



Momentum[®]
MAXIMUM RESULTS

MASTER TEAM BUILDER
*Building & Retaining
a Highly Proficient Team*

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As a RE/MAX Affiliate, you're a member of the most professional, most productive real estate network in the world.

There are many decisions you must make each and every day to run a successful business. The Momentum program provides basic information to help you. Please note: The Momentum program and materials are designed as a resource to reference. The suggestions made within are not mandatory.

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MUTUAL EXPECTATIONS

Conflict arises only when expectations differ!

WHAT YOU CAN EXPECT

1. "A" proven method for building and retaining a Highly Proficient Team
2. Content delivered with passion & conviction
3. Honest, stimulating conversation designed to make you think
4. Life-changing concepts (when implemented)
5. Two 15-minute breaks plus a 30-minute lunch

WHAT'S EXPECTED FROM YOU

1. An open mind and **willingness** to learn
2. Productive **participation**
3. 6 hours of **complete** focus (Cell phones off. I promise you won't die!)
4. Timely return from breaks and lunch
5. Action (the goal of training)

SECTION 1: Perspective

There are two basic games in real estate:



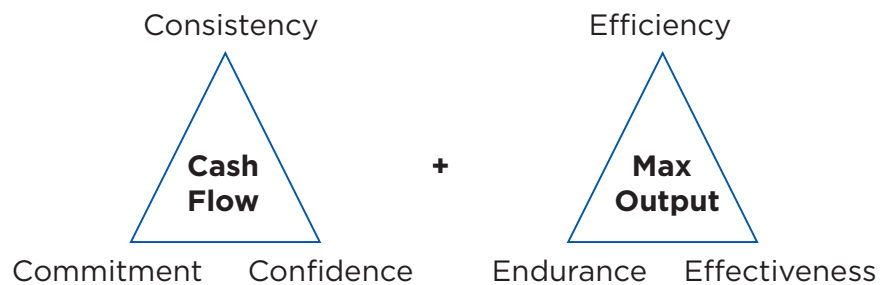
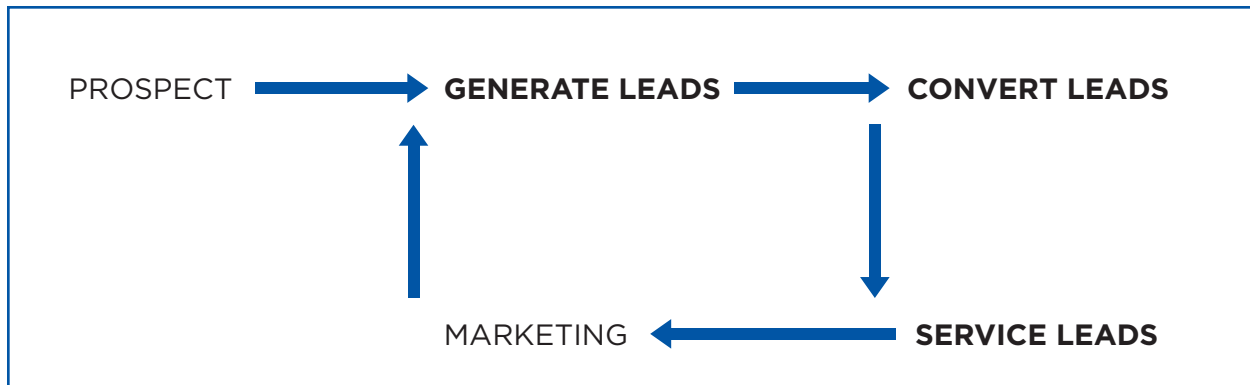
Sales Game



Business Game

THE REAL ESTATE SALES GAME

The real estate sales game revolves around three mandatory disciplines!



AS A SALESPERSON, YOU HAVE

THREE DISCIPLINES:

1. Lead Generation (prospecting & marketing)
2. Lead Conversion (buyers & sellers)
3. Servicing (client care administration)

TWO APPROACHES:

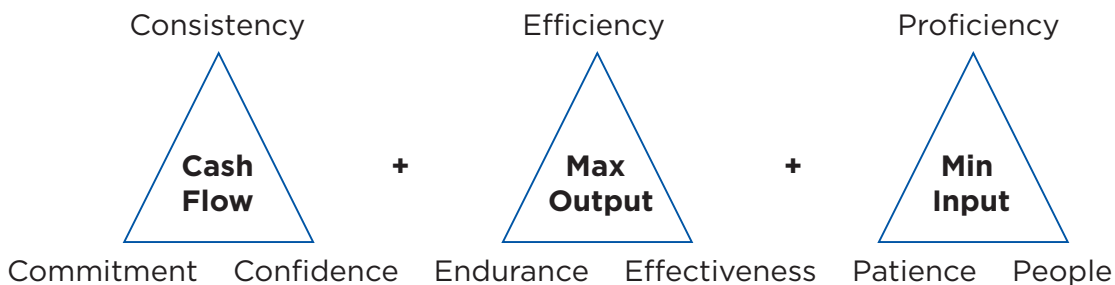
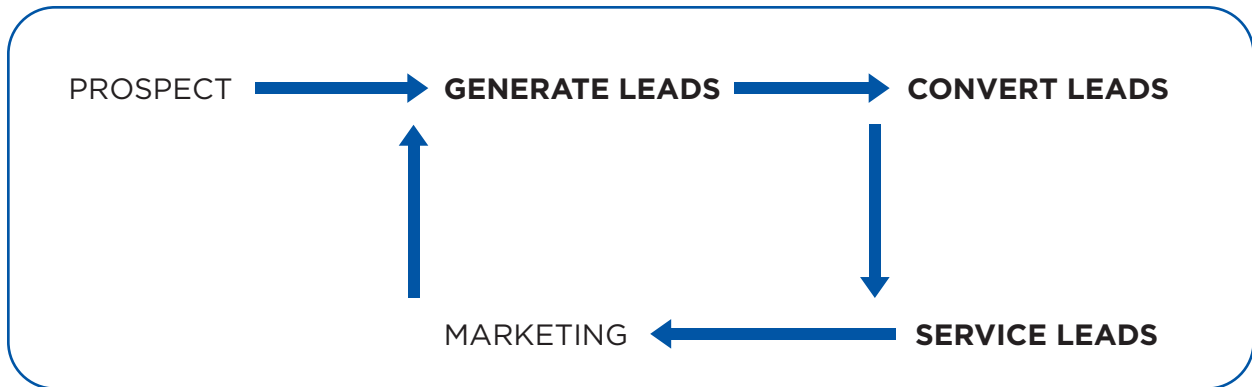
1. Typical (spontaneous & reactive – stays in comfort zone – easy & convenient)
2. Momentum Approach (intentional & proactive – welcomes discomfort – willing to suffer)

TWO AMBITIONS:

1. Consistently Active (sporadically vital – default mode)
2. Consistently Vital (sporadically dollar-productive)

THE REAL ESTATE SALES BUSINESS GAME

The real estate business game revolves around six mandatory disciplines!



AS AN ENTREPRENEUR, YOU HAVE

SIX DISCIPLINES:

1. Lead Generation (prospecting & marketing)
2. Lead Conversion (buyers & sellers)
3. Servicing (client care administration)
4. Leading (core ideology)
5. Planning (G.P.S.)
6. Staffing (talent)

TWO APPROACHES:

1. Typical (spontaneous & reactive – stays in comfort zone – easy & convenient)
2. Momentum Approach (intentional & proactive – welcomes discomfort – willing to suffer)

FIVE AMBITIONS:

1. Consistently dollar-productive (sporadically H-B-U)
2. Consistently H-B-U (Highest and Best Use)
3. Consistently A-M-E (Activity Most Enjoyed)
4. Consistently Away (go & grow)
5. World Domination

FIRST THINGS FIRST

You must choose an appropriate career path!

There are four paths in real estate sales:

1. Typical Salesperson (remains in Phase 1)
2. Momentum Salesperson (progresses from Phase 1 to Phase 2)
3. Typical Entrepreneur (moves from Phase 1 to Phase 3, skipping Phase 2)
4. **Momentum Entrepreneur (progresses from Phase 2 to Phase 3)**

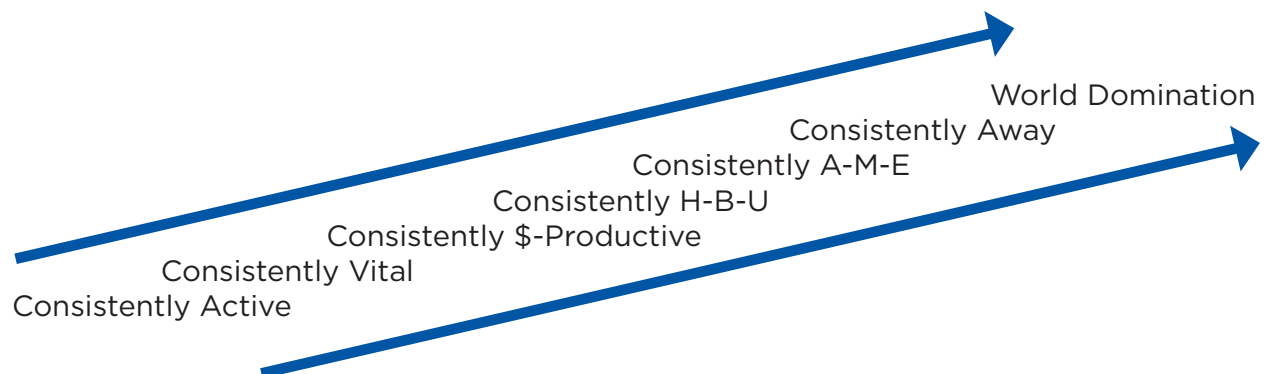
First you must establish YOUR approach ...

1. **Typical** (spontaneous & reactive - stays in comfort zone - easy & convenient)
2. **Momentum Approach** (intentional & proactive - welcomes discomfort - willing to suffer)

...then you must determine your role:

1. **Salesperson** (job - "Me" - rich)
2. **Entrepreneur** (business - "We" - wealthy)

Your trek depends on your ambition!



NOTE:

Anything **beyond** consistently vital **requires** becoming an **entrepreneur!**

MOVING FROM ACTIVE TO VITAL

Becoming consistently vital is the key rung on the ambition ladder!

Building a Highly Proficient Team **requires** that you **first** move from consistently **active** to consistently **vital**!

Most teams **underperform** because they are **not** consistently **vital**. (They are consistently “busy” rather than consistently “productive”.)

WARNING: If you don’t first become efficient yourself, when you build a team, your inefficiencies will only expand.

In most cases, Lead Agents hire too **soon**. They move from Phase 1 (Cash Flow) to Phase 3 (Minimum Input), completely skipping Phase 2 (Maximum Output).

Moving from active to vital involves three basic steps!

ARE YOU MOVING TOWARD SOMETHING OR JUST MOVING AROUND?

Maximizing Operational Output:

Step 1: Record **ALL** current career **activities**. (This will take at least two weeks. Be accountable for **every** minute.)

Step 2: Distinguish between “vital” and “irrelevant” activities. (Analyze **each** activity to make sure it’s absolutely necessary for progressing from find to close and increasing profitability.)

Step 3: Create **two** progressive **Vital Activities** checklists. (One for sellers and another for buyers.)

Hint: **All** activities on the checklists should be categorized as a lead generation, lead conversion or servicing activity.

VITAL ACTIVITIES CHECKLISTS BRING ORDER TO THE CHAOS!

NOTE: **Only** when you are consistently **vital** should you consider adding people!

A MOMENTUM EXAMPLE

When building checklists, always begin with the key responsibilities.

THE 7 VITAL LISTING RESPONSIBILITIES

1. Lead Generation (finding)
2. Lead Conversion (attracting)
3. Administrative Preparation
4. Marketing and Exposure
5. Presenting and Negotiating
6. Closing Preparation
7. Post-Closing Activities

THE 7 VITAL BUYER RESPONSIBILITIES

1. Lead Generation (finding)
2. Lead Conversion (attracting)
3. Administrative Preparation
4. Showing
5. Writing and Negotiating
6. Closing Preparation
7. Post-Closing Activities

47 VITAL LISTING ACTIVITIES

Vital activities checklists protect and direct!

LEAD GENERATION

- 1. Finding Sellers (face-to-face, phone calls, mail, email)**
 - a. FSBOs
 - b. Expired and terminated listings
 - c. Traditional and social networks
 - d. Just-sold notifications
 - e. Farming

LEAD CONVERSION

- 2. Ask Pre-Listing Questions**
- 3. Assemble Pricing Tools**
- 4. Confirm Appointment**
- 5. Prepare Listing Agreement**
- 6. Get on the Listing Channel**
- 7. Arrive on Time**
- 8. Have Listing Conversation**
 - a. Set tone
 - b. Uncover needs
 - c. Prioritize needs
 - d. Transition to pricing tools
 - e. Review pricing information
 - f. Agree on appropriate price entry point
 - g. Transition to roles and expectations
 - Review my role
 - Review your role
 - h. Agree on roles and expectations
 - i. Close in on listing agreement
 - j. Explain IABS, listing agreement and notices
 - k. Review staging plan
- 9. Sign Listing Agreement**

47 VITAL LISTING ACTIVITIES (continued)

ADMINISTRATIVE PREPARATION

10. Measure Rooms and Complete MLS Input Sheet
11. Take Interior/Exterior Pictures
12. Place Sign and Lockbox
13. Mail Thank-You Letter
14. Create Listing File
15. Contact Showing Service
16. Deliver Listing Agreement, MLS Sheet and Notices to Office
17. Place Client in Database Management/Touch Program
18. Obtain Loan Payoff

MARKETING & EXPOSURE

19. Place in MLS and on Other Websites
20. Look up Just-Listed Phone Numbers and Addresses
21. Order Just-Listed Cards
22. Request/Create Home Flyers
23. Door Knock 25 Closest Neighbors
24. Call 50 Neighbors
25. Mail 200 Just-Listed Cards
26. Email Home Flyer to Area Agents
27. Solicit Feedback from Showing Agents
28. Prepare Weekly Update Sheet
29. Call Seller with Weekly Update(s)

PRESENTING & NEGOTIATING

30. Proactively Solicit Multiple Offers
31. Present Offer(s)/Counteroffer(s)
32. Change Status in MLS and on Other Websites
33. Deliver Accepted Contract to Office
34. Negotiate Repairs
35. Copy Repair Invoices

47 VITAL LISTING ACTIVITIES (continued)

CLOSING PREPARATION

36. Schedule Closing
37. Communicate with Seller
38. Communicate with Selling Agent
39. Review Title Commitment
40. Review HUD Statement
41. Attend Closing

POST-CLOSING ACTIVITIES

42. Mail Customer Survey
43. Change Status in MLS and Remove from Websites
44. Order Just-Sold Cards
45. Door Knock 25 Closest Neighbors
46. Call 50 Neighbors
47. Mail 200 Just-Sold Cards

NOTE:

Systems are nothing more than **documented** routines. (**Artificial** habits!)

47 VITAL BUYER ACTIVITIES

Performing any activity out of order weakens the process!

LEAD GENERATION

- 1. Finding Buyers (face-to-face, phone calls, mail, email)**
 - a. Network & Farming
 - b. Open Houses
 - c. Yard Signs & Home Ads
 - d. Internet (website, Craigslist, social marketing, LeadStreet)
 - e. Just Listed

LEAD CONVERSION

- 2. Meet in Office (meeting #1)**
- 3. Move to Conference Room**
- 4. Get on the Selling Channel**
- 5. Have Buyer Conversation**
 - a. Build rapport
 - b. Set the tone
 - c. Uncover needs and wants
 - d. Prioritize wants
 - e. Verify motivation
 - f. Check financial ability
 - g. Transition to roles and expectations
 - Review my role
 - Review your role
 - h. Agree on roles and expectations
 - i. Close in on a working relationship
 - Review IABS and Buyer Representation Agreement
 - Give buyers guide and contract
 - Set date for a second meeting
- 6. Sign Buyer Representation Agreement**

47 VITAL BUYER ACTIVITIES (continued)

ADMINISTRATIVE PREPARATION

7. Mail Thank-You Letter
8. Create Buyer File
9. Verify Price Range with Lender
10. Verify Price Ceiling with Buyer
11. Place Client in Database Management/Touch Program
12. Search MLS and FSBO Inventories
13. Call Listing Agent to Verify Availability
14. Prepare Showing Packages
15. Book Showings

SHOWING

16. Meet in the Office (meeting #2)
17. Review Buyer Needs
18. Explain Showing Packages
19. Answer Questions
20. Get in the Car
21. Tour Homes
22. Finalize an Offer

WRITING & NEGOTIATING

23. Send Offer to Listing Agent
24. Negotiate Offer to Acceptance
25. Open Title/Deliver Earnest Money
26. Deliver Signed Contract to Office
27. Schedule Home Inspections
28. Check Home Insurability
29. Communicate with Buyer
30. Communicate with Listing Agent
31. Review Inspection Report with Buyer
32. Send Amended Contract to Listing Agent
33. Negotiate Repairs

47 VITAL BUYER ACTIVITIES (continued)

CLOSING PREPARATION

34. Schedule Closing
35. Communicate with Buyer
36. Communicate with Lender
37. Review Title Policy
38. Review HUD Statement
39. Attend Closing

POST-CLOSING ACTIVITIES

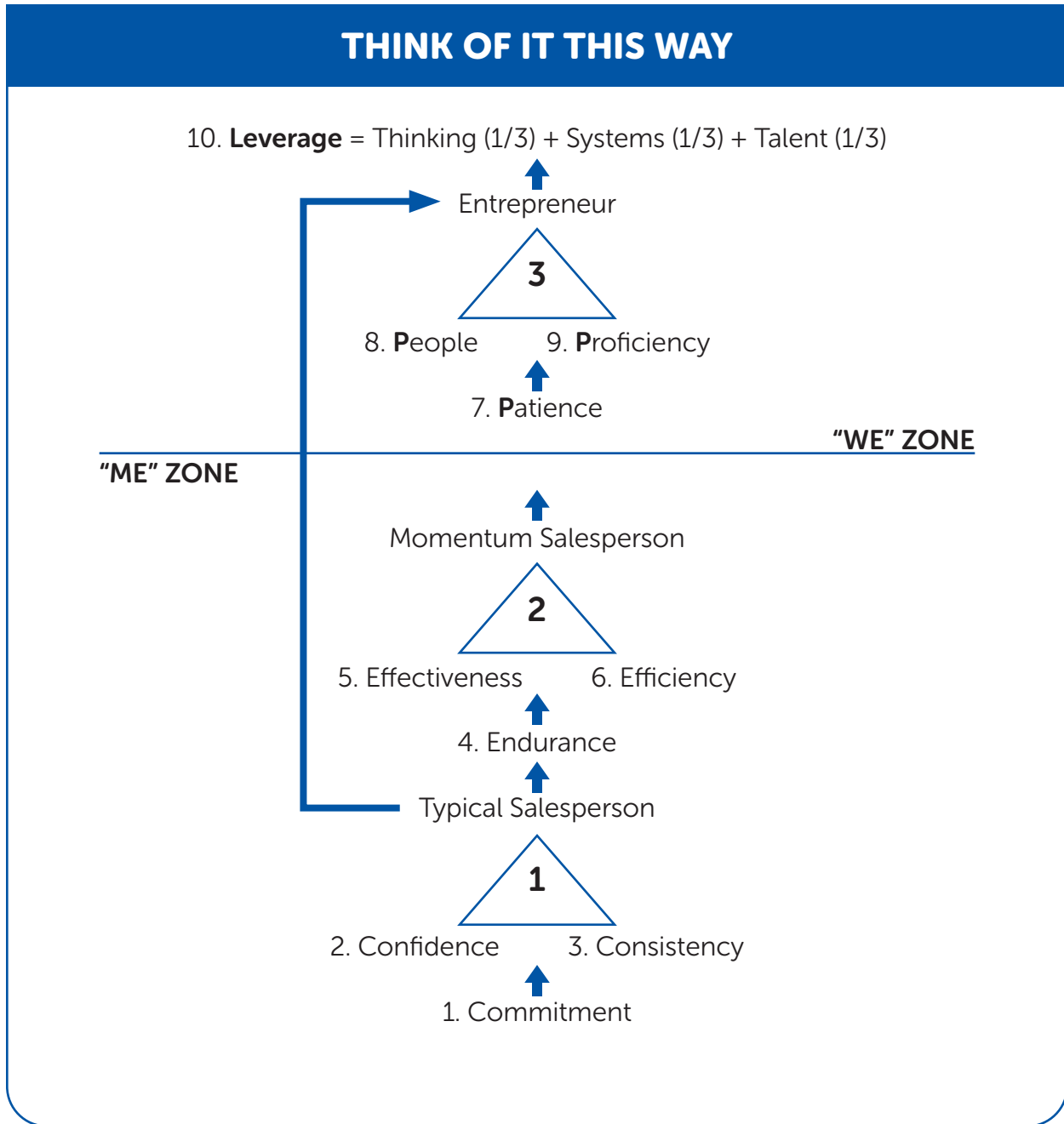
40. Mail Customer Survey
41. Look up Just-Sold Phone Numbers and Addresses
42. Order Just-Sold Cards
43. Door Knock 25 Closest Neighbors
44. Call 50 Neighbors
45. Mail 200 Just-Sold Cards
46. Make 7-Day Follow-Up Call to Buyer
47. Make 30-Day Follow-Up Call to Buyer

WARNING:

Delegation is **unattainable** independent of **systems!**

MOVING FROM VITAL TO DOLLAR-PRODUCTIVE

Proficiency is nothing more than scaled efficiency!



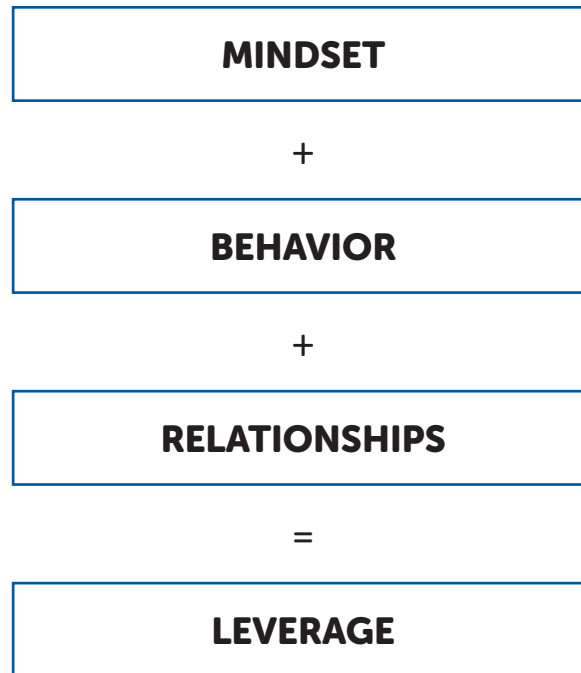
NOTE:

The path to becoming a Momentum Entrepreneur goes **through** being a Momentum Salesperson!

LEVERAGE IS THE KEY TO A THRIVING BUSINESS

Leverage is not just a “people” thing!

Moving from Salesperson to Entrepreneur typically requires a change in:



As a Momentum Entrepreneur, you must...

1. **Think** like an Momentum Entrepreneur
2. Establish duplicable and delegable **systems**
3. Attract **talent** willing and able to drive your systems

Becoming a Momentum Entrepreneur requires an **additional** set of skills!

EXPANDING YOUR SKILL SET

Entrepreneurs must master three additional disciplines!

Because you have **chosen** to expand **beyond** the “Me” zone, disciplines that were once optional now become **mandatory**.

Operational Disciplines:

1. Lead Generation
2. Lead Conversion
3. Servicing

Entrepreneurial Disciplines:

1. Leading
2. Planning
3. Staffing

EACH ENTREPRENEURIAL DISCIPLINE CONTAINS FIVE ENTREPRENEURIAL RESPONSIBILITIES

Leading

1. Mission
2. Vision
3. Values
4. Beliefs
5. Expectations

Planning

1. Goals
2. Financial Model
3. Operational Model
4. Organizational Model
5. Performance Standards

Staffing

1. Assessing
2. Hiring
3. Developing
4. Rewarding
5. Retaining

Since most think teambuilding is **only** about hiring, the other **14** entrepreneurial responsibilities often get **ignored**.

WARNING: Ignoring the entrepreneurial responsibilities is largely **why** most teams **underperform** and fail to reach their potential!

To reach your true business **potential**, you must be **willing** and able to orchestrate **both** the operational and entrepreneurial disciplines effectively and efficiently!

THINK OF IT THIS WAY

Momentum Entrepreneurs:

Provide direction and clarity
Unite the team around a cause
Rally the team around a goal
Establish behavioral standards

Delegate instead of abdicate
Develop team members
Hold team members accountable
Challenge the team to improve

The **remainder** of this class will focus on the **15 entrepreneurial** responsibilities.

SECTION 1 WRAP-UP

AHA'S:

ACTION ITEMS:

- 1. Choose an appropriate career path based on your primary ambition.**
- 2. Prepare a Vital Activities Checklist for your listing division.** (Include only the activities absolutely necessary for progressing from find to close with sellers.)
- 3. Prepare a Vital Activities Checklist for your buyer division.** (Include only the activities absolutely necessary for progressing from find to close with buyers.)
- 4. Determine what most needs changing in your business** (thinking, behavior, or relationships).

YOUR PRIORITY:

SECTION 2: Leading

**Transformed behavior without transformed ideology
results in short-term change and long-term frustration!**

THE LEADING DISCIPLINE

Adding people to a business that lacks clarity is detrimental!

The key to building a Highly Proficient Team is **effective leadership**.

The Lead Agent must serve as the **primary** leader and Director of Vision.

WARNING: The **outcomes** your team experiences are a **direct** result of **your** leadership!

To **intentionally** build your **leadership** skills, develop the habit of **asking** yourself the following question at the end of each periodic evaluation period:

How did **my** leadership affect our outcome this week (month, quarter, year)?

Above all, you **MUST** become and remain a leader **worth** following!

Lead Agents worth following set the **tone** for their team, which begins by creating **clarity** via a meaningful core **ideology**.

A core ideology defines:

1. Who you are
2. Who you aspire to be
3. What you stand for
4. What you believe
5. How you behave

CORE IDEOLOGY

A Highly Proficient Team operates with one mind and purpose!

A core **ideology** exists to provide directional and behavioral **clarity** for the team.

The five Leading responsibilities include:

1. Mission - provides **purpose**
 2. Vision - provides **inspiration**
 3. Values - determine **approach**
 4. Beliefs - determine **attitude**
 5. Expectations - determine **conduct**
- } = **Team Ideology**

It's up to the Lead Agent to create a **culture** the **entire** team can **rally** around!

Do not underestimate the **power** of creating a core **ideology**! Numerous thriving companies point to their **ideology** as the main **reason** for their success.

**THE IDEOLOGY MUST EXTEND BEYOND
THE LEAD AGENT TO THE TEAM!**

Culture Test:

Can **all** team members recite the team **ideology** with confidence **and** without hesitation?

WARNING: Most members of real estate teams are **clueless** and/or indifferent about the core ideology of their team (primarily because one does **not** exist).

Everyone on the team is **expected** to know and **follow** the team ideology.

No one **transcends** the ideology and there can be no **factional** motives within the team.

HINT: To ensure team members remain focused on the ideology, **consistently** refer to it in **weekly** focus meetings and **accountability** sessions.

REMEMBER:

It is **impossible** to **over**-communicate your ideology!

1. FORMULATE A TEAM MISSION

Mission provides meaning and purpose for the team!

Life Mission = to live a successful life



Career Mission = to produce the time and money required by my successful life



Career Choice = real estate sales



Real estate sales is a service career



Service - the act of helping someone; assistance or advice given to customers



Real estate sales customers = buyers & sellers



What do buyers and sellers want? _____

Current Team Mission: _____

Although the mission of your career is money inspired; the mission of your team must be service inspired.

WARNING: If an attitude of service doesn't exist, there will be **no** money!

THINK OF IT THIS WAY

Life Mission = to live successfully



Career Mission = to earn successfully



Team Mission = to serve successfully

**A SELF-CENTERED MISSION VIOLATES THE
CORE PREMISE OF A SERVICE BUSINESS!**

2. CREATE A TEAM VISION

Vision provides the inspiration needed to weather adversarial storms!

Momentum Entrepreneurs are **vision-centric**!



Vision-centric = leading toward a **specific** vision.

It is impossible to **retain** talented people without a meaningful **vision**!

Teams that lack **motivation** typically lack a **meaningful** vision.

Your team must **rally** around the vision because **they** are the “vision casters” (i.e. the ones responsible for bringing it to life; if they **see** it, they will **be** it).

There is a direct **correlation** between **discipline** and vision. The level of one’s discipline is directly related to the **clarity** of one’s vision!

Without a **meaningful** “why” (vision), team tasks quickly turn into team **“chores.”**

HINT: To help your team **enthusiastically** pursue their roles, you should **attach** all office tasks to a meaningful and inspiring **vision**.

People who are **passionate** about what they aspire to build, create, and/or become do not feel **burdened** by the tasks required to convert the vision to reality.

Make sure your vision is:

1. Appropriate to the mission and **easily** understood.
2. **Motivating** and exciting. It should **move** you and others into action!

Current Team Vision:

3. ESTABLISH TEAM VALUES

Core values dictate the team's approach!

Preferred **behavior** begins with a **clear** set of core **values**!

Core values represent **nonnegotiable** principles; therefore, behavior that **violates** the core values of the team should not be tolerated.

Staff members who don't fully **demonstrate** the core values of the team should be deemed **out of culture**.

WARNING: "Talk" is cheap! To be considered a **"core"** value, it must **consistently** show up in the **entire** team's **behavior**.

Everyone on the team must have a **CLEAR** understanding of the core **values** along with the accompanying **behavioral** expectations of each value.

Core values **trump** feelings and **override** emotions (i.e. even though you may not feel like doing what's right, your core **values** will always supersede and **provoke** the action required).

Since you will hire to your core values, you must be crystal **clear** on the ones to which your team subscribes. (Team members who champion your values strengthen your **culture**.)

HINT: Share your core values with **everyone**, as doing so will **attract** those with similar values and **detract** those with dissimilar values.

Make sure your core values are:

1. No longer than a few words or short sentences
2. Meaningful and easily remembered
3. **Modeled** on a daily basis

Current Team Values:

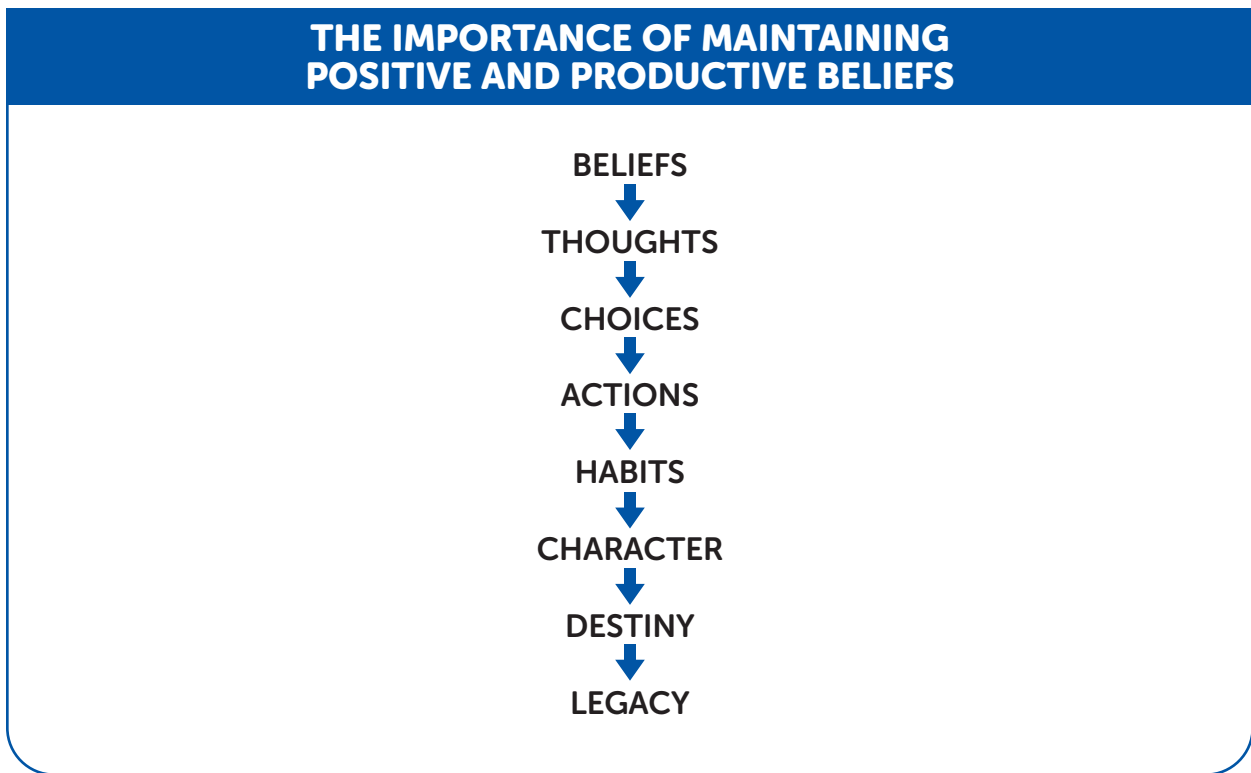
4. ESTABLISH TEAM BELIEFS

Beliefs shape the attitude of the team!

Your beliefs must **support** your vision! (Based on your **vision**, what must the team **believe**?)

Once you have identified the necessary beliefs for achieving your vision, they must be **taught** and **reinforced** until **behaviorally** internalized by the team.

WARNING: Beliefs serve as behavioral **filters** that, when combined together, shape the team's **character** and determine the team's **legacy**.



Current Team Beliefs:

5. ESTABLISH TEAM EXPECTATIONS

Expectations determine team conduct!

Behavioral expectations **must** be established to ensure proper **conduct** on the team.

Expectations provide a basic **roadmap** for how the team will **behave**.

Consistent team conduct is impossible without an established set of **expectations**.

Every team member is held **accountable** to the **same** set of expectations.

No team member **transcends** the expectations (not even the Lead Agent).

WARNING: Expectations **without** consequences quickly turn into **suggestions**.

Expectations are designed to **eliminate** gray areas and conflict by informing team members of **exactly** what is expected of them.

Don't let one member's performance **lower** your expectations of the **entire** team.

You must consistently **challenge** the team to **stretch** or else YOU will shrink!

HINT: Surround yourself with people who are **motivated** to meet and **exceed** team expectations. (Create an "**and then some**" culture; not a "just enough" one.)

Current Team Expectations:

A MOMENTUM EXAMPLE

TEAM MISSION

To **help** buyers and sellers make informed, intelligent **decisions!**

TEAM VISION

An **intentional** and **proactive** team of **specialists** who are intensely **focused** on creating life-long **advocates** by **systematically** supplying buyers and sellers with **all** the **appropriate** information needed to make **wise** financial **decisions!**

Rally the Team Via an Expanded Team Vision:

We aspire to be:

- The most **profitable** real estate team in the city.
- A high-minded, learning-based team **committed** to achieving our goals.
- A Highly Proficient Team providing **world-class** service and **value** in a positive and professional manner.
- A **client-centered** team structured around an intentional and proactive sales business system that is irresistible and irreplaceable to our clients.
- A culture of positive values and unlimited beliefs where team members are challenged and encouraged to reach their **potential**.
- Focused on satisfying the needs of our **clients**.
- A culture that promotes **better** before bigger.
- An open-book team that **shares** profits with those who stimulate growth.
- Surrounded by loyal members who **fully** support the direction of the team.

A MOMENTUM EXAMPLE

TEAM VALUES

We value being **Intentional**, **Proactive** and **Discontent**

Intentional – We are **purposeful** in everything we do!

To remain **intentional** we:

1. Identify specific goals
2. Create specific plans
3. Establish specific performance standards

Proactive – We are productively active on an **hourly** basis!

To remain **proactive** we:

1. Implement only **vital** activities (activities required by the goal and identified on the plan)
2. Are accountable to specific and pre-determined performance standards
3. Reflect and learn the lessons provided by each experience

Discontent – We constantly strive to **improve!**

To remain **discontent** we:

1. Investigate new ways to become more effective and efficient
2. Evaluate new ways against old
3. Advocate new ways that prove to be better

TEAM BELIEFS

1. There is no growth without discomfort!
2. We live in a world of abundance!
3. The market does not and will not determine our income!
4. Our only limit is time!
5. Success stems from duplicable processes & systems!
6. It is unacceptable for our business to earn \$0!
7. If we help enough people get what they want, we will get what we want!
8. Focus is the key to success!
9. It's win-win or no deal!
10. Cost is an issue only in the absence of value!

A MOMENTUM EXAMPLE

TEAM EXPECTATIONS

Behavior we expect from ALL team members:

1. **Show up!** – Come to work on time, focused, and prepared to serve! (Are you mentally here?)
2. **Be vital!** – Avoid all distractions and eliminate all activities that do not directly support the team mission and vision. (What is your know, do, and have?)
3. **Do your best!** – Give 100% every day. (Where did you show an “and then some” effort?)
4. **Improve it!** – Challenge, evaluate, and improve everything we do. (What have you done to intentionally improve your position and the team?)
5. **It’s your pleasure!** – Approach all clients, prospects, visitors, and tasks with an “it’s my pleasure” attitude. (What have you done to exceed someone’s expectations?)
6. **Support each other!** – Help your fellow team members regardless of job description or responsibility. (What have you done to support a teammate?)
7. **Walk our talk!** – Be a great role model by demonstrating the team values and beliefs. (Where have you demonstrated our values and beliefs?)
8. **Be glad you did!** – Have a daily goal, follow a daily plan, be productively active, reflect and learn. (Are you better at the end of every day?)
9. **Protect our environment!** – Squash all gossip, negativity and drama! (What have you done to protect the integrity of the culture?)
10. **I-D-R!** – Do the right thing without being told, when you don’t feel like it, and when no one else is watching. (Where have you demonstrated I-D-R behavior?)

When in doubt, follow the mission. **Always** behave in a way that best **supports** helping buyers and sellers make informed, intelligent decisions.

We are an **interdependent** team. **No one** transcends the office. We all have a **collective** goal, which is to **serve** our clients at the **highest** level.

SECTION 2 WRAP-UP

AHA'S:

ACTION ITEMS:

1. **Create a team ideology YOU believe in!** (Mission, Vision, Values, Beliefs and Expectations)
2. **Analyze and revise your mission, vision, values, beliefs and expectations daily until you are convinced of their power and feel an overwhelming urge to share.**
3. **Introduce your mission, vision, values, beliefs and expectations to your existing team with enthusiasm.** (The team must sense that YOU are fully vested in the ideology!)
4. **Instruct your team to internalize the mission, vision, values, beliefs and expectations.** (All team members must become fully vested in the ideology!)
5. **Review the mission, vision, values, beliefs and expectations with your team weekly until each member can recite all with confidence and without hesitation.**

DETERMINE YOUR "LEADING" GRADE

- A** = All team members know the ideology, love it, and live it daily! (**Committed**)
- B** = All team members know the ideology, live it, but don't love it. (**Compliant**)
- C** = Team members know the ideology and occasionally live it. (**Casual**)
- D** = Team members know the ideology but don't love it or live it. (**Combative**)
- F** = No one knows the ideology. (**Clueless**)

YOUR PRIORITY:

SECTION 3: Planning

**You must arise each day with a plan and
execute that plan with all your ability!**

THE PLANNING DISCIPLINE

Planning is requisite for being productively active!

Planning revolves around three primary components:

- Goals (key benchmarks)
- Plans (three models)
- Strategies (vital activities)

To “plan” is to answer five key questions:

1. WHY?
2. WHAT?
3. HOW?
4. WHO?
5. WHEN?



Thus,



The five planning responsibilities are:

1. Goals
2. Financial Model
3. Operational Model
4. Organizational Model
5. Performance Standards

THINK OF IT THIS WAY

Team Goal – Substantiates **why** the team exists.

Financial Model – Identifies **what** the team must do.

Operational Model – Identifies **how** the team will do it.

Organizational Model – Identifies **who** on the team will do it.

Performance Standards – Identifies **when** the team will do it.

6. CALCULATE A YEARLY PROFIT GOAL

Goals should be motivating, not intimidating!

Creating a **team** goal based upon **each** member's personal **aspirations** allows you to create a **meaningful** mantra that will keep the team **motivated** throughout the year.

TEAM MANTRA

IT IS UNACCEPTABLE
FOR OUR TEAM TO
PROFIT LESS THAN

\$ _____ !!!

PLACE YOUR EXPECTED YEARLY PROFIT IN THE BLANK ABOVE

WARNING: The profit goal **MUST** be a **team** goal and not **JUST** a Lead Agent goal.
(The **team** must **own** the goal!)

The team **cannot** function around a “come help **me** achieve **my** goals” attitude!

THINK OF IT THIS WAY

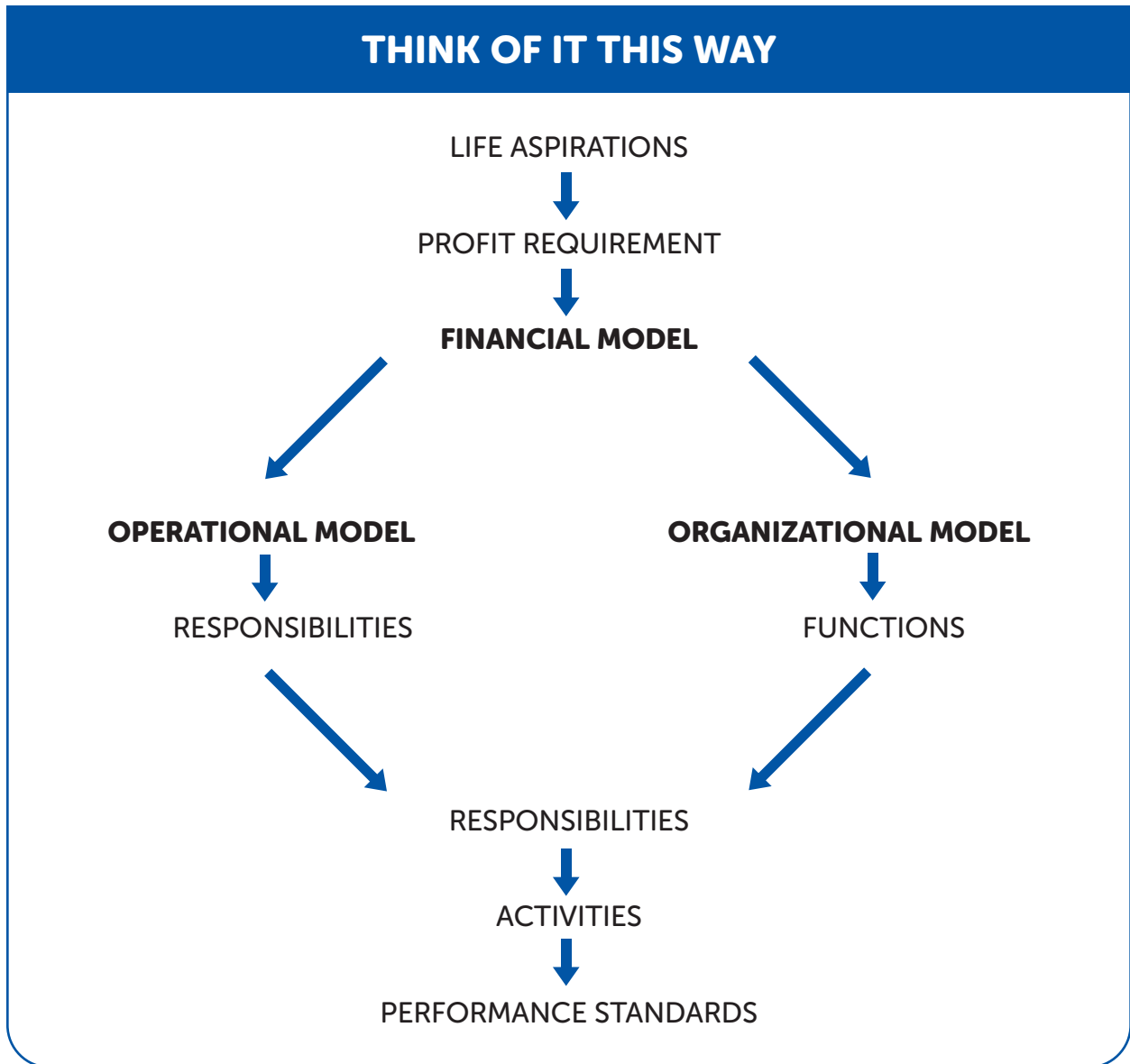
Lead Agent
+
Coordinator
+
Buyer Specialist

= TEAM GOAL

THE 3 MODELS

Inefficiency is the result of not having a plan!

Highly Proficient Teams operate from **three basic models**. These models **combine** to form a basic **business plan**, which is then relied upon to generate the **profit** needed to fund the aspirations of **all** team members.



Financial Model = **What** the team must do.

Operational Model = **How** the team will do it.

Organizational Model = **Who** on the team will do it.

7. CREATE A FINANCIAL MODEL

All team members must fully understand the financial model!

Desired Profit	_____
Budgeted Expenses	_____
Average Commission Rate	_____
Average Sales Price	_____

Transaction Benchmark Calculation:

Desired Profit _____
+ Budgeted Expenses _____
= Revenue Needed _____

Revenue Needed _____
÷ Average Commission Rate _____
= Closed Volume Needed _____

Closed Volume Needed _____
÷ Average Sales Price _____
= Transactions Needed _____

TRANSACTION BENCHMARK _____

SAMPLE BUSINESS BUDGET

Account:	Yearly Amount
Accounting	
Advertising	
Automobile	
Bank Charges	
Broker	
Computer Software	
Contract Labor	
Copies	
Depreciation	
Dues	
Education	
Equipment	
E&O Insurance	
Fax	
Gifts	
Insurance (Auto)	
Insurance (Health)	
Internet	
Legal	
Lock Boxes	
Marketing	
Meals	
Miscellaneous	
Office Fees	
Printing	
Postage	
Rent	
Repairs & Maintenance	
Salaries	
Signs	
Supplies	
Taxes (Federal)	
Taxes (Payroll)	
Telephone	
Tolls	
Travel	
TOTAL BUSINESS EXPENSES	

SAMPLE COMMISSION RATE GUIDE

Highly Proficient Teams never react in the field!

COMMISSION RATE GUIDE

LISTING DIVISION:

- Small Listings (\$_____) _____%
- Large Listings (\$_____) _____%
- Doubles (seller is also buying) _____%
- Lots _____%
- Acreage _____%
- Commercial _____%
- Investors _____%
- Home Builders _____%
- Referral Given _____%
- Referral Received _____%
- Transaction Fee _____%
- Fee for Service (hourly rate) \$_____ /hr

BUYER DIVISION:

- Small Buyers (\$_____) _____%
- Large Buyers (\$_____) _____%
- Doubles (seller is also buying) _____%
- Investors _____%
- Referral Given _____%
- Referral Received _____%
- Transaction Fee _____%
- Fee for Service (hourly rate) \$_____ /hr

NOTE:

Having a standard commission rate guide keeps all team members **consistent** and from **reacting** in the field.

A MOMENTUM EXAMPLE

Team Members Financial Needs (Profit Goal = \$700,000):

Lead Agent = \$500,000

Buyer Specialist = \$180,000

Transaction Coordinator = \$20,000 (needs to make \$60,000, which is “reasonable”)

Operating Expenses:

\$300,000 (Including \$40,000 base salary for Transaction Coordinator)

Financial Model Calculation:

Total Revenue Needed = \$ 1,000,000 (\$700,000 + \$300,000)

Average Commission = \div .028

Closed Production = \$36,000,000 (rounded **up**)

Average Sales Price = \div \$250,000

Transaction Benchmark = **144**

Operational Model Allocation:

65% Sellers = 93 Closed Listings

35% Buyers = 51 Closed Buyers

Verification Calculation:

Listing Dept. Revenue = \$ 651,000 (93 x \$250,000 x .028)

Buyer Dept. Revenue = +\$ 178,500 (51 x \$250,000 x .028 x 50%)

Total Income = \$ 829,500

Operating Expenses = -\$300,000

Total Profit = \$ 529,500

Lead Agent Needs = \$500,000

Excess Revenue = \$ 29,500 (\$20,000 to TC; \$3,325 to BS; \$6,175 to LA)

Everybody Wins:

Lead Agent = \$500,000 + \$6,175 = **\$506,175**

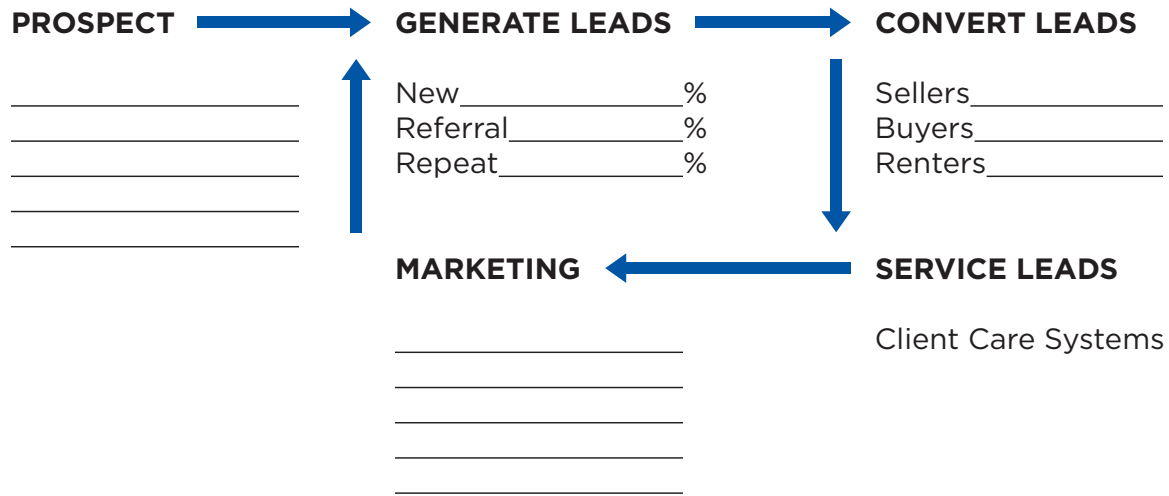
Buyer Specialist = \$178,500 + \$3,325 = **\$181,825**

Trans. Coordinator = \$40,000 + \$20,000 = **\$60,000**

8. CREATE AN OPERATIONAL MODEL

TRANSACTION BENCHMARK _____ (from Financial Model)

Transaction Source	Listings Sold	Buyers Closed
Network	_____	_____
FSBO	_____	_____
Expired	_____	_____
Open House	_____	_____
Farming	_____	_____
Sign Calls	_____	_____
Ad Calls	_____	_____
Just Listed	_____	_____
Just Sold	_____	_____
Internet/Websites	_____	_____
Total Transactions	_____	_____



REAL ESTATE OPERATIONAL MODEL

There must be an understanding of each member's role in the operational model!



Operational Assessment:

How **proactive** is your operational model?

How much money does **each** lead-generation department make?

What percentage of your leads comes from **each** lead-generation department?

What **strategy** do you use for each lead-generation source?

What percentage of your leads is **new**?

What percentage of your leads is **repeat**?

What percentage of your leads is **referral**?

What percentage of your business are **sellers**? What are your key **conversion** rates?

What percentage of your business are **buyers**? What are your key **conversion** rates?

What percentage of your business are **renters**? What are your key **conversion** rates?

What contract-to-close **systems** do you have in place?

How do you **communicate** with your clients? Medium? Frequency?

What is the feedback from your client **surveys**? Sellers? Buyers? Renters?

What is your average client satisfaction **rating**? Does it vary among lead generation sources?

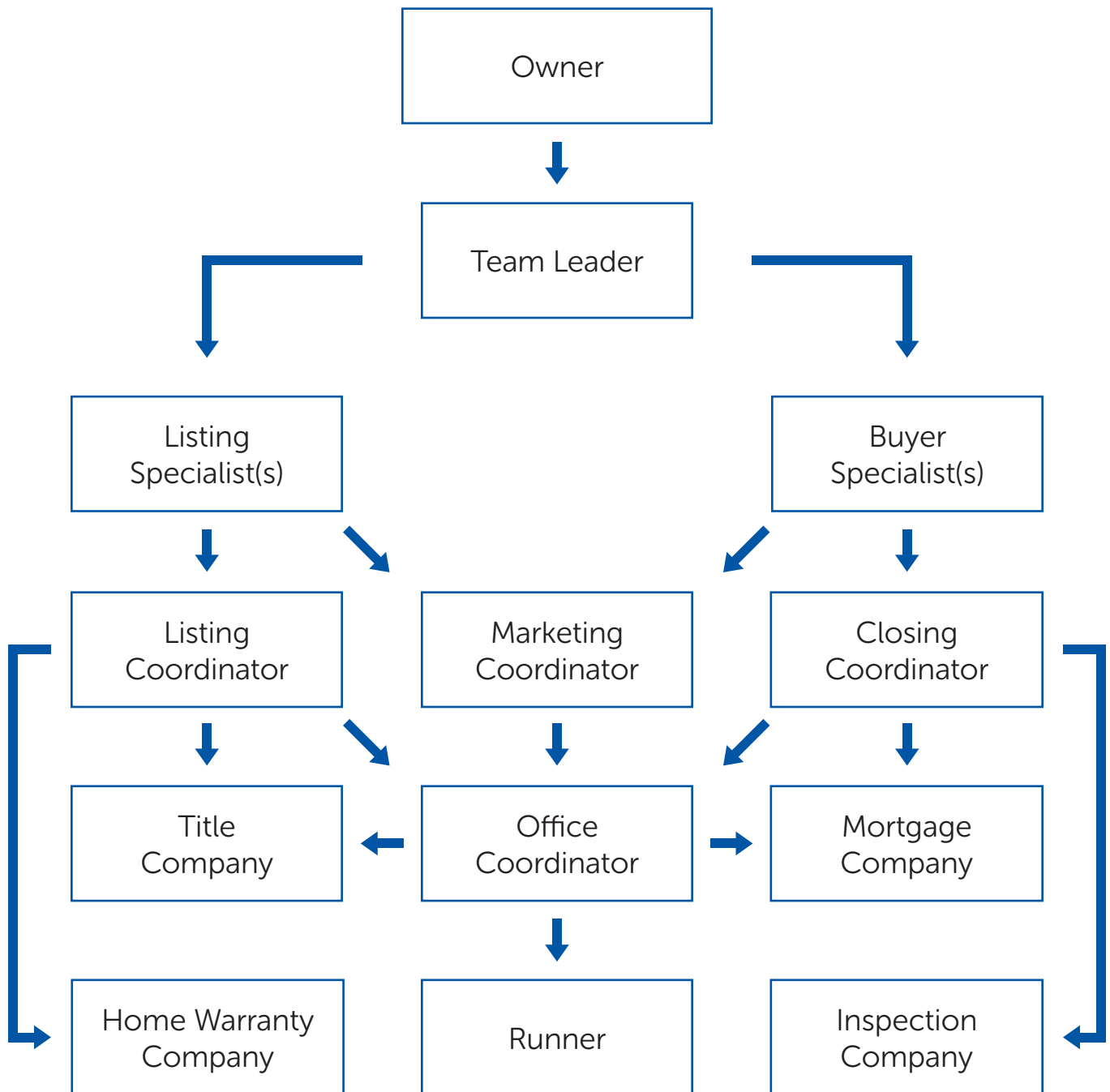
What **follow-up** systems exist in your business?

Who are your **allied** resources? Mortgage? Title? Inspector? Home Warranty?

What **tier** is your business?

9. CREATE AN ORGANIZATIONAL MODEL

Each member on the team is responsible for one or more functions!



ORGANIZATIONAL EVALUATION

It's either you do or you delegate; the choice is yours!

Regardless of your tier, there are **eight** different **functions** in a real estate sales business; each of which **must** be accounted for.

THE 8 KEY FUNCTIONS OF A THRIVING SALES BUSINESS

Dollar-Productive Functions:

1. Listing Specialist (Director of Listings)
2. Buyer Specialist (Director of Buyers)

Administrative Functions:

3. Team Leader (Director of Planning & Staffing)
4. Listing Coordinator (Director of Listing Administration)
5. Closing Coordinator (Director of Buyer Administration)
6. Marketing Coordinator (Director of Marketing)
7. Office Coordinator (Director of Hospitality & Information)
8. Runner (Director of Transit)

YOU ARE 8 HIRES AWAY FROM BEING CONSISTENTLY AWAY!

Do You Own a Business or a Job?

How many of the key positions do **you** currently hold? _____

How many of the positions are being totally **neglected**? _____

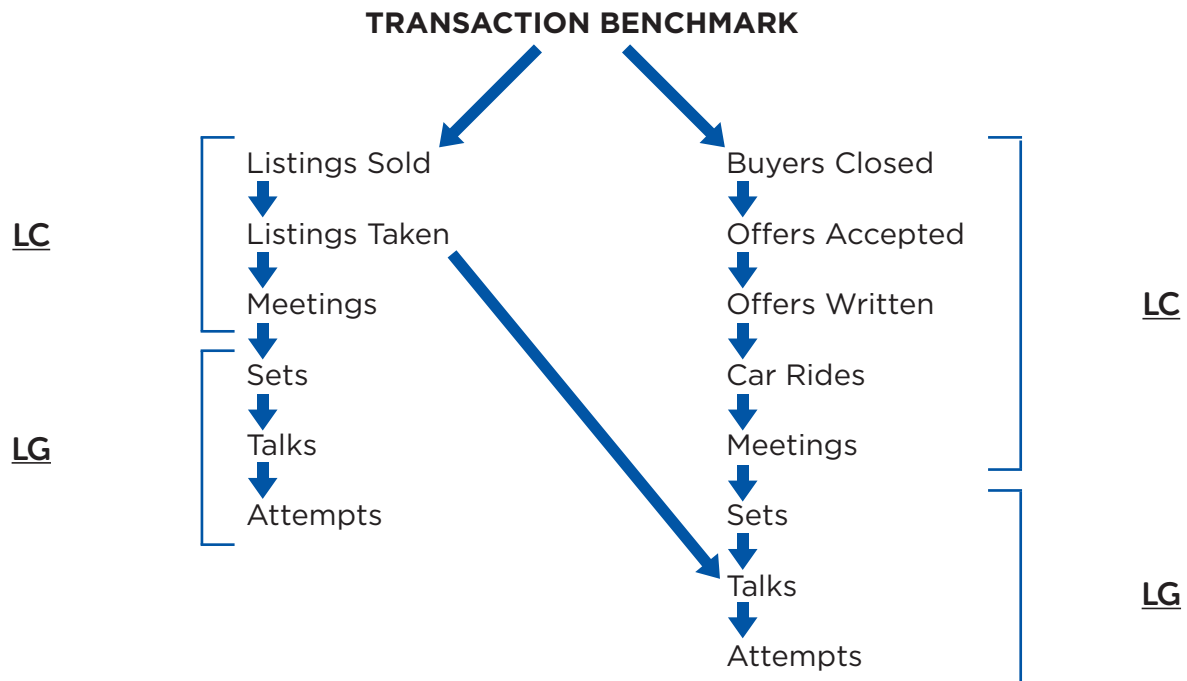
How many are filled by **talented people** you **consistently** hold accountable?

NOTE:

Your answers to the above questions reveal how **leveraged** you are as a **Lead Agent**, and whether you own a business or a job.

10. CALCULATE KEY PERFORMANCE STANDARDS

Performance standards cannot become performance suggestions!



13 KEY PERFORMANCE STANDARDS

LISTING DEPARTMENT:

- Dials per Talk
- Talks per Set
- Sets per Meeting
- Meetings per Listing
- Sales Percentage
- Buyer Calls per Listings Taken

BUYER DEPARTMENT:

- Dials per Talk
- Talks per Set
- Sets per Meeting
- Meetings per Car Ride
- Car Rides per Offer Written
- Written per Accepted Offer
- Accepted per Closed Offer

THE IMPORTANCE OF STANDARDS

Lack of performance standards keeps most teams from realizing their potential!

Performance standards must be calculated and defined for **each** position on the team!

Calculating performance standards reveals whether the goal is **realistic**. (After calculating performance standards, you will know whether the team is set up to fail or succeed.)

Performance standards reduce goals to **activities** that can be directly **controlled**.

PERFORMANCE STANDARDS HELP MAKE EACH KEY ACTIVITY

Specific – Clearly defined and/or identified

Measurable – Easily measured and/or quantifiable

Action Oriented – Revolves around an action verb – something you “do”

Realistic – Achievable

Time Sensitive – Performed within a specified period of time

WARNING: Without performance standards there can be no meaningful **accountability**. (Performance standards provide the framework for accountability, which is **missing** on most teams.)

Performance standards identify exactly **what** must be done and the **levels** at which they must be done. (Make sure everyone on the team knows what is required to succeed in the position and the **gauges** that will be monitored.)

Performance standards **eliminate** any and all **gray** areas.

Performance standards serve as the **minimum** requirements for goal achievement.

HINT: It should be **unacceptable** for team members to do **less** (and it's highly **recommended** that they do **more**) than the pre-determined performance standards.

Performance standards must be **adjusted** monthly.

A MOMENTUM EXAMPLE

LISTING CONVERSION RATES

LISTING DEPARTMENT	Network 60%	Expired 20%	FSBO 10%	Farming 5%	Just Sold 5%
Listings Sold ^A	56	19	9	5	4
Sales Percentage ^B	95%	85%	95%	95%	95%
Conversion Rate ^C	98%	75%	80%	80%	85%
Show-up Rate ^D	95%	67%	80%	80%	75%
Set Rate ^E	10%	15%	25%	90%	1%
Talks Rate ^F	90%	15%	80%	1%	20%

^AAnticipated number of listings you will sell from source (from operational model)

^BPercentage of listings that sell from source

^CPercentage of time you get the listing from source

^DPercentage of time prospect from source does not cancel the listing meeting

^EPercentage of time you set an appointment when talking to someone from source

^FPercentage of time you talk to a prospect when making a proactive attempt from source

LISTING SPECIALIST PERFORMANCE STANDARDS

	Network	Expired	FSBO	Farming	Just Sold
Taken ^G	59	22	10	6	5
Meetings ^H	60	30	13	8	6
Sets ^I	63	45	16	10	8
Talks ^J	630	300	64	11	800
Attempts ^K	700 Dials	2,000 Dials	80 Knocks	1,100 Members	4,000 Dials

^G $A \div B$

^H $A \div B \div C$

^I $A \div B \div C \div D$

^J $A \div B \div C \div D \div E$

^K $A \div B \div C \div D \div E \div F$

MONTHLY LISTING ACCOUNTABILITY GAUGES

	Network	Expired	FSBO	Farming	Just Sold	Total
Taken ^L	4	2	1	<1	<1	8
Meetings ^M	5	3	1	<1	<1	11
Sets ^N	6	4	2	<1	1	14
Talks ^O	53	25	5	70	67	220
Attempts ^P	58	167	7	*350 ^{Dials}	333	915

Divide **all listing performance standards** by the number of months per year committed to business.

* 2,100 members x 4 calls per year = 8,400 total calls ÷ 12 = 700 dials per month ÷ 2 callers = 350

NOTE: Above numbers are based on 12 months per year

WEEKLY LISTING ACCOUNTABILITY GAUGES

	Network	Expired	FSBO	Farming	Just Sold	Total
Meetings ^M	1	<1	<1	<1	<1	3
Sets ^N	2	1	<1	<1	<1	4
Talks ^O	14	7	1	19	18	59
Attempts ^P	16	45	2	93	89	245

Divide **relevant listing performance standards** by number of weeks per year committed to business.

NOTE: Above numbers are based on 45 weeks per year

DAILY LISTING ACCOUNTABILITY LEVERS

	Network	Expired	FSBO	Farming	Just Sold	Total
Talks ^Q	3	2	<1	4	4	14
Attempts ^R	4	9	<1	19	18	51

Divide **relevant weekly accountability standards** by number of days per week committed to business.

NOTE: Above numbers are based on 5 days per week

BUYER CONVERSION RATES

BUYER DEPARTMENT	Network 40%	Open House 15%	Farm 5%	Property Calls 25%	Just Listed 5%	Web Sites 10%
Buyers Closed ^A	20	8	2	13	3	5
Closed Percentage ^B	95%	95%	95%	95%	95%	95%
Acceptance Rate ^C	90%	85%	85%	85%	85%	85%
Written Rate ^D	95%	90%	90%	90%	90%	90%
Car Ride Rate ^E	90%	70%	70%	70%	70%	70%
Show-up Rate ^F	95%	60%	80%	60%	80%	50%
Set Rate ^G	10%	15%	90%	5%	1%	1%
Talks Rate ^H	90%	100%	1%	N/A	20%	N/A

^AAnticipated number of buyers you will close from source (see operational model)

^BPercentage of accepted offers that close from source

^CPercentage of written offers that get accepted from source

^DPercentage of buyers you show homes to who write an offer from source

^EPercentage of prospects you meet with who get into your car from source

^FPercentage of time prospect from source does not cancel the listing meeting

^GPercentage of time you set an appointment when talking to someone from source

^HPercentage of time you talk to a prospect when making a proactive attempt from source

BUYER SPECIALIST PERFORMANCE STANDARDS

	Network	O/H	Farm	P. Calls	J/L	Web
Accepted ^I	21	9	3	14	4	6
Written ^J	24	10	4	16	5	7
Car Rides ^K	25	11	5	18	6	8
Meetings ^L	27	16	7	26	8	11
Sets ^M	29	26	9	43	10	22
Talks ^N	288	175	10	852	1,000	2,200
Attempts ^O	320 Dials	175 Visitors	1,000 Members	N/A	5,000 Dials	N/A

^IA÷B

^JA÷B÷C

^KA÷B÷C÷D

^LA÷B÷C÷D÷E

^MA÷B÷C÷D÷E÷F

^NA÷B÷C÷D÷E÷F÷G

^OA÷B÷C÷D÷E÷F÷G÷H

MONTHLY BUYER ACCOUNTABILITY GAUGES

	Network	O/H	Farm	P. Calls	J/L	Web	Total
Accepted	2	1	<1	1	<1	<1	5
Written	2	1	<1	1	<1	1	6
Car Rides	3	1	<1	2	<1	1	7
Meetings	3	2	<1	2	<1	1	8
Sets	3	2	<1	4	1	2	13
Talks	24	15	70	71	83	183	446
Attempts	27	15	*350 Dials	N/A	417	N/A	809

Divide **all buyer performance standards** by number of months per year committed to business.

*2,100 members x 4 calls per year = 8,400 total calls ÷ 12 = 700 dials per month ÷ 2 callers = 350

NOTE: Above numbers are based on 12 months per year

WEEKLY BUYER ACCOUNTABILITY GAUGES

	Network	O/H	Farm	P. Calls	J/L	Web	Total
Car Rides	<1	<1	<1	<1	<1	<1	2
Meetings	<1	<1	<1	<1	<1	<1	2
Sets	<1	<1	<1	1	<1	<1	4
Talks	6	4	19	19	22	49	119
Attempts	7	4	93	N/A	111	N/A	215

Divide **relevant buyer performance standards** by number of weeks per year committed to business.

NOTE: Above numbers are based on 45 weeks per year

DAILY BUYER ACTIVITY LEVERS

	Network	O/H	Farm	P. Calls	J/L	Web	Total
Talks	1	1	4	4	5	10	25
Attempts	2	1	19	N/A	22	N/A	44

Divide **relevant weekly accountability standards** by number of days per week committed to business.

NOTE: Above numbers are based on 5 days per week

SECTION 3 WRAP-UP

AHA'S:

ACTION ITEMS:

- 1. Determine your team's financial needs and then create a team-centered profit goal.** (Goal must satisfy all members' financial needs.)
- 2. Use the profit goal, budget and commission guide to prepare a Financial Model. Share the Financial Model with the entire team.** (The entire team must understand the Financial Model and how all components work together to achieve the goal.)
- 3. Use the transaction benchmark to establish an Operational Model. Share the Operational Model with the entire team.** (The entire team must understand the Operational Model and each member's role in making it hum.)
- 4. Complete a team Organizational Model by writing a team member's name next to every function on the chart. Share the Organizational Model with the entire team.** (The entire team must understand the Organizational Model and each member's function and responsibilities.)
- 5. Calculate the key Performance Standards needed to achieve the profit goal. Share the Performance Standards with the entire team.** (It should be unacceptable to do less than the required Performance Standards.)

YOUR PRIORITY:

SECTION 4: Staffing

**Building a team is a conscious decision to expand
one's capacity and further one's ambitions!**

THE STAFFING DISCIPLINE

Hiring different people will not resolve the issues of a team that lacks clarity!

Most think teambuilding revolves **solely** around staffing. This is simply **not** true.

The leading and planning disciplines are just as, if not **more**, important than the staffing discipline.

WARNING: Without a core ideology, goal, plan and performance standards, your team, over time, will resemble one big **cluster of dysfunction!**

Therefore, it's not **until** you have established directional clarity, behavioral clarity, financial clarity, operational clarity **and** organizational clarity that you should consider **adding** people!

HINT: Gaining **clarity** will **resolve** most existing **team** issues.

Once you have a well-conceived Mission, Vision, Values, Beliefs, Expectations, Goal, Financial Model, Operational Model, Organizational Model **and** Performance Standards you should begin **staffing** based on your overall **ambition** and required **capacity**.

Staffing involves **MORE** than simply **hiring** people.

The five staffing responsibilities are:

1. Assessing
2. Hiring
3. Developing
4. Rewarding
5. Retaining

11. ASSESS YOUR CURRENT SITUATION

Some teams only need tweaking, while others must be completely revamped!

Staffing **begins** with Assessing, which involves gaining a full **understanding** of the required positions and the **capabilities** of any team members currently serving in those positions.

ASSESSING ANSWERS THE BASIC QUESTION:

Based on the team vision, goals and ambition, whom must I replace and/or add?

Therefore, a full assessment requires:

Position Assessment

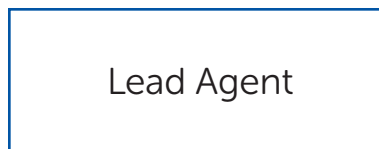
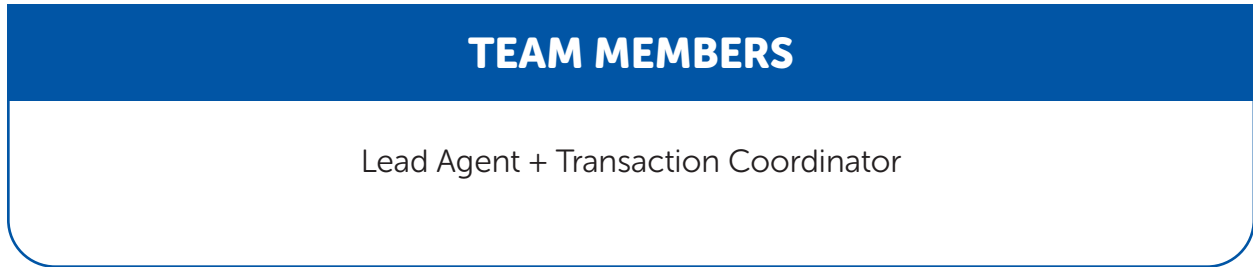
People Assessment

To fully assess each position, you must:

- Create an Organizational Chart **necessary** for realizing the one-year team vision & goal (both money and time), and Lead Agent objective.
- Assemble **performance**-based job descriptions for **each** position on the organizational chart. (Hint: An effective job description is simply a **combination** of the **vital activities** lists and **performance standards**.)
- Define the knowledge, skills and dispositions required by **each** position.
- Establish key performance standards for **each** position.
- Identify the behavioral style best suited for **each** position.

MOMENTUM EXAMPLE

Tier 2 Organizational Chart



Objective = Consistently Dollar-Productive

Capacity = 80 - 100 Hours

MOMENTUM EXAMPLE

Tier 2 – Job Descriptions

LEAD AGENT

- Provide Mission and Vision (T&D)
- Prepare/Revise Economic, Operational and Organizational Models (T&D)
- Recruit Team Members (T&D)
- Train Team Members (T&D)
- Consult Team Members (T&D)
- Prepare Team Goals and Hold Team Accountable to the Goals (T&D)
- Hold Weekly Team Meetings (T&D)
- Review Monthly Financial Statements (T&D)
- Pay Bills (T&D)
- Make Deposits (T&D)
- Memorize and Internalize Listing Scripts (T&D)
- Memorize and Internalize Buyer Scripts (T&D)
- Attend Closings (S)
- Review all Closing Documents (S)
- Review Title Commitments and HUD Statements (S)
- Prepare Amendments and Negotiate Repairs for Sellers (S)
- Deliver Contracts (S)
- Present Offers and Negotiate Contracts for Sellers (S)
- Proactively Solicit Multiple Offers (S)
- Review Inspection Reports and Prepare/Negotiate Amendments for Buyers (S)
- Make all Follow-up Calls to Sellers (S)
- Make all Follow-up Calls to Buyers (S)
- Prepare Weekly Client Updates (email if applicable) (S)
- Obtain Loan Payoff Information from Seller (S)
- Obtain HOA Information from Seller (S)
- Deliver Home Fliers (S)
- Make Separate Set of House Keys (S)
- Place/Remove Lockboxes (S)
- Place/Remove Signs (S)
- Take Pictures of Interior/Exterior (S)
- Take Room Measurements and Complete MLS Input Sheet (S)
- Attend all Listing Conversations (LC)
- Confirm Listing Appointments (LC)
- Prepare Listing Agreement and Related Addenda (LC)
- Deliver Pre-Listing Guides/DVDs (LC)
- Prepare Pricing Tools (LC)
- Complete Pre-Listing Questionnaire (LC)
- Write Offers and Negotiate Contracts for Buyers (LC)
- Show Homes to “A” Buyers (LC)
- Prepare Consultant Showing Packages for Buyers (LC)
- Search MLS and FSBO Inventories for Homes (LC)
- Verify Buyer Price Range with Lender (LC)
- Put all Buyers through Buyers Process (LC)
- Confirm Buyer Appointments (LC)
- Follow up on all Seller Leads (LG)
- Visit For Sale by Owners (LG)
- Call Expired Listings (LG)
- Call/Visit Neighbors around Just-Sold Properties (LG)
- Call in Farm Areas (LG)
- Follow up on all Buyer Leads (LG)
- Answer/Follow up on all Buyer Sign Calls (LG)
- Hold Open Houses (LG)
- Call/Visit Neighbors around Just-Listed Properties (LG)
- Call Apartment Complexes (LG)

MOMENTUM EXAMPLE (continued)

Tier 2 – Job Descriptions

TRANSACTION COORDINATOR

- Attend Weekly Team Meeting (T&D)
- Mail Customer Surveys (S)
- Communicate with Title Company and Buyer's Agent (S)
- Schedule Closings with Sellers (S)
- Schedule Home Cleanings (if necessary) (S)
- Copy Repair Invoices for File (S)
- Schedule Home Inspections with Sellers (S)
- Solicit Feedback on Showings (S)
- Supply Broker with all Contracts, Addenda and Notices (S)
- Inform Showing Service of Showing Instructions (S)
- Input/Update Listing in MLS (Change Status) (S)
- Create Listing Files (S)
- Mail Appropriate Letters/Notes to Sellers (S)
- Assemble Consultant's Listing Tools for Listing Conversations (LC)
- Email Pre-Listing Video (LC)
- Mail Homestead Exemption Forms to Buyers (S)
- Mail HUD 1 Statements to Buyers (S)
- Coordinate Closing Gifts for Buyers (S)
- Secure Property Owner's Insurance and Home Warranty (S)
- Contact Mortgage/Title Company on Weekly Basis (S)
- Set Closing Dates and Times for Buyers (S)
- Deliver Amendments to Mortgage/Title Company (if necessary) (S)
- Check Home's Insurability with Insurance Company (S)
- Notify Listing Agents of Inspection Times (S)
- Schedule Inspections for Buyers (S)
- Supply Broker with all Contracts, Addenda and Notices (S)
- Open Title (S)
- Email Offers/Counter-Offer to Listing Agents (LC)
- Schedule Showings (LC)
- Call Listing Agents to Verify Availability (LC)
- Mail Appropriate Letters/Notes to Buyers (LC)
- Create Sales Files (LC)
- Assemble Consultant's Buyer Tools for Buyer Conversations (LC)
- Order and Mail Just-Sold Cards (S)
- Order and Mail Just-Listed Cards (S)
- Update Website with New Listings (Change Status) (S)
- Write/Place Home Ads (S)
- Email Home Fliers to Area Agents (S)
- Create/Order Home Fliers (S)
- Assemble/Coordinate Pre-Listing Guides (LC)
- Maintain Social Networks (LG)
- Maintain Database Management Program (LG)
- Maintain Long-Term Follow-up Program (LG)
- Maintain Short-Term Follow-up Program (LG)
- Create/Update Ads on Craigslist (LG)
- Prepare/Assemble FSBO Items of Value (LG)
- Prepare Daily Call List (LG)
- Coordinate Open Houses (LG)
- Coordinate Geographic Farm Mailers (LG)
- Distribute Website and Email Leads (LG)
- Answer all Incoming Phone Calls (OA)
- Update Office Voice Message Daily (OA)
- Check Office Email (OA)
- Make Copies (OA)
- Check/Sort Mail (OA)
- Order/Maintain Office Supplies (OA)
- Back Up Computer Files on a Weekly Basis (OA)
- Create/Update Vendor List (OA)

MOMENTUM EXAMPLE

Tier 3 Organizational Chart



Objective = Consistently H-B-U or A-M-E

Capacity = 120 - 150 Hours

MOMENTUM EXAMPLE

Tier 3 – Job Descriptions

LEAD AGENT

- Provide Mission and Vision (T&D)
- Prepare/Revise Economic, Operational and Organizational Models (T&D)
- Recruit Team Members (T&D)
- Train Team Members (T&D)
- Consult Team Members (T&D)
- Prepare Team Goals and Hold Team Accountable to the Goals (T&D)
- Hold Weekly Team Meetings (T&D)
- Review Monthly Financial Statements (T&D)
- Pay Bills (T&D)
- Make Deposits (T&D)
- Memorize and Internalize Listing Scripts (T&D)
- Attend Closings for Sellers (S)
- Review Title Commitments and HUD Statements (S)
- Prepare Amendments and Negotiate Repairs for Sellers (S)
- Present Offers and Negotiate Contracts for Sellers (S)
- Proactively Solicit Multiple Offers (S)
- Make all Follow-up Calls to Sellers (S)
- Prepare Weekly Client Updates (email if applicable) (S)
- Obtain Loan Payoff Information from Seller (S)
- Obtain HOA Information from Seller (S)
- Deliver Home Fliers (S)
- Make Separate Set of House Keys (S)
- Place/Remove Lockboxes (S)
- Place/Remove Signs (S)
- Take Pictures of Interior/Exterior (S)
- Take Room Measurements and Complete MLS Input Sheet (S)
- Attend all Listing Conversations (LC)
- Confirm Listing Appointments (LC)
- Prepare Listing Agreement and Related Addenda (LC)
- Deliver Pre-Listing Guides/DVDs (LC)
- Prepare Pricing Tools (LC)
- Complete Pre-Listing Questionnaire (LC)
- Follow Up on all Seller Leads (LG)
- Call Expired Listings (LG)
- Call/Visit Neighbors around Just-Sold Properties (LG)
- Call in Farm Areas (LG)

MOMENTUM EXAMPLE (continued)

Tier 3 – Job Descriptions

BUYER SPECIALIST

- Attend Weekly Team Meeting (T&D)
- Memorize and Internalize Buyer Scripts (T&D)
- Attend Closings for Buyers (S)
- Review all Closing Documents (S)
- Set Closing Dates and Times for Buyers (S)
- Review Inspection Reports and Prepare/Negotiate Amendments for Buyers (S)
- Make all Follow-up Calls to Buyers (S)
- Deliver Contracts (S)
- Write Offers and Negotiate Contracts for Buyers (LC)
- Show Homes to “A” Buyers (LC)
- Prepare Consultant Showing Packages for Buyers (LC)
- Search MLS and FSBO Inventories for Homes (LC)
- Verify Buyer Price Range with Lender (LC)
- Put all Buyers through Buyers Process (LC)
- Confirm Buyer Appointments (LC)
- Answer/Follow Up on all Buyer Leads/Sign Calls (LG)
- Visit For Sale by Owners (LG)
- Hold Open Houses (LG)
- Call/Visit Neighbors around Just-Listed Properties (LG)

MOMENTUM EXAMPLE (continued)

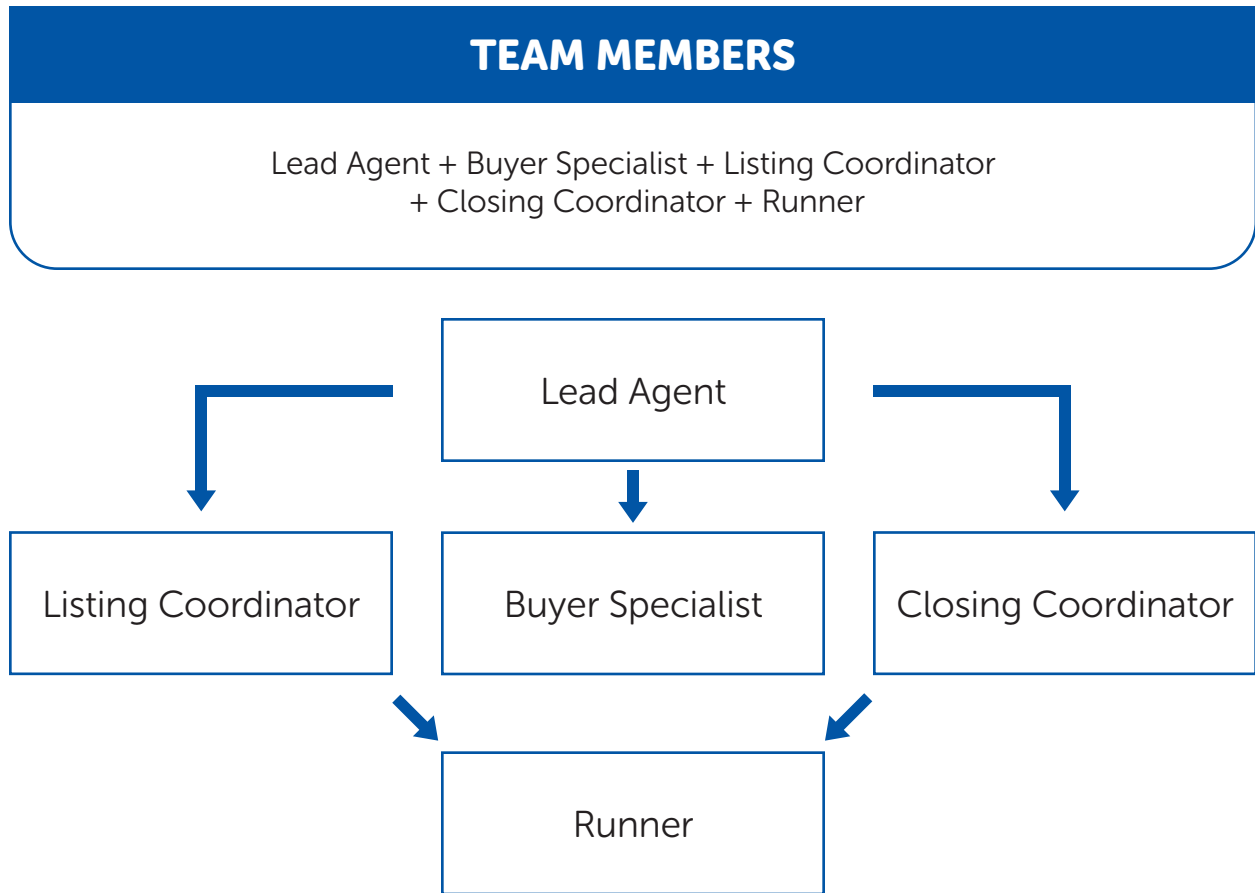
Tier 3 – Job Descriptions

TRANSACTION COORDINATOR

- Attend Weekly Team Meeting (T&D)
- Mail Customer Surveys (S)
- Communicate with Title Company and Buyer's Agent (S)
- Schedule Closings with Sellers (S)
- Schedule Home Cleanings (if necessary) (S)
- Copy Repair Invoices for File (S)
- Schedule Home Inspections with Sellers (S)
- Solicit Feedback on Showings (S)
- Supply Broker with all Contracts, Addenda and Notices (S)
- Inform Showing Service of Showing Instructions (S)
- Input/Update Listing in MLS (Change Status) (S)
- Create Listing Files (S)
- Mail Appropriate Letters/Notes to Sellers (S)
- Assemble Consultant's Listing Tools for Listing Conversations (LC)
- Email Pre-Listing Video (LC)
- Mail Homestead Exemption Forms to Buyers (S)
- Mail HUD 1 Statements to Buyers (S)
- Mail Customer Surveys (S)
- Coordinate Closing Gifts for Buyers (S)
- Secure Property Owner's Insurance and Home Warranty (S)
- Contact Mortgage/Title Company on Weekly Basis (S)
- Deliver Amendments to Mortgage/Title Company (if necessary) (S)
- Check Home's Insurability with Insurance Company (S)
- Notify Listing Agents of Inspection Times (S)
- Schedule Inspections for Buyers (S)
- Supply Broker with all Contracts, Addenda and Notices (S)
- Open Title (S)
- Email Offers/Counter-Offer to Listing Agents (LC)
- Schedule Showings (LC)
- Call Listing Agents to Verify Availability (LC)
- Mail Appropriate Letters/Notes to Buyers (LC)
- Create Sales Files (LC)
- Assemble Consultant's Buyer Tools for Buyer Conversations (LC)
- Order and Mail Just-Sold Cards (S)
- Order and Mail Just-Listed Cards (S)
- Update Website with New Listings (Change Status) (S)
- Write/Place Home Ads (S)
- Email Home Fliers to Area Agents (S)
- Create/Order Home Fliers (S)
- Assemble/Coordinate Pre-Listing Guides (LC)
- Maintain Social Networks (LG)
- Maintain Database Management Program (LG)
- Maintain Long-Term Follow-up Program (LG)
- Maintain Short-Term Follow-up Program (LG)
- Create/Update Ads on Craigslist (LG)
- Prepare/Assemble FSBO Items of Value (LG)
- Prepare Daily Call List (LG)
- Coordinate Open Houses (LG)
- Coordinate Geographic Farm Mailers (LG)
- Distribute Website and Email Leads (LG)
- Answer all Incoming Phone Calls (OA)
- Update Office Voice Message Daily (OA)
- Check Office Email (OA)
- Make Copies (OA)
- Check/Sort Mail (OA)
- Order/Maintain Office Supplies (OA)
- Back-up Computer Files on a Weekly Basis (OA)
- Create/Update Vendor List (OA)

MOMENTUM EXAMPLE

Tier 4 Organizational Chart



Objective = Consistently H-B-U or A-M-E

Capacity = 185 - 220 Hours

MOMENTUM EXAMPLE

Tier 4 – Job Descriptions

LEAD AGENT

- Provide Mission and Vision (T&D)
- Prepare/Revise Economic, Operational and Organizational Models (T&D)
- Recruit Team Members (T&D)
- Train Team Members (T&D)
- Consult Team Members (T&D)
- Prepare Team Goals and Hold Team Accountable to the Goals (T&D)
- Hold Weekly Team Meetings (T&D)
- Review Monthly Financial Statements (T&D)
- Pay Bills (T&D)
- Make Deposits (T&D)
- Memorize and Internalize Listing Scripts (T&D)
- Attend Closings for Sellers (S)
- Review Title Commitments and HUD Statements (S)
- Prepare Amendments and Negotiate Repairs for Sellers (S)
- Present Offers and Negotiate Contracts for Sellers (S)
- Proactively Solicit Multiple Offers (S)
- Make all Follow-up Calls to Sellers (S)
- Attend all Listing Conversations (LC)
- Prepare Pricing Tools (LC)
- Follow Up on all Seller Leads (LG)
- Call Expired Listings (LG)
- Call/Visit Neighbors around Just-Sold Properties (LG)
- Call in Farm Areas (LG)

MOMENTUM EXAMPLE (continued)

Tier 4 – Job Descriptions

BUYER SPECIALIST

- Attend Weekly Team Meeting (T&D)
- Memorize and Internalize Buyer Scripts (T&D)
- Attend Closings for Buyers (S)
- Review all Closing Documents (S)
- Review Inspection Reports and Prepare/Negotiate Amendments for Buyers (S)
- Make all Follow-up Calls to Buyers (S)
- Write Offers and Negotiate Contracts for Buyers (LC)
- Show Homes to “A” Buyers (LC)
- Search MLS and FSBO Inventories for Homes (LC)
- Verify Buyer Price Range with Lender (LC)
- Put all Buyers through Buyers Process (LC)
- Follow Up on all Buyer Leads (LG)
- Answer/Follow Up on all Buyer Sign Calls (LG)
- Visit For Sale by Owners (LG)
- Hold Open Houses (LG)
- Call/Visit Neighbors around Just-Listed Properties (LG)

MOMENTUM EXAMPLE (continued)

Tier 4 – Job Descriptions

LISTING COORDINATOR

- Attend Weekly Team Meeting (T&D)
- Mail Seller Surveys (S)
- Communicate with Title Company and Buyer's Agent (S)
- Schedule Closings with Sellers (S)
- Schedule Home Cleanings (if necessary) (S)
- Copy Repair Invoices for File (S)
- Schedule Home Inspections with Sellers (S)
- Prepare Weekly Client Updates (email if applicable) (S)
- Solicit Feedback on Showings (S)
- Update Website with New Listings (Change Status) (S)
- Write/Place Home Ads (S)
- Email Home Fliers to Area Agents (S)
- Create/Order Home Fliers (S)
- Order and Mail Just-Listed Cards (S)
- Obtain Loan Payoff Information from Seller (S)
- Obtain HOA Information from Seller (S)
- Supply Broker with all Contracts, Addenda and Notices (S)
- Inform Showing Service of Showing Instructions (S)
- Input/Update Listing in MLS (Change Status) (S)
- Create Listing Files (S)
- Mail Appropriate Letters/Notes to Sellers (S)
- Prepare Listing Agreement and Related Addenda (LC)
- Assemble Consultant's Listing Tools for Listing Conversations (LC)
- Confirm Listing Appointments (LC)
- Assemble/Coordinate Pre-Listing Guides (LC)
- Email Pre-Listing Video (LC)
- Complete Pre-Listing Questionnaire (LC)
- Maintain Social Networks (LG)
- Coordinate Geographic Farm Mailers (LG)
- Answer all Incoming Phone Calls (OA)
- Update Office Voice Message Daily (OA)
- Back Up Computer Files on a Weekly Basis (OA)
- Make Copies (OA)

MOMENTUM EXAMPLE (continued)

Tier 4 – Job Descriptions

RUNNER

- Attend Weekly Team Meeting (T&D)
- Deliver Contracts (S)
- Deliver Amendments to Mortgage/Title Company (if necessary) (S)
- Deliver Home Fliers (S)
- Make Separate Set of House Keys (S)
- Place/Remove Lockboxes (S)
- Place/Remove Signs (S)
- Take Pictures of Interior/Exterior (S)
- Take Room Measurements and Complete MLS Input Sheet (S)
- Deliver Pre-Listing Guides/DVDs (LC)
- Locate For Sale By Owners (LG)

MOMENTUM EXAMPLE (continued)

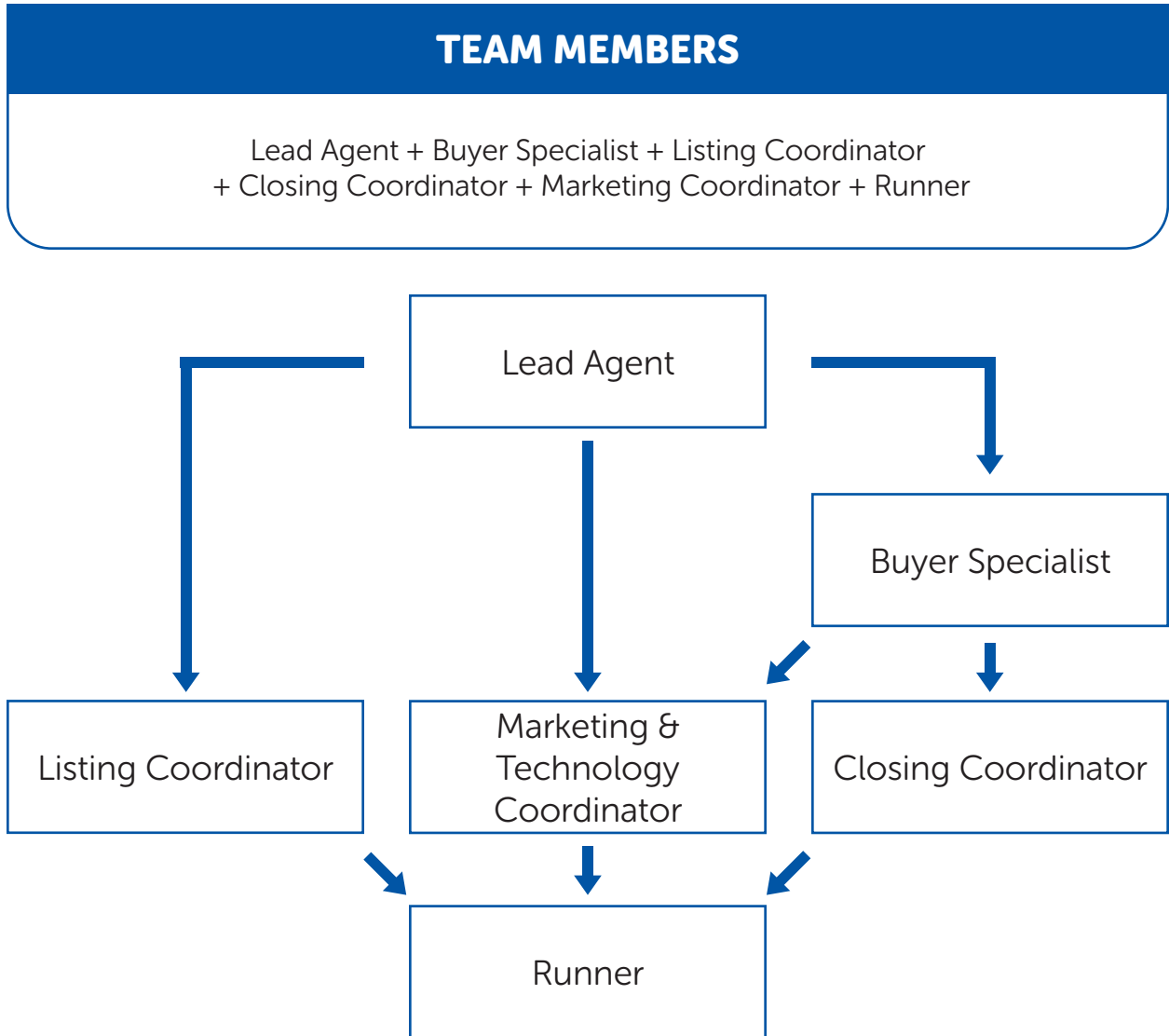
Tier 4 – Job Descriptions

CLOSING COORDINATOR

- Attend Weekly Team Meeting (T&D)
- Make Copies (S)
- Mail Buyer Surveys (S)
- Mail Homestead Exemption Forms to Buyers (S)
- Mail HUD 1 Statements to Buyers (S)
- Mail Customer Surveys (S)
- Coordinate Closing Gifts for Buyers (S)
- Secure Property Owner's Insurance and Home Warranty (S)
- Contact Mortgage/Title Company on Weekly Basis (S)
- Set Closing Dates and Times for Buyers (S)
- Check Home's Insurability with Insurance Company (S)
- Notify Listing Agents of Inspection Times (S)
- Schedule Inspections for Buyers (S)
- Supply Broker with all Contracts, Addenda and Notices (S)
- Open Title (S)
- Email Offers/Counter-Offer to Listing Agents (LC)
- Schedule Showings (LC)
- Prepare Consultant Showing Packages for Buyers (LC)
- Call Listing Agents to Verify Availability (LC)
- Mail Appropriate Letters/Notes to Buyers (LC)
- Create Sales Files (LC)
- Assemble Consultant's Buyer Tools for Buyer Conversations (LC)
- Confirm Buyer Appointments (LC)
- Order and Mail Just-Sold Cards (S)
- Maintain Database Management Program (LG)
- Maintain Long-Term Follow-up Program (LG)
- Maintain Short-Term Follow-up Program (LG)
- Create/Update Ads on Craigslist (LG)
- Prepare/Assemble FSBO Items of Value (LG)
- Prepare Daily Call List (LG)
- Coordinate Open Houses (LG)
- Distribute Website and Email Leads (LG)
- Check Office Email (OA)
- Make Copies (OA)
- Check/Sort Mail (OA)
- Order/Maintain Office Supplies (OA)
- Create/Update Vendor List (OA)

MOMENTUM EXAMPLE

Tier 5 Organizational Chart



Objective = Consistently H-B-U or A-M-E

Capacity = 225 - 275 Hours

MOMENTUM EXAMPLE

Tier 5 – Job Descriptions

LEAD AGENT

- Provide Mission and Vision (T&D)
- Prepare/Revise Economic, Operational and Organizational Models (T&D)
- Recruit Team Members (T&D)
- Train Team Members (T&D)
- Consult Team Members (T&D)
- Prepare Team Goals and Hold Team Accountable to the Goals (T&D)
- Hold Weekly Team Meetings (T&D)
- Review Monthly Financial Statements (T&D)
- Pay Bills (T&D)
- Make Deposits (T&D)
- Memorize and Internalize Listing Scripts (T&D)
- Attend Closings for Sellers (S)
- Review Title Commitments and HUD Statements (S)
- Prepare Amendments and Negotiate Repairs for Sellers (S)
- Present Offers and Negotiate Contracts for Sellers (S)
- Proactively Solicit Multiple Offers (S)
- Make all Follow-up Calls to Sellers (S)
- Attend all Listing Conversations (LC)
- Prepare Pricing Tools (LC)
- Follow-up on all Seller Leads (LG)
- Call Expired Listings (LG)
- Visit Neighbors around Just-Sold Properties (LG)
- Call in Farm Areas (LG)

MOMENTUM EXAMPLE (continued)

Tier 5 – Job Descriptions

BUYER SPECIALIST

- Attend Weekly Team Meeting (T&D)
- Memorize and Internalize Buyer Scripts (T&D)
- Attend Closings for Buyers (S)
- Review all Closing Documents (S)
- Review Inspection Reports and Prepare/Negotiate Amendments for Buyers (S)
- Make all Follow-up Calls to Buyers (S)
- Write Offers and Negotiate Contracts for Buyers (LC)
- Show Homes to “A” Buyers (LC)
- Search MLS and FSBO Inventories for Homes (LC)
- Verify Buyer Price Range with Lender (LC)
- Put all Buyers through Buyers Process (LC)
- Follow-up on all Buyer Leads (LG)
- Answer/Follow-up on all Buyer Sign Calls (LG)
- Visit For Sale by Owners (LG)
- Hold Open Houses (LG)
- Call/Visit Neighbors around Just-Listed Properties (LG)

MOMENTUM EXAMPLE (continued)

Tier 5 – Job Descriptions

LISTING COORDINATOR

- Attend Weekly Team Meeting (T&D)
- Mail Seller Surveys (S)
- Communicate with Title Company and Buyer's Agent (S)
- Schedule Closings with Sellers (S)
- Schedule Home Cleanings (if necessary) (S)
- Copy Repair Invoices for File (S)
- Schedule Home Inspections with Sellers (S)
- Prepare Weekly Client Updates (Email if applicable) (S)
- Solicit Feedback on Showings (S)
- Obtain Loan Payoff Information from Seller (S)
- Obtain HOA Information from Seller (S)
- Supply Broker with all Contracts, Addenda and Notices (S)
- Inform Showing Service of Showing Instructions (S)
- Input Listing in MLS (Change Status) (S)
- Create Listing Files (S)
- Mail Appropriate Letters/Notes to Sellers (S)
- Prepare Listing Agreement and Related Addenda (LC)
- Assemble Consultant's Listing Tools for Listing Conversations (LC)
- Confirm Listing Appointments (LC)
- Complete Pre-Listing Questionnaire (LC)
- Answer all Incoming Phone Calls (OA)
- Update Office Voice Message Daily (OA)
- Back-up Computer Files on a Weekly Basis (OA)

MOMENTUM EXAMPLE (continued)

Tier 5 – Job Descriptions

MARKETING COORDINATOR

- Attend Weekly Team Meeting (T&D)
- Call Neighbors Around Just-Listed Properties (S)
- Order and Mail Just-Listed Cards (S)
- Call Neighbors Around Just-Sold Properties
- Order and Mail Just-Sold Cards (S)
- Update Website with New Listings (Change Status) (S)
- Write/Place Home Ads (S)
- Email Home Fliers to Area Agents (S)
- Create/Order Home Fliers (S)
- Assemble/Coordinate Pre-Listing Guides (LC)
- Email Pre-Listing Video (LC)
- Maintain Social Networks (LG)
- Maintain Database Management Program (LG)
- Maintain Long-Term Follow-up Program (LG)
- Maintain Short-Term Follow-up Program (LG)
- Create/Update Ads on Craigslist (LG)
- Prepare/Assemble FSBO Items of Value (LG)
- Prepare Daily Call List (LG)
- Coordinate Open Houses (LG)
- Coordinate Geographic Farm Mailers (LG)
- Distribute Website and Email Leads (LG)
- Manage team image and brand awareness (LG)
- Check Office Email (OA)
- Create/Update Vendor List (OA)

MOMENTUM EXAMPLE (continued)

Tier 5 – Job Descriptions

CLOSING COORDINATOR

- Attend Weekly Team Meeting (T&D)
- Mail Buyer Surveys (S)
- Mail Homestead Exemption Forms to Buyers (S)
- Mail HUD 1 Statements to Buyers (S)
- Mail Customer Surveys (S)
- Coordinate Closing Gifts for Buyers (S)
- Secure Property Owner's Insurance & Home Warranty (S)
- Contact Mortgage/Title Company on Weekly Basis (S)
- Set Closing Dates and Times for Buyers (S)
- Check Home's Insurability with Insurance Company (S)
- Notify Listing Agents of Inspection Times (S)
- Schedule Inspections for Buyers (S)
- Supply Broker with all Contracts, Addenda and Notices (S)
- Open Title (S)
- Email Offers/Counter-Offers to Listing Agents (LC)
- Schedule Showings (LC)
- Prepare Consultant Showing Packages for Buyers (LC)
- Call Listing Agents to Verify Availability (LC)
- Mail Appropriate Letters/Notes to Buyers (LC)
- Create Sales Files (LC)
- Assemble Consultant's Buyer Tools for Buyer Conversations (LC)
- Confirm Buyer Appointments (LC)
- Make Copies (OA)
- Check/Sort Mail (OA)
- Order/Maintain Office Supplies (OA)

MOMENTUM EXAMPLE (continued)

Tier 5 – Job Descriptions

RUNNER

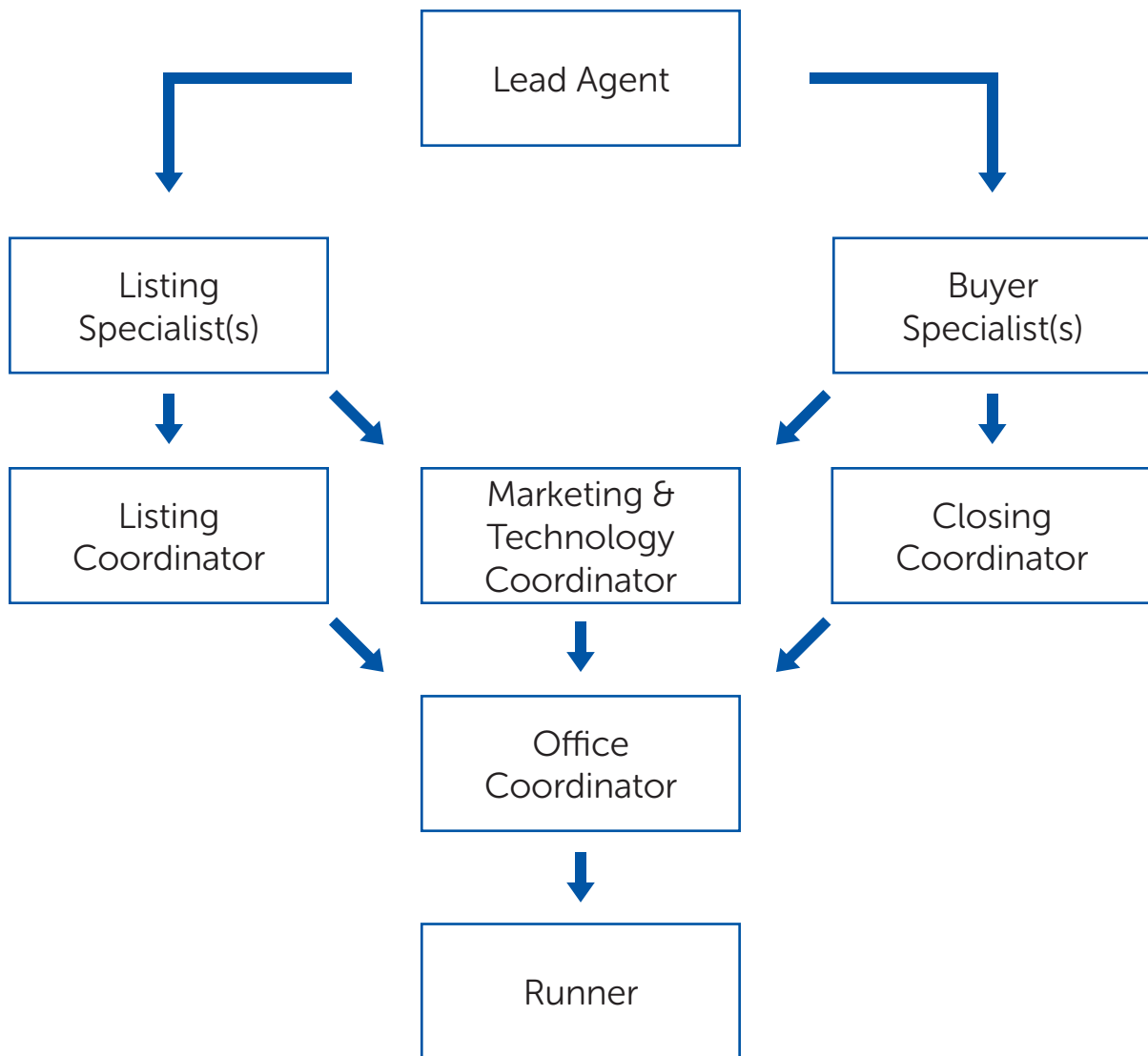
- Attend Weekly Team Meeting (T&D)
- Deliver Contracts (S)
- Deliver Amendments to Mortgage/Title Company (if necessary) (S)
- Deliver Home Fliers (S)
- Make Separate Set of House Keys (S)
- Place/Remove Lockboxes (S)
- Place/Remove Signs (S)
- Take Pictures of Interior/Exterior (S)
- Take Room Measurements and Complete MLS Input Sheet (S)
- Deliver Pre-Listing Guides/DVDs (LC)
- Locate For Sale By Owners (LG)

MOMENTUM EXAMPLE

Tier 6 Organizational Chart

TEAM MEMBERS

Lead Agent + Listing Specialist + Buyer Specialist + Listing Coordinator
+ Closing Coordinator + Marketing Coordinator + Office Coordinator + Runner



Objective = Consistently Away

Capacity = 280 - 450 Hours

MOMENTUM EXAMPLE

Tier 6 – Job Descriptions

LEAD AGENT

- Provide Mission and Vision (T&D)
- Prepare/Revise Economic, Operational and Organizational Models (T&D)
- Recruit Team Members (T&D)
- Train Team Members (T&D)
- Consult Team Members (T&D)
- Prepare Team Goals and Hold Team Accountable to the Goals (T&D)
- Hold Weekly Team Meetings (T&D)
- Review Monthly Financial Statements (T&D)
- Pay Bills (T&D)
- Make Deposits (T&D)

LISTING SPECIALIST

- Attend Weekly Team Meeting (T&D)
- Memorize and Internalize Listing Scripts (T&D)
- Attend Closings for Sellers (S)
- Review Title Commitments and HUD Statements (S)
- Prepare Amendments and Negotiate Repairs for Sellers (S)
- Present Offers and Negotiate Contracts for Sellers (S)
- Proactively Solicit Multiple Offers (S)
- Make all Follow-up Calls to Sellers (S)
- Attend all Listing Conversations (LC)
- Prepare Pricing Tools (LC)
- Follow-up on all Seller Leads (LG)
- Call Expired Listings (LG)
- Visit Neighbors around Just-Sold Properties (LG)
- Call in Farm Areas (LG)

MOMENTUM EXAMPLE (continued)

Tier 6 – Job Descriptions

BUYER SPECIALIST

- Attend Weekly Team Meeting (T&D)
- Memorize and Internalize Buyer Scripts (T&D)
- Attend Closings for Buyers (S)
- Review all Closing Documents (S)
- Review Inspection Reports and Prepare/Negotiate Amendments for Buyers (S)
- Make all Follow-up Calls to Buyers (S)
- Write Offers and Negotiate Contracts for Buyers (LC)
- Show Homes to “A” Buyers (LC)
- Search MLS and FSBO Inventories for Homes (LC)
- Verify Buyer Price Range with Lender (LC)
- Put all Buyers through Buyers Process (LC)
- Follow-up on all Buyer Leads (LG)
- Answer/Follow-up on all Buyer Sign Calls (LG)
- Visit For Sale by Owners (LG)
- Hold Open Houses (LG)
- Call/Visit Neighbors around Just-Listed Properties (LG)

LISTING COORDINATOR

- Attend Weekly Team Meeting (T&D)
- Mail Seller Surveys (S)
- Communicate with Title Company and Buyer’s Agent (S)
- Schedule Closings with Sellers (S)
- Schedule Home Cleanings (if necessary) (S)
- Copy Repair Invoices for File (S)
- Schedule Home Inspections with Sellers (S)
- Prepare Weekly Client Updates (Email if applicable) (S)
- Solicit Feedback on Showings (S)
- Obtain Loan Payoff Information from Seller (S)
- Obtain HOA Information from Seller (S)
- Supply Broker with all Contracts, Addenda and Notices (S)
- Inform Showing Service of Showing Instructions (S)
- Input/Update Listing in MLS (Change Status) (S)
- Create Listing Files (S)
- Mail Appropriate Letters/Notes to Sellers (S)
- Prepare Listing Agreement and Related Addenda (LC)
- Assemble Consultant’s Listing Tools for Listing Conversations (LC)
- Confirm Listing Appointments (LC)
- Complete Pre-Listing Questionnaire (LC)

MOMENTUM EXAMPLE (continued)

Tier 6 – Job Descriptions

MARKETING COORDINATOR

- Attend Weekly Team Meeting (T&D)
- Call Neighbors Around Just-Listed Properties (S)
- Order and Mail Just-Listed Cards (S)
- Call Neighbors Around Properties
- Order and Mail Just-Sold Cards (S)
- Update Website with New Listings (Change Status) (S)
- Write/Place Home Ads (S)
- Email Home Fliers to Area Agents (S)
- Create/Order Home Fliers (S)
- Assemble/Coordinate Pre-Listing Guides (LC)
- Email Pre-Listing Video (LC)
- Maintain Social Networks (LG)
- Maintain Database Management Program (LG)
- Maintain Long-Term Follow-up Program (LG)
- Maintain Short-Term Follow-up Program (LG)
- Create/Update Ads on Craigslist (LG)
- Prepare/Assemble FSBO Items of Value (LG)
- Prepare Daily Call List (LG)
- Coordinate Open Houses (LG)
- Coordinate Geographic Farm Mailers (LG)
- Distribute Website and Email Leads (LG)
- Manage Team Image and Brand Awareness (LG)

MOMENTUM EXAMPLE (continued)

Tier 6 – Job Descriptions

CLOSING COORDINATOR

- Attend Weekly Team Meeting (T&D)
- Mail Buyer Surveys (S)
- Mail Homestead Exemption Forms to Buyers (S)
- Mail HUD 1 Statements to Buyers (S)
- Mail Customer Surveys (S)
- Coordinate Closing Gifts for Buyers (S)
- Secure Property Owner's Insurance & Home Warranty (S)
- Contact Mortgage/Title Company on Weekly Basis (S)
- Set Closing Dates and Times for Buyers (S)
- Check Home's Insurability with Insurance Company (S)
- Notify Listing Agents of Inspection Times (S)
- Schedule Inspections for Buyers (S)
- Supply Broker with all Contracts, Addenda and Notices (S)
- Open Title (S)
- Email Offers/Counter-Offer to Listing Agents (LC)
- Schedule Showings (LC)
- Prepare Consultant Showing Packages for Buyers (LC)
- Call Listing Agents to Verify Availability (LC)
- Mail Appropriate Letters/Notes to Buyers (LC)
- Create Sales Files (LC)
- Assemble Consultant's Buyer Tools for Buyer Conversations (LC)
- Confirm Buyer Appointments (LC)

MOMENTUM EXAMPLE (continued)

Tier 6 – Job Descriptions

OFFICE COORDINATOR

- Attend Weekly Team Meeting (T&D)
- Answer all Incoming Phone Calls (OA)
- Check Office Email (OA)
- Update Office Voice Message Daily (OA)
- Make Copies (OA)
- Check/Sort Mail (OA)
- Order/Maintain Office Supplies (OA)
- Back up Computer Files on a Weekly Basis (OA)
- Create/Update Vendor List (OA)

RUNNER

- Attend Weekly Team Meeting (T&D)
- Deliver Contracts (S)
- Deliver Amendments to Mortgage/Title Company (if necessary) (S)
- Deliver Home Fliers (S)
- Make Separate Set of House Keys (S)
- Place/Remove Lockboxes (S)
- Place/Remove Signs (S)
- Take Pictures of Interior/Exterior (S)
- Take Room Measurements and Complete MLS Input Sheet (S)
- Deliver Pre-Listing Guides/DVDs (LC)
- Locate For Sale By Owners (LG)

MOMENTUM EXAMPLE

Key Competencies – Listing Specialist

Knowledge	Skills	Disposition	Performance Standards
Listing Agreement Listing Addenda Pricing R/E Finance Geographic Area MLS Software	Communication Conversation Presentation Negotiation Strategic Analysis Computer Calculator	Cultural: Intentional Proactive Discontent Personal: Intelligence Creativity Decision Making Integrity Initiative Organization Self-Awareness Energy Enthusiasm Interpersonal: First Impression Likability Listening Team Player Customer Focus Assertiveness Persuasion Leadership: Inspiration Ambition Accountable	<ul style="list-style-type: none"> • Attend all closings • Present all offers in person w/in 24 hrs. • Respond to all counter-offers w/in 24 hrs. • Update sellers via weekly phone call • Take 2 new listings/week • Meet with 3 sellers/week • Set 4 listing meetings/week • Master listing dialogue • Follow up on all seller leads w/in 12 hrs • Call 23+ people in network/week • Call 45+ expired listings/week • Call 93+ residents in farm area/week • Visit/Call 89+ neighbors around Just Sold properties/week • Attend all listing related training • Attend all weekly staff meetings • Review performance with T/L weekly

MOMENTUM EXAMPLE

Key Competencies – Buyer Specialist

Knowledge	Skills	Disposition	Performance Standards
<p>Sales Contracts Sales Addenda R/E Finance Buyer Process Pricing Geographic Area MLS Software</p>	<p>Communication Conversation Negotiation Strategic Analysis Computer Calculator</p>	<p>Cultural: Intentional Proactive Discontent</p> <p>Personal: Intelligence Creativity Decision Making Integrity Organization Energy Enthusiasm</p> <p>Interpersonal: First Impression Likability Listening Team Player Customer Focus Assertiveness Persuasion</p> <p>Leadership: Inspiration Ambition Accountable</p>	<ul style="list-style-type: none"> • Attend all closings • Respond to all counter-offers w/in 24 hrs. • Communicate with buyers weekly • Write 1 offer/week • Attend 2 buyer meetings per week • Set 4 buyer meetings per week • Put all prospects through buyers process • Show homes to only “A” buyers • Master buyer dialogue • Follow up on all ad & sign calls w/in 12 hrs. • Hold 1 open house/ week • Call 93+ residents in farm area/week • Visit 2+ FSBOs per week and follow up accordingly • Visit/Call 111+ neighbors around Just-Listed properties/week • Attend all buyer related training • Attend all weekly staff meetings • Review performance with T/L weekly

MOMENTUM EXAMPLE

Key Competencies – Listing Coordinator

Knowledge	Skills	Disposition	Performance Standards
MLS Software MS Office Internet Email	Communication Computer Data Entry Filing	<p>Cultural: Intentional Proactive Discontent</p> <p>Personal: Integrity Intelligence Organization Independence Stress Management Energy</p> <p>Interpersonal: Customer Focus Team Player Listening</p> <p>Leadership: Accountable</p>	<p>Maintain Inventory: 10 Pre-List Packages 10 Cons. Packages</p> <p>Out Within 24 hrs: Pre-Listing Guide Letters/Notes Just-Listed Cards Customer Survey Confirm Appt. Seller Surveys MLS Data Entry</p> <p>In Within 24 hrs: HOA Info. Loan Payoff Info. Listing Feedback</p> <p>Contact Within 24 hrs: Showing Service Confirming Calls</p> <p>Weekly Contacts: Pending Sellers Title Company</p> <p>Other: Attend all weekly staff meetings Review performance with T/L weekly</p>

MOMENTUM EXAMPLE

Key Competencies – Closing Coordinator

Knowledge	Skills	Disposition	Performance Standards
MLS Software MS Office Internet Email	Communication Computer Calculator Data Entry Filing	Cultural: Intentional Proactive Discontent Personal: Integrity Intelligence Organization Independence Stress Management Energy Interpersonal: Customer Focus Team Player Listening Leadership: Accountable	Maintain Inventory: 10 Buyer's Guides 10 Cons. Packages Out Within 24 hrs: Letters/Notes Just-Sold Cards Customer Survey Confirm Appt. Buyer Surveys In Within 48 hrs: Inspections Contact Within 24 hrs: Home Inspector Showing Service Confirming Calls Weekly Contacts: Pending Buyers Title Company Mortgage Co. Other: Attend all weekly staff meetings Review performance with T/L weekly

MOMENTUM EXAMPLE

Key Competencies – Marketing Coordinator

Knowledge	Skills	Disposition	Performance Accountabilities
MLS Software MS Office MS Publisher Internet Email	Communication Computer Writing	Cultural: Intentional Proactive Discontent Personal: Integrity Creativity Organization Independence Energy Interpersonal: Team Player Likeability Listening Customer Focus Persuasion Leadership: Accountable	Maintain lead generation call lists daily Deliver 33-touch, 16-touch, & 8-in-8 on appropriate dates Order home flyers w/in 24 hrs. Update client database w/in 24 hrs. Update social networks w/in 24 hrs. Coordinate all weekend open houses by preceding Tuesday Mail neighborhood update cards to farm area monthly Mail 200 Just-Listed cards to neighbors around new listings Mail 200 Just-Sold cards to neighbors around new sales Create/update marketing pieces monthly Attend weekly staff meetings Review performance with T/L weekly

MOMENTUM EXAMPLE

Key Competencies – Office Coordinator

Knowledge	Skills	Disposition	Performance Accountabilities
<p>Phones Copier Internet Email</p>	<p>Communication Computer Phone</p>	<p>Cultural: Intentional Proactive Discontent</p> <p>Personal: Integrity Organization Independence Stress Management Enthusiasm Energy</p> <p>Interpersonal: Likeability First Impressions Listening Customer Focus Team Player</p> <p>Leadership: Accountable</p>	<p>Update website and check email daily</p> <p>Review social media sites daily</p> <p>Answer all calls w/in 3 rings</p> <p>Mail appropriate letters and notes w/in 24 hrs.</p> <p>Update voice message daily</p> <p>Check and order supplies inventory weekly</p> <p>Sort mail daily</p> <p>Back up computer files weekly</p> <p>Attend all weekly staff meetings</p> <p>Review performance with T/L weekly</p>

MOMENTUM EXAMPLE

Key Competencies – Runner

Knowledge	Skills	Disposition	Performance Accountabilities
Geographic Area	Communication Driving	Cultural: Intentional Proactive Discontent Personal: Integrity Organization Independence Enthusiasm Energy Interpersonal: Likeability First Impressions Customer Focus Team Player Leadership: Accountable	Place/Remove signs & lockboxes w/in 24 hrs. Measure rooms w/in 24 hrs. Take pictures w/in 24 hrs. Deliver contracts, flyers, & keys w/in 24 hrs. Deliver pre-listing packages w/in 12 hrs. Deliver new FSBO phone #'s to MC daily Attend weekly staff meetings Review performance with T/L weekly

ASSESS YOUR CURRENT SITUATION (continued)

A mediocre team reaps mediocre profits, which funds a mediocre life!

After assessing the **positions** required, you must assess the team **members** (if any) currently occupying those positions.

To fully assess current team members, ask yourself the following questions:

- Do they totally buy into the mission and vision?
- Do they possess the necessary core values?
- Do they maintain the right attitude?
- Do they abide by the expectations?
- Do they “own” the goal?
- Do they understand and support the plan?
- Are they willing and able to meet and exceed the performance standards?
- Knowing what I know now, would I **rehire** them for the position?

WARNING: Most Lead Agents are **unwilling** to perform a **hard** assessment of current team members in fear of what they may find ... a **mediocre** team.

If you fail to remove and replace **underperforming** team members who are incapable of realizing the vision (simply because you don't want to reassume the position for a while) then you are in essence putting your need to **avoid** discomfort **ahead** of the team. (Remember: No **one** transcends the team!)

WARNING: It's **easier** to keep an underperforming team member than it is to **temporarily** reassume the tasks of the position.

A Highly Proficient Team **requires** learning-based and **enthusiastic** team players! As soon as any team member becomes **content**, the **team** is finished!

12. HIRE TALENT

Hiring involves getting the right people in the right positions!

After assessing, you must hire to **fill** any empty positions.

Your goal is to assemble a **world-class** staff of highly functional, self-managed professionals who **share** your core values and are **excited** about delivering your value proposition in an **extraordinary** way.

To accomplish this, focus on hiring to the team vision, values and value:

Is the candidate willing and able to cast the team **vision**?

Does the candidate share the team core **values**?

Is the candidate willing and able to deliver the team **value** proposition?

HINT: When hiring, focus **more** on what candidates have **done** than on what they can **do**.

DON'T BE TYPICAL!

The following is an example of how most Lead Agents hire:

I desperately need someone for this position (because I no longer want to do it)!

Hey you seem capable!

Will you work on the cheap?

Great, the job is yours!

Now I assume you know what to do! (Go to this class, he'll tell you what to do.)

Call me if there is a problem.

Hurray! I'm freeeeeeeeeee!!!

WARNING: Don't just hire, **abdicate** and **hope** for the best!

INTERVIEWING 101

Don't interview to fill a position, interview to identify talent!

To identify talent, you must know the:

- Job (complete understanding of the position - assessing)
- Candidate's competencies (knowledge, skills, disposition, and behavior)
- Candidate's aspirations (short and long-term career goals)
- Candidate's expectations (compensation, benefits, hours, etc.)

HINT: One of the keys to successful interviewing is being adequately **prepared**.

The following is a list of **tools** you must assemble **before** beginning the interview process:

INTERVIEWING TOOLS

1. Application Forms*
2. Mission, Vision, Values, Beliefs, Expectations & Goals
3. General Questions*
4. Position-Specific Questions*
5. Position-Specific Tests/Evaluations
6. Reference Review Forms*
7. Behavioral Assessment*
8. Staff Development Calendar
9. Training/Procedures Manual(s)
10. Compensation Package

* Available via the RE/MAX Momentum Leverage Summit manual

HIRING TALENT REQUIRES A PROCESS

Building a Highly Proficient Team requires a hiring system!

PHASE 1: INITIAL INTERVIEW – ALL CANDIDATES

1. Application & Evaluation Forms
2. General Questions
3. Your Story & Mission, Vision, Values, Beliefs and Goals

PHASE 2: REFERENCE CHECK – BEST CANDIDATES

4. Reference Questions

PHASE 3: DETAILED INTERVIEW – TOP 3 CANDIDATES

5. Position-Specific Questions
6. Position-Specific Tests
7. Reference Review with Candidate
8. Behavior Review with Candidate
9. Long-Term Career Assessment
10. Win/Lose & Mutual Expectations

PHASE 4: SOCIAL INTERVIEW – TOP 2 CANDIDATES

11. Dinner with Candidate and Spouse
12. Informed & Intelligent Decision

The hiring process described above is comprised of **12 interdependent steps**. (One **isolated** step does not confirm a successful candidate.) To gain the full benefit of the process, you must stay **curious** and confirm that each step **validates** all others!

WARNING: Don't "fall in love" with the candidate; fall in love with the **process**.

NOTE: The entire hiring **process** is taught in the Momentum Leverage Summit class, which is available to all offices that participate in the RE/MAX Momentum program.

A MOMENTUM EXAMPLE

During each interview, you are searching for patterns of success!

Following is a snippet from an initial interview with a potential Buyer Specialist:

What two or three things are you most **looking** for in a career? **Why** are these important to you?

What are you really **good** at doing?

What activities do you prefer **not** to do? Why? What activities **bore** you?

I am looking for a **Buyer Specialist**. This person will **lead** the buyer department and is primarily responsible for making sure buyers who work with us get the home they want, and more importantly, want the home they get. Since buyers make up 35 - 40% of our business, this is a very **important** position. I need someone who possesses a **servant's** mentality and is not intimidated by working with and calling on people they do not know. This person must also be able to effectively **consult** buyers regarding pricing, negotiating and financial strategies.

Give me a quick overview of how your **background** has prepared you for this type of position.

Give me a brief description of your past three jobs (positions) and share with me your biggest **accomplishment** in each.

Consulting buyers to lead them to informed, intelligent decisions is a key responsibility of this position. Share with me where you have done something **similar** in the past. (Explore)

Proactive lead generation is another key responsibility of this position. Share with me where you have done something **similar** in the past. (The key to good interviewing is to get **comparable** examples of accomplishment for **each** key activity.)

Coping with rejection is very important to succeeding in this position. Share with me some **examples** of when you were rejected. How did you deal with it?

Describe for me the **process** you would use to ensure buyers who work with you get the home they want, and more importantly, want the home they get.

What's the best thing you've **accomplished** with the least amount of experience?

What three core **values** are most important to you? Why? Give me some specific **examples** of where you have demonstrated each personally and professionally.

What is the last relevant **training** you attended on how to work buyers more effectively?

What have you done to **improve** yourself over the past year?

Why did you **leave** your previous jobs/positions? Why are you leaving your current job?

Thanks for coming in. We will be interviewing others but I would be curious to know your **thoughts** so far about this position and exactly **why** I should hire you.

WHEN TO MAKE A HIRE

Just because you can doesn't mean you should!

Common **questions** from agents considering making their **first** hire are:

1. When should I hire?

HIRE ONLY WHEN

1. ... you want to see your career and life move to the **next** level (you have a passion to progress).
2. ... you are as effective and efficient as **YOU** can be with the hours you've allotted to your career (vital "stuff" is keeping you from dollar-productive activities).
3. ... you have mastered the art of **proactively** generating leads (you are a proven and **proactive** lead generator).
4. ... you have **routines** that when duplicated produce desired results (your results are by **design** and not by accident).

2. Whom should I hire first?

THE PROPER HIRING SEQUENCE IS AS FOLLOWS

- First – Vital **Administrative** Activities
- Second – Vital Dollar-Productive **Buyer** Activities
- Last – Vital Dollar-Productive **Listing** Activities

THERE IS A METHOD TO THE MADNESS!

13. DEVELOP TEAM MEMBERS

Micro-develop so you don't have to micromanage!

After hiring the right people and putting them in the right positions, your attention must shift to **developing**.

Developing involves helping each team member determine:

1. **What** to do (Job Description)
2. **How** to do (Training Manual)
3. **Why** to do (Ideology)
4. **When** to do (Activities Management System, aka: Time Blocking)

Newly hired team members should not be “**given**” the position immediately. Instead, they should be required to “**earn**” the position away from you over the first **90** days.

HINT: **Micro-developing** team members during the first **90**-days prevents you from having to micromanage them later on.

Developing team members revolves around three key activities:

1. **Training** - Knowledge & Skills
2. **Accountability** - Discipline
3. **Weekly Team Meetings** - Focus

Typical Lead Agents hire and **abdicate**. Successful Entrepreneurs hire and **delegate**.

WARNING: Delegation **REQUIRES** systems!

Training is easy if **systems** (i.e. training manuals) exist for each position.

Most Lead Agents don't **train** team members because they **don't** have systems.

HINT: If you lack systems then have the **team member** you are training **document** the step-by-step procedures for each responsibility **as** you instruct.

REMEMBER:

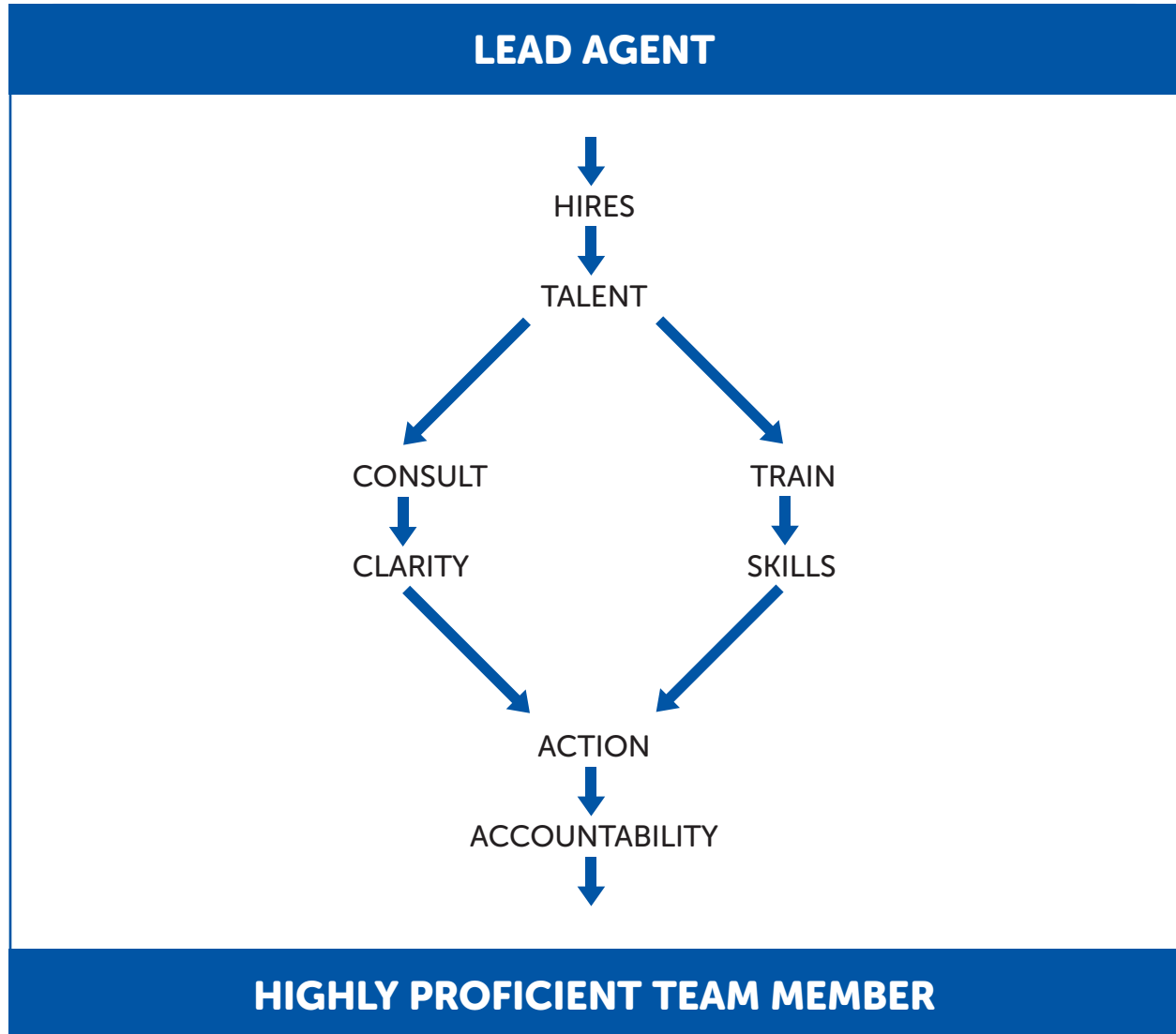
To be **delegable**, routines must be **documented**!

THINK OF IT THIS WAY

A Highly Proficient Team is clear, skilled and disciplined!

Once you hire a new team member, it's imperative he or she has positional:

- **Clarity** – Consulting (mission, vision, expectations, benchmarks, performance standards)
- **Skill** – Training (systems of the position)
- **Discipline** – Accountability (success habits)



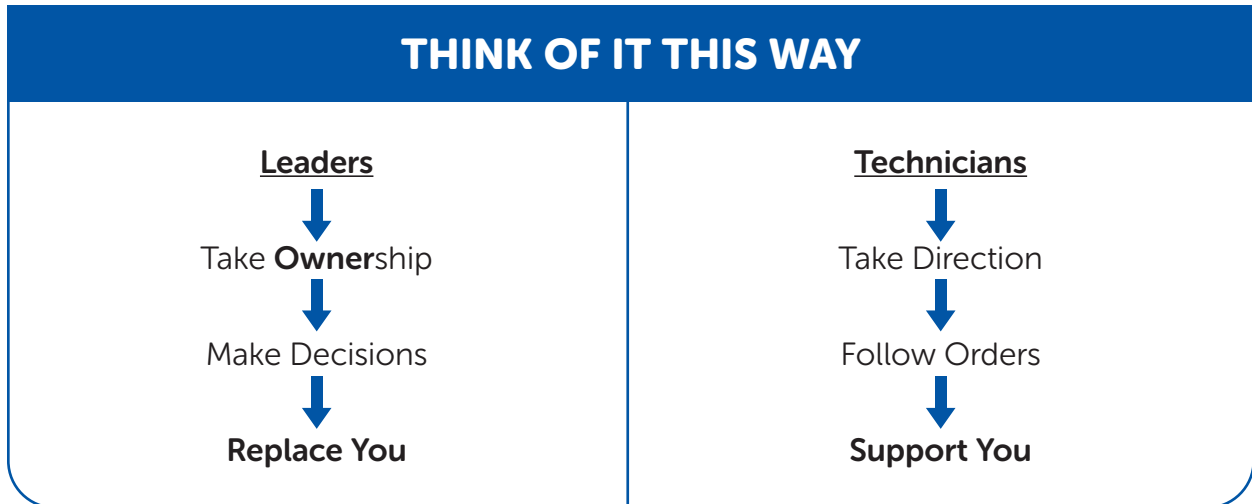
NOTE:

A highly functional staff requires a complete staff development program. You owe team members the opportunity to succeed in their positions.

A WORD ABOUT ATTITUDE

To be fully leveraged, you must have people capable of replacing you!

Since there are only **eight** key positions, you must **hire** people with a **leadership** attitude.



The person who fills each position on the team must take **complete** ownership of the mission and vision for that position.

Furthermore, they must fully understand and value how their position **relates** to the **overall** success of the team.

Your expectation is that each team member will **consistently** work to **improve** the systems and strategies utilized in the position.

Each team member must make a personal **commitment** to consistently study and practice with the specific **intent** of getting better.

To ensure this, you must **promote** the concept of **mastery** (S-P-A-R).

HINT: Team members who **reject** mastery must be **replaced** immediately, as they will **prevent** the team from progressing.

BOTTOM LINE:

Team members must take complete **ownership** of their position and then work diligently to make the position **better**.

ACCOUNTABILITY

Accountability is a demonstration of care!

A **Lead Agent** who doesn't hold the team accountable doesn't **care** about the success of the team members or the team. (This one may **sting** a bit!)

THINK OF IT THIS WAY

Accountability = I want to **verify** that your behavior matches our expectations.

Accountability = I **care** about you and want to see you succeed.

Accountability = I want to **help** you create success habits.

Accountability = I want to **help** you remain on the path to success.

Talented people are passionate about succeeding, which is precisely why they want and often **demand** accountability.

WARNING: If your team members are not **demanding** to be held accountable then you probably have the **wrong** team!

People who ignore or **refuse** accountability are not **serious** about succeeding.

Holding someone accountable revolves around six simple questions:

1. What was your goal?
2. How did you do?
3. How do you feel about it?
4. What did you learn?
5. What's your revised goal?
6. What help do you need?

When holding team members accountable, focus on the following:

- Phase 1 - Effort (willingness to take action)
- Phase 2 - Process (adherence to the system)
- Phase 3 - Results (accomplishment of the desired outcome)

WARNING: Holding a new team member accountable for results **before** focusing on effort and process could result in **irreparable** damage!

TEAM MEETINGS

The primary focus of team meetings should be on how to improve as a team!

Don't **confuse** team meetings with accountability sessions.

Weekly team meetings are held to ensure everyone on the team is **focused** and clear on their **priorities** for the week.

Weekly team meetings are designed to promote and support team **synergy** as well as **reinforce** preferred and expected behaviors.

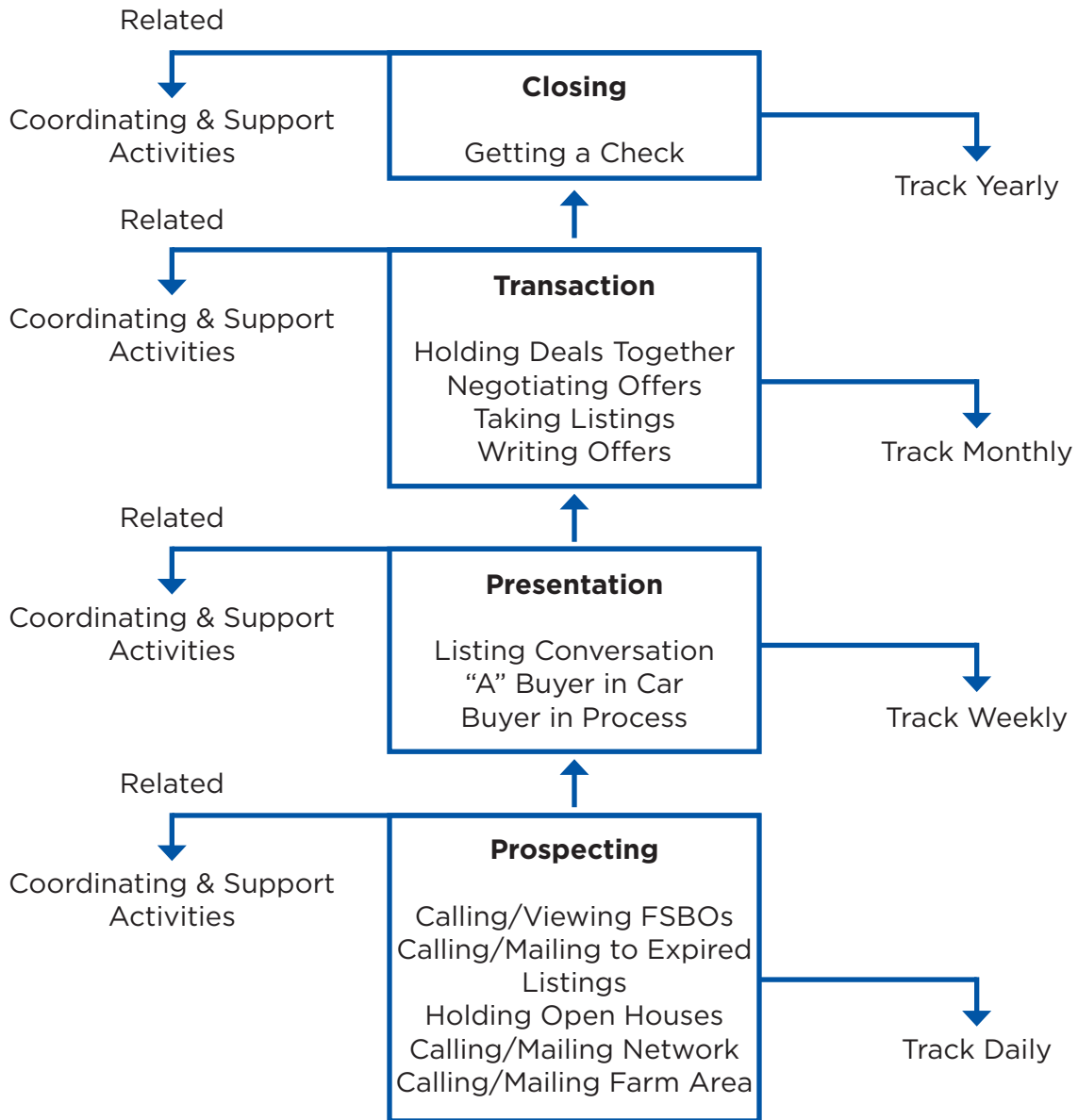
BASIC WEEKLY TEAM MEETING AGENDA

1. Review the team Mission, Vision, Values, Beliefs and Expectations (Meetings should **ALWAYS** begin this way. You can never over-communicate the core ideology of the team.)
2. Solicit examples of team members going above and beyond (exceeding pre-determined expectations) during the prior week (i.e. Ask them to share a story of exceeding someone's expectations last week.)
3. Review **priorities** for the upcoming week
 - a. Closings
 - b. Transactions
 - c. Conversations
 - d. Lead Generation
4. Ask if team members need help or **assistance** in fulfilling their responsibilities for the week and assign help accordingly
5. Reinforce a key value or belief. (Explain the importance and reasoning behind the value or belief and challenge team members to find ways to apply it in their roles.)
6. Inquire about intentional **improvements** made to each position (i.e. Ask how someone improved their position this past week. What will they intentionally improve this week?)
7. Adjourn with a positive and **inspiring** team message

TEAM MEETING TOOL

The real estate industry can look overwhelming if you don't understand priorities!

THE DOLLAR-PRODUCTIVE FOOD CHAIN



THE WEEKLY GOAL IS TO KEEP TEAM MEMBERS AT THEIR HIGHEST AND BEST USE!

14. COMPENSATE TEAM MEMBERS FAIRLY

Compensation is the way you say, “Thank you. Job well done!”

There’s only one rule when it comes to compensation — win-win!

The best compensation models not only **inspire** team members to excel, but also allow each to **share** in the growth and success of the team.

Team member compensation options include:

- Straight Salary
- Salary plus Profit Sharing
- Salary plus Performance Bonus
- Straight Commission
- Draw plus Commission

Other benefits include:

- 401(k) with Matching
- Health Insurance
- Disability Insurance
- Continuing Education
- Gym Memberships
- Vacation Time
- Personal Days Off

Team-building functions include:

- Family Picnics
- Movie Nights
- Holiday Parties
- Goal-Setting Retreats

Lead Agents should be open to **ANY** compensation plan that’s win-win. **Smart** business owners pay more attention to **return** than to cost.

COST vs. RETURN

Never look at cost. Always look at return!

Successful Entrepreneurs don't **waste** money. Instead, they view **each** business expense as an **investment** and hold it accountable for a specified rate of **return**.

HOW TO MAKE AN INFORMED, INTELLIGENT INVESTMENT DECISION

Dilemma: Should I hire a transaction coordinator?

Transaction Coordinator		\$45,000
Minimum ROI (30%)	x	1.30
Income Needed		\$58,500
Average Commission	÷	.03
Closed Production		\$1,950,000
Average Sales Price	÷	\$165,000
Transactions Needed		12

Question: Can you **generate** one transaction per month, **beyond** your current production, by delegating your administrative activities?

If "No." Don't make the hire. SPAR to improve your LG skills.

If "Yes." Congratulations, you just made a 30% return. Now calculate your EROI*

Transaction Expectation		24
Average GCI/Closing	x	\$4,950
Income Expectation		\$118,800
Total Salary	÷	45,000
*EROI (Expected Return on Investment)		164%

Question: Can you get a **better** return by investing the money elsewhere?

If "No." Make the investment!

If "Yes." Invest in the alternative. (Hint: Borrow more money and invest in both!)

15. RETAIN VIA GROWTH

You will never retain those who aspire to grow beyond the limitations of the team!

A big **concern** most Lead Agents have is not being able to **retain** talent.

This **scarcity** mentality stems primarily from the belief that **people** run the business.

As Michael Gerber stated in the EMyth Revisited, “People don’t run the business; **systems** run the business!”

You want your business to rely mainly on **systems**, not people!

HINT: If **systems** run your business, you don’t have to **worry** about people leaving! (You can **always** find other people to run your systems.)

The key question then becomes; do you own a “**plug-and-play**” business? In other words, do you have a **turnkey** sales business system?

The keys to retaining good people are:

1. Find people who completely buy-in to your ideology
2. Train them thoroughly on your system
3. Treat them as people of extreme importance
4. Hold them accountable to predefined and ever-evolving performance standards
5. Support their aspirations for growth and advancement

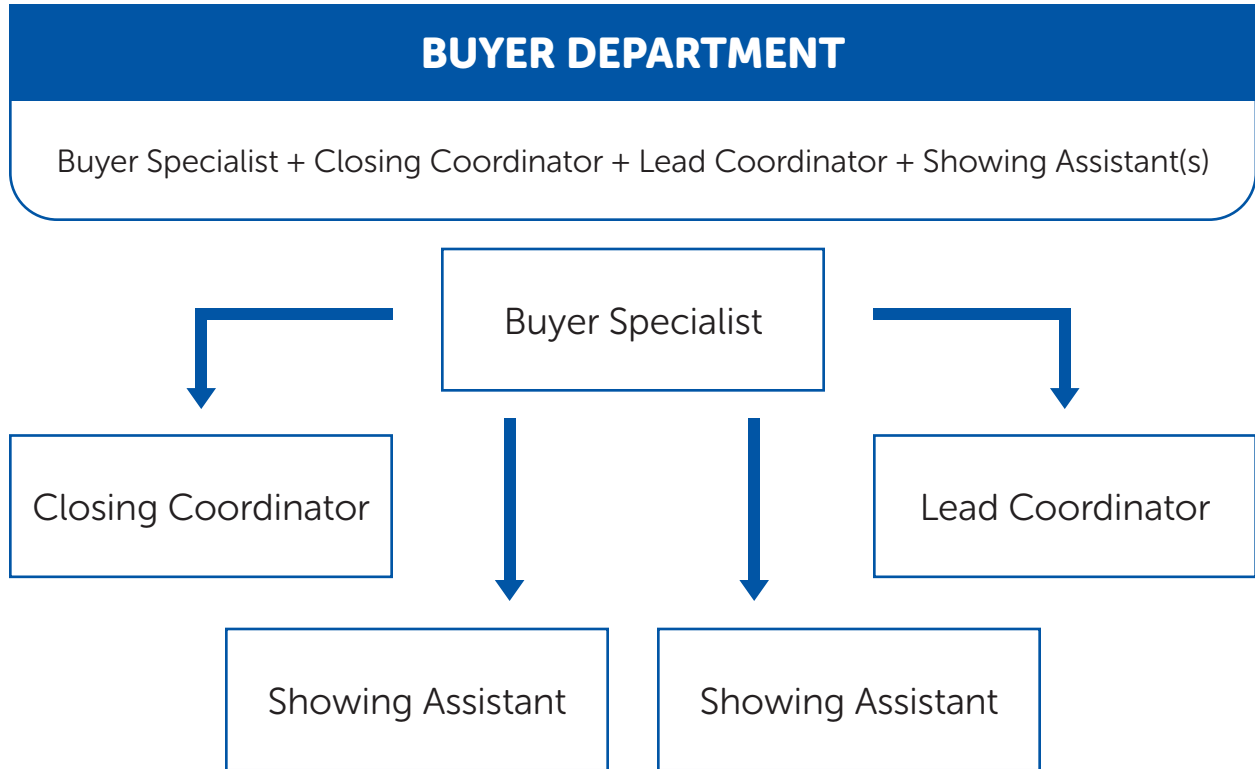
TEAMS THAT GROW ARE ABLE TO RETAIN!

One of the main benefits of building a team is having the ability to **expand** the Operational Model. Expanding the Operational Model provides **more** opportunities. More **opportunities** allow you to **retain** talented team members.

A lot of talented people **leave** teams because the Lead Agent doesn’t want to **grow** and evolve. When Lead Agents get comfortable and **content** with working leads **only** from their (and other team members) **sphere** of influence, they leave tons of money and **opportunities** on the table. If you are a **contented** Lead Agent, that’s ok - just know though that you are going to **lose** a lot of good people as a result.

A MOMENTUM EXAMPLE

**To retain talented Buyer Specialists,
allow them to grow within your team!**



Production Expectations:

- Solo Buyer Specialist = 36 Transactions
- Buyer Specialist + 1 Showing Assistant = 75 Transactions
- Buyer Specialist + 2 Showing Assistants = 150 Transactions
- Lead Coordinator = 15 Additional Appointments Set

Operational Process:

- All calls come to Lead Coordinator
- Lead Coordinator labels each lead and delegates to appropriate follow-up program
- All “Yes & Now” leads go immediately to Buyer Specialist
- Buyer Specialist facilitates initial meeting with prospects
- Clients and criteria are delegated to Showing Assistant
- Once house is found, Buyer Specialist writes and negotiates contract
- Accepted contract is passed to Closing Coordinator for closing preparation
- Buyer Specialist attends closing

Compensation Model:

- Buyer Specialist = 25 - 40%
- Showing Specialist = 10 - 25%
- Lead Coordinator = Hourly Wage + Bonus (\$15/set; \$25/meeting; \$100/closing)

SECTION 4 WRAP-UP

AHA'S:

ACTION ITEMS:

- 1. Perform a thorough assessment of your team and any positions that need to be filled and/or replaced.**
- 2. Study the Leverage Summit manual for effective hiring tools and strategies.**
- 3. Create and/or improve the operational systems for each position on the team.**
- 4. Train all team members to the systems of the position.**
- 5. Hold each team member accountable weekly using the pre-determined performance standards for each position.**
- 6. Hold weekly team meetings to keep the team focused.**

YOUR PRIORITY:

MASTER TEAM BUILDER SUMMARY

Highly Proficient Teams are built by design, not by coincidence!

20-steps to building and retaining a Highly Proficient Team:

1. Get “vital” (eliminate all operational waste by preparing a vital activities checklist)
2. Formulate a team mission
3. Create a team vision
4. Establish team values
5. Establish team beliefs
6. Establish team expectations
7. Advance your ideology until it’s internalized and revered by all team members
8. Calculate a team goal
9. Create a financial model
10. Create an operational model
11. Create an organizational model
12. Define key performance standards
13. Explain the team plan and importance of each person’s role in achieving the goal
14. Assess your current situation (ability to meet your money and time goals)
15. Hire/transfer the right people to the right positions
16. Train each team member thoroughly
17. Encourage team members to take ownership of their position
18. Evaluate the effort, process, and results of each team member
19. Compensate team members fairly
20. Promote an environment of improvement and growth

FINAL WARNING: A lot of you are going to use the fact that you’re doing “OK” as **reason** to avoid the activities recommended in this manual.

Q: Is your goal to just do “OK” or be **ALL** you can be?

HINT: Identify the **one** step that will make the **biggest** impact and **GO!**

BROKER BONUS

You can't teach a kid to ride a bike at a seminar!
- David Sandler

The following sessions make for excellent reinforcement training:

1. Establishing directional clarity through mission and vision
2. Establishing behavioral clarity through values, beliefs and expectations
3. Calculating a profit goal and creating an appropriate financial model
4. Creating appropriate operational and organizational models
5. Creating meaningful team performance standards
6. Assembling appropriate vital activities checklists
7. Building effective systems for each team function
8. Effective interviewing questions and techniques
9. Utilizing an activities management system
10. Helpful staff development techniques

**ONWARD IN BUILDING AND RETAINING
A HIGHLY PROFICIENT TEAM!**