- Listing Appointments
- Exchanges
- Pest, Building & Valuation appts
- Listing Presentation Prep
- KPI monitoring
- Open Homes
- Solicitors & Contracts
- Vendor management/ reports

Blue PA

- Cold calling
- Door knocking
- Prospecting letter drops
- Open homes
- Appraisals/ listing appointments
- CMA's
- Pest, Building & Valuation appointments
- Thank you cards
- Pre-List kit drops
- Buyer management
- Pipeline management
- OFI/ Auction Invites

BUSINESS MANAGER

Provides exceptional service to Sam and Sam's clients. Assists Sam with the preparation of paperwork at the start of a campaign and database management

1. Database management – clients and properties
2. Prepare pre-appraisal, appraisal and listing kits
3. Prepare appraisal report
4. Send email introducing CSC and BM
5. Check property file is complete, scan and email contents to CSC team
6. Chase contracts if required
7. Intro call / email to vendor
8. Arrange team inspection
9. Set open times for the campaign
10. Complete sales particulars form
11. Confirm OFI times each week and send media reports to vendors
12. Arrange mid campaign and pre auction meetings
13. Co-ordinate e-blasts for Sam
14. Liaise with Sam's vendors on Sam's behalf
15. Sam's calendar management
16. Excludes team member diary management or contacting buyers

BUYER MANAGER

Provides exceptional service to buyers. Liaises with buyers, tenants and assists the listing agent with keeping the vendors up to date with campaign progress

1. Drop off pre-appraisal kits and appraisal reports
2. Make time with tenants to visit property and review (with CSC)
3. Call tenants to advise of plan and discuss any queries they may have
4. Collect keys for the property
5. Buyer call backs
6. Develop and manage a premium level buyer matrix/data base
7. Draft weekly vendor reports
8. Conduct private inspections
9. Coordinate pre-settlement inspections
10. Generate appraisals from OFI's & data base
11. Generate listings
12. World class open for inspections

CADET

Assists the team wherever possible with a variety of tasks.

1. Prepare OFI pack and conduct OFIs
2. Buyer call backs
3. Attend building/pest inspections
4. Conduct private inspections
5. Attend bank valuations
6. Prepare auction kits and auction bags
7. Conduct all cold prospecting tasks
8. Prepare pre-appraisal, appraisal and listing kits and assists Liz
9. Co-ordinate texts to buyers
10. Install forthcoming auction boards
11. Team Rig prospecting