



***mo*mentum** SM
MAXIMUM RESULTS

AGENT TRAINING
The Leverage Summit

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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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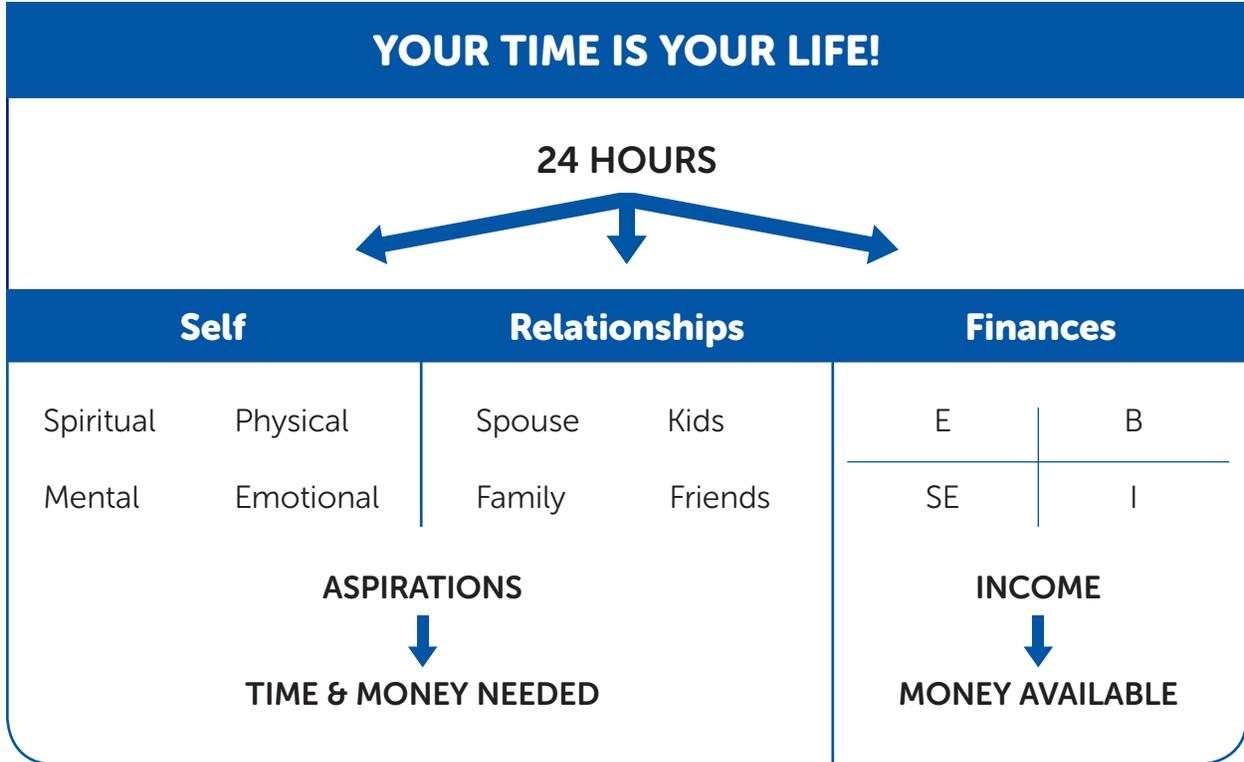
People assume everyone wants to reach their potential and be the best they can be ...

I've concluded most only want to be average and do just enough to get by!

- Nick Saban

WHY WORK?

Answer: _____



YOU DON'T LIVE TO WORK ... YOU WORK TO LIVE!

Creating an unlimited life of abundance requires both time and money

Earned Income
 ↓
 Work is a Necessity
 ↓
Money

Passive Income
 ↓
 Work is a Choice
 ↓
Time & Money

REMEMBER:

The goal is to live an unlimited life in a limited amount of time!

CHOOSING A CAREER PATH

**Two roads diverged in a wood, and I – I took the one less traveled by,
and that has made all the difference! – Robert Frost**

Full-time Realtors fall into one of four categories:

1. Typical Salesperson (remains in Phase 1)
2. Unique Salesperson (progresses from Phase 1 to Phase 2)
3. Typical Entrepreneur (jumps from Phase 1 to Phase 3, bypassing Phase 2)
4. Unique Entrepreneur (progresses from Phase 2 to Phase 3)

First you must establish your approach ...

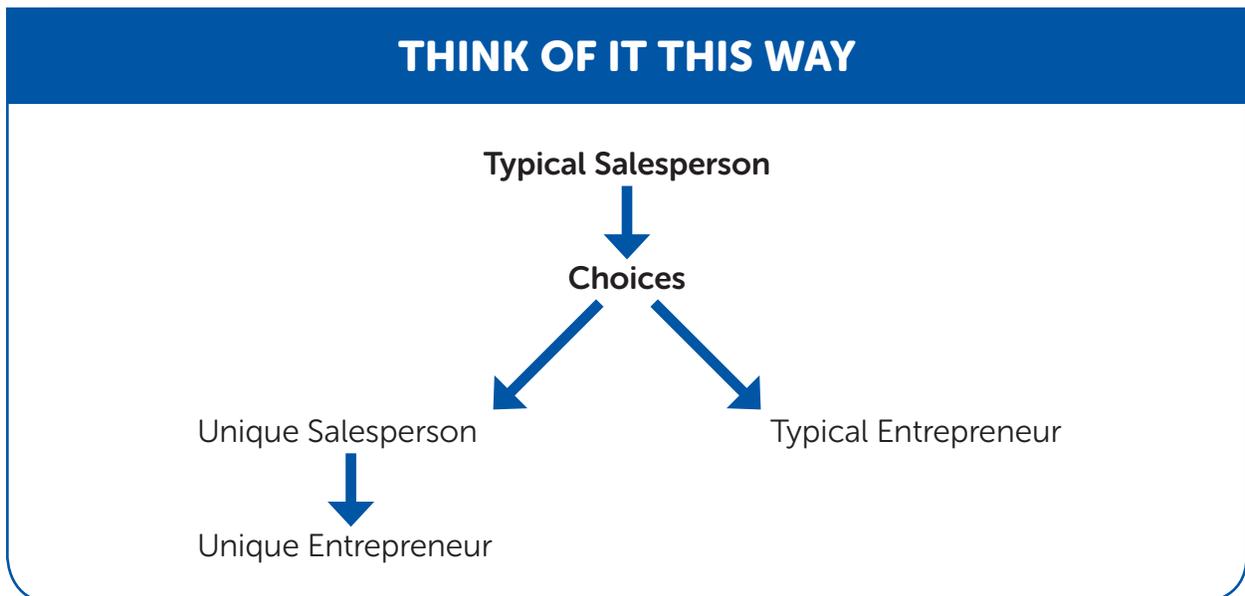
1. Typical (stays in comfort zone – spontaneous and reactive – easy and convenient)
2. Unique (seeks potential – intentional and proactive – challenging and rewarding)

... then you must determine your role:

1. Salesperson (focuses on job – all about “me” – gets rich)
2. Entrepreneur (focuses on business – leverage is the key – gets wealthy)

truth

Everyone begins as a **Typical Salesperson**



YOUR ONLY LIMIT IS TIME

Money is not the key asset in life; time is! – Gordon Gecko

Your career goal should be to make as much money as you can in the hours you are willing to invest. Understanding this concept and behaving accordingly is the first step toward creating and funding the life you aspire to.

Since time is indeed your ONLY limit in life, it should be viewed as a precious resource never to be squandered.

OFFICE MISSION

Day: 24 Hours Week: 168 Hours Month: 730 Hours Year: 8,760 Hours
Life: ????????????????

TOMORROW IS NOT GUARANTEED!

You are not guaranteed one more day on this earth, so you must make each and every day relevant by viewing it as an opportunity to progress and make a difference!

Remember, there is an opportunity cost associated with wasted time, so it's vital that you budget your time as you would your money.

THE COST OF WASTING 1 HOUR PER DAY, 6 DAYS PER WEEK

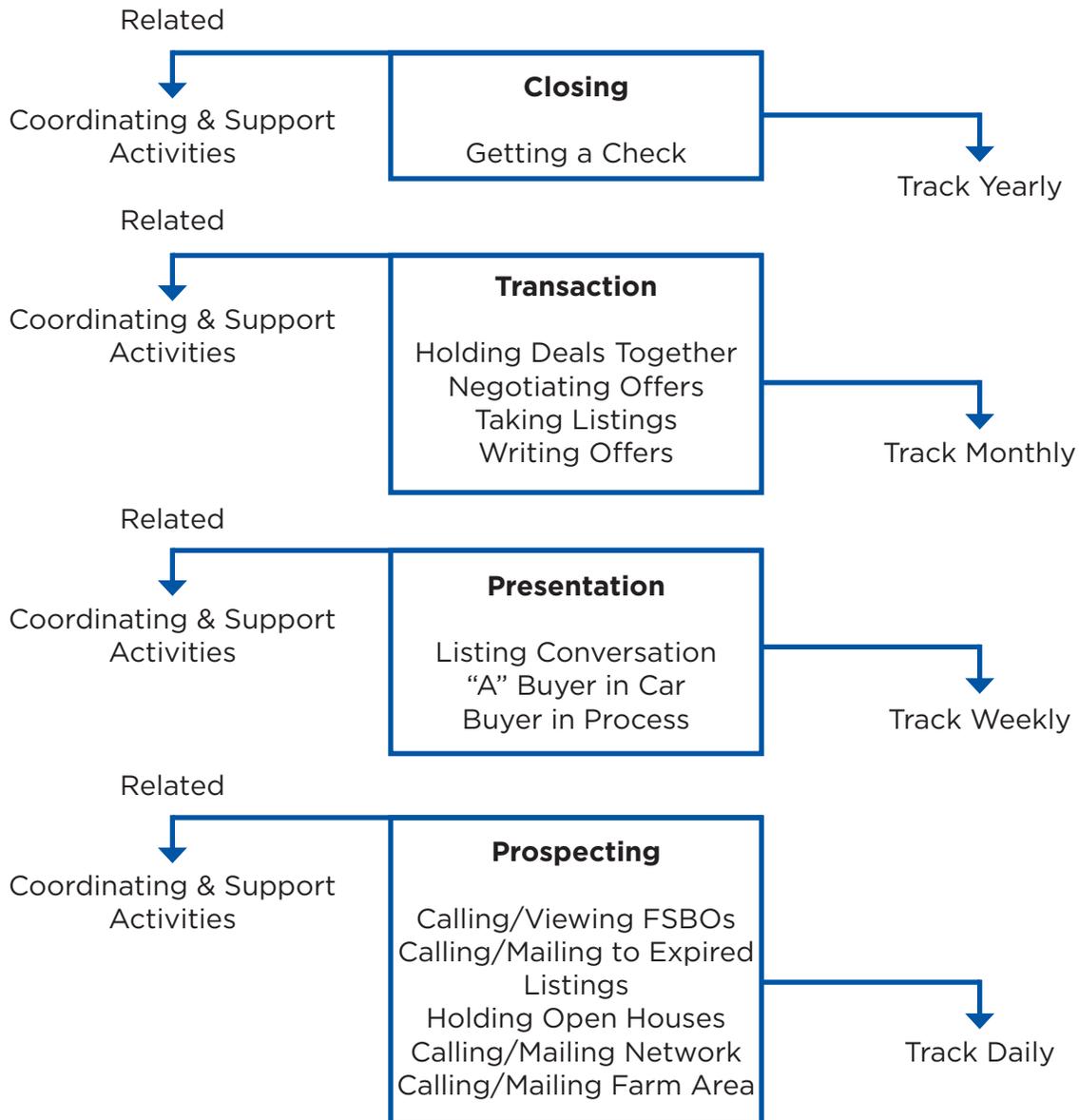
6 x 50 weeks = 300 hours/year
300 x 30 dials/hour = 9,000 additional listing dials
9,000 x 15% talk/dial conversion = 1,350 additional listing talks
1,350 x 10% appointment/talk conversion = 135 additional listing sets
135 x 80% show-up rate = 108 additional listing meetings
108 x 60% taken/appointment conversion = 65 additional listings taken
65 x 67% sold/taken conversion = 44 additional closed transactions
44 x \$5,000 (average GCI/closing) = \$220,000 additional gross commission income
\$220,000 x 65% = \$143,000 additional net income (after taxes and charity)
\$143,000 per year invested at 8% for 10 years = \$2,071,578 additional life-changing wealth

**THE GOAL IS TO BE AT YOUR HIGHEST
AND BEST USE FOR ANY HOUR INVESTED!**

OPERATING AT YOUR HIGHEST & BEST USE

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

THE DOLLAR-PRODUCTIVE FOOD CHAIN



ANY A-HA'S?

ELIMINATING PEAK & VALLEY RESULTS

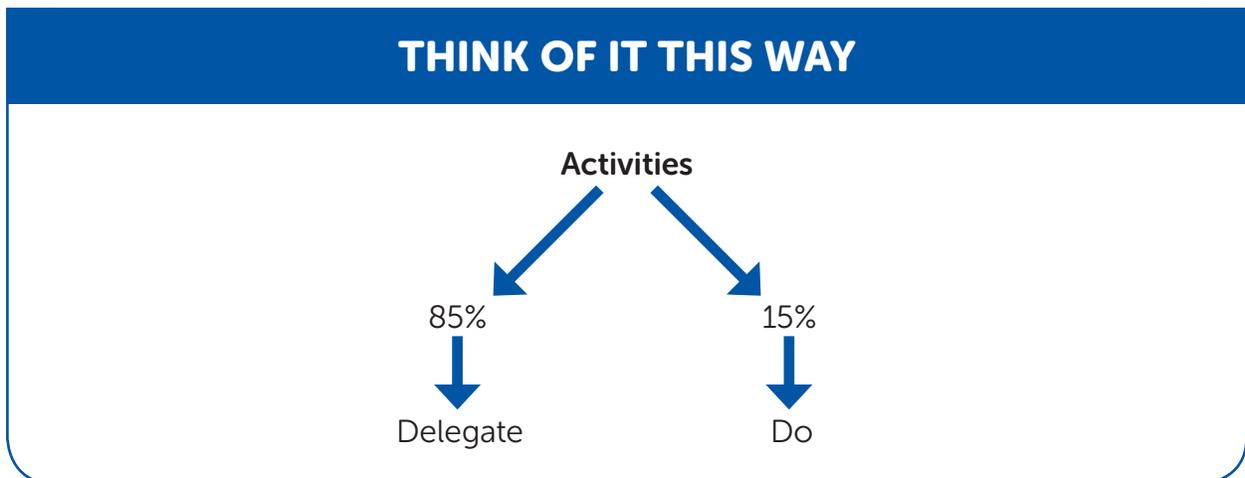
Don't be a "peak and valley" agent!

What's a peak and valley agent?

A "peak and valley" agent is one whose **focus shifts** from month to month! One month the focus is on securing a lead and the next month on the "stuff" it takes to close the transaction.

But the "stuff" must be done, right?

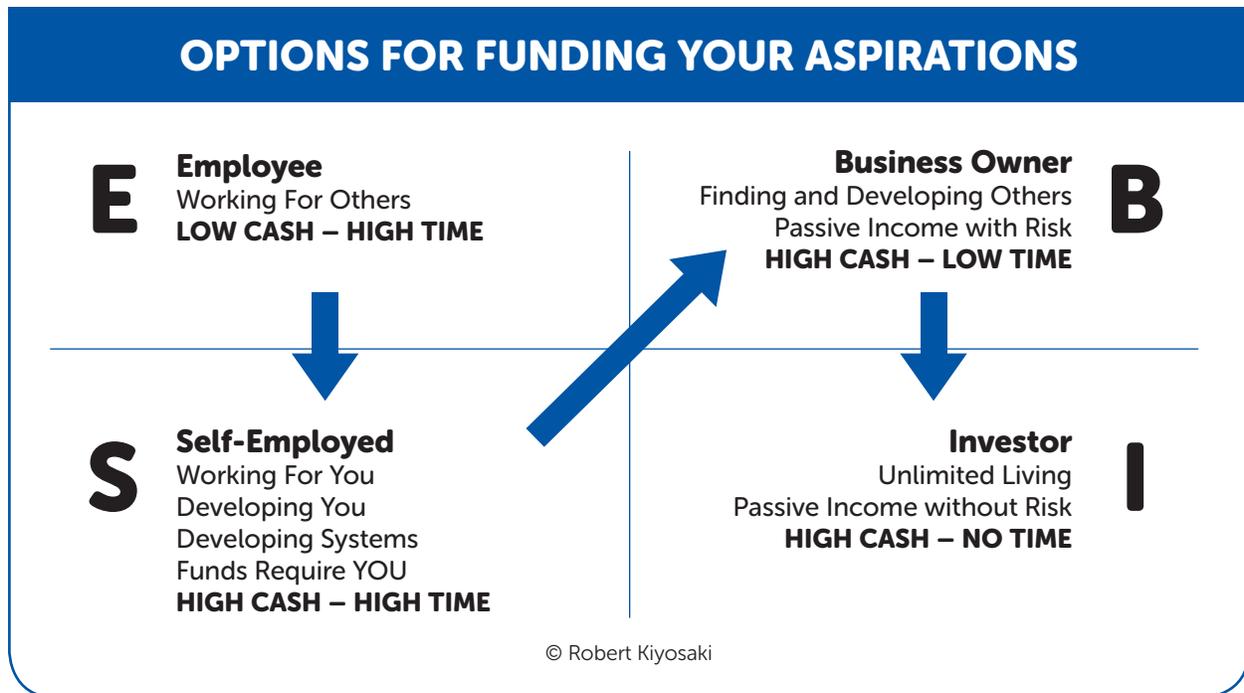
Sure. "**Vital stuff**" must be done. However, that's not the real issue! The key issue is **who's** going to do it? The moment you begin to think of time as precious and priceless, the **wealthier** you will become!



Your **willingness** to comprehend and adhere to this simple diagram can make the difference between massive success, mediocrity and failure.

LIVING AN ABUNDANT LIFE

If you want to live abundantly, you must generate enough **passive** income to fund the life you aspire to!



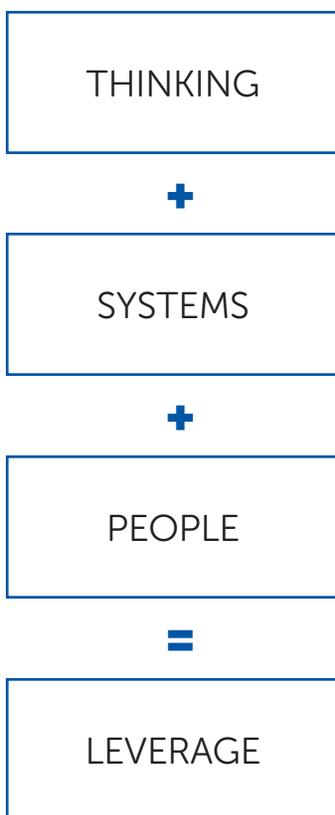
The only options that truly allow for an **abundant life** are on the right side of the graph. If you are employed by someone else, your salary will be limited by the amount your boss is willing to pay. If you're self-employed, your income will be limited by the number of hours you are willing and able to invest in your business.

NOTE:

If you truly wish to fund an unlimited life, you must **choose** a career that allows the opportunity to leverage others so you can generate passive income.

GETTING WEALTHY

There is only one success – to be able to spend your life in your own way!



First, you must **think** the way an abundant entrepreneur thinks

Second, you must establish **systems** to operate effectively and efficiently

Third, you must find and attract **people** who are willing and able to drive your systems

truth

Leverage is the key to abundance!

LET'S REVIEW

WHY DO YOU WANT TO DELEGATE?

Raise your right hand and repeat after me:

Because ...

1. I must make the most effective/efficient use of my time!
2. I must operate at my highest and best use at all times!
3. I must eliminate peak and valley results!
4. I must build a business that funds an abundant life!
5. I must be fully leveraged to create the wealth I deserve!

Now that you understand and accept these as your rules, we can move forward!

ORGANIZATIONAL EVALUATION

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

Abundance requires being **completely** leveraged. Thus, it's mandatory that you progressively delegate the tasks of the operational model to a complete and highly functional staff.

THE 8 KEY POSITIONS OF AN ABUNDANT AGENT

Dollar-Productive Positions:

1. Listing Specialist
2. Buyer Specialist

Administrative Positions:

3. Team Leader
4. Listing Coordinator
5. Closing Coordinator
6. Marketing Coordinator
7. Administrative Assistant
8. Runner

YOU ARE 8 HIRES AWAY FROM BEING COMPLETELY LEVERAGED!

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?

truth

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

DON'T BE TYPICAL

A chain is only as strong as its weakest link!

Below is an example of how **typical salespeople** assemble a team.

DON'T BE TYPICAL!

I desperately need someone for this position (because I don't want to do it).
Hey, you seem capable. Will you work on the cheap?
Great, the job is yours!
I assume you know what to do! or Go to this class; he'll tell you what to do.
Call me if there is a problem.
Hurray! I'm freeeeeeeeee!

Don't just hire, abdicate and hope for the best! Your goal is to assemble a **world-class** staff of highly functional, self-managed professionals capable of **replacing** you.

THE 5 BIGGEST MISTAKES AGENTS MAKE WHEN ADDING STAFF

1. Hire too soon (expanded inefficiencies)
2. Hire the wrong person (no hiring plan or system)
3. Provide little or no staff development (C-T-A)
4. Abdicate position immediately after filling (earn the right)
5. Refuse to create a team environment (me to we)

AVOID THESE PITFALLS AND YOU'LL BE WELL ON YOUR WAY TO REACHING YOUR POTENTIAL AND LIVING A SUCCESSFUL LIFE!

REMEMBER:

The third and highest form of leverage is **succeeding through others**. However, you must be willing to follow a proven hiring system **and** provide complete staff development to attract and maintain the relationships required for long-term success.

WHEN TO HIRE

Just because you can doesn't mean you should!

A common question is "When should I hire help?"

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 developed duplicable systems that can be delegated (your results are by design and not by accident).

REMEMBER:

Going to the next level **requires** one of two things:

You personally doing more

or

You leveraging yourself through others

The **choice** you make will determine whether you ultimately build a "business" or forever keep a "job"!

WHO TO HIRE FIRST

There is a method to the madness!

The order of delegation is as follows:

- First - Vital **Administrative** Activities
- Second - Vital **Buyer** Dollar-Productive Activities
- Third - Vital **Listing** Dollar-Productive Activities

TIER 1 BUSINESS = 50 HOURS YOU = 50 HOURS

You

TIER 2 BUSINESS = 90 HOURS YOU = 50 HOURS

You
Transaction Coordinator

TIER 3 BUSINESS = 140 HOURS YOU = 50 HOURS

You, Buyer Specialist
Transaction Coordinator

TIER 4 BUSINESS = 200-250 HOURS YOU = 50 HOURS

You, Buyer Specialist(s)
Listing Coordinator, Closing Coordinator, Runner

TIER 5 BUSINESS = 240-300 HOURS YOU = 50 HOURS

You, Buyer Specialist(s)
Listing Coordinator, Closing Coordinator, Marketing Coordinator, Runner

TIER 6 BUSINESS = 280-430 HOURS YOU = 30 HOURS

You, Listing Specialist(s), Buyer Specialist(s)
Listing Coordinator, Closing Coordinator, Marketing Coordinator, Admin. Asst., Runner

TIER 7 BUSINESS = 330-550 HOURS YOU = 5 HOURS

You, Team Leader, Listing Specialist(s), Buyer Specialist(s)
Listing Coordinator, Closing Coordinator, Marketing Coordinator, Admin. Asst., Runner,
Ancillary Businesses

TIER 8: BUSINESS SUMMIT

Agent Franchising - Passive Income via Franchising SYSTEMS for a Tier 7 business

TALENT IS THE KEY!

Systems run the business; people run the systems! – Michael Gerber

You are interested in filling **each staff position** with a highly qualified and motivated professional seeking a long-term career **partnership**, not an under-qualified and unmotivated employee searching for a weekly paycheck.

Instead of settling for just anyone, go on a proactive search for talent!

WHO IS “TALENT”?

Someone who is a **superb match for the job description** AND possesses the knowledge, skills, disposition and behavioral style required by the position.

FINDING AND ATTRACTING TALENT REQUIRES TIME, ENERGY, EFFORT AND PATIENCE.

“That sounds expensive!”

THINK OF IT THIS WAY

IS IT...

When I have the money, I will hire talent!

OR

When I hire talent, I will have the money!

IT’S YOUR DECISION!

COST vs. RETURN

Most agents who consider becoming employers believe that hiring someone will solely **cost** them money. This is only true if you hire the **wrong person**.

NEVER LOOK AT COST. ALWAYS LOOK AT RETURN!

Full-Time Coordinator:		\$45,000
Minimum ROI (30%)	x	1.30
Income Needed		\$58,500
Commission (1/2 side)	÷	.03
Closed Production		\$1,950,000
Average Sales Price	÷	\$165,000
Transactions Needed		<u>12</u> (One per month)

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

If "Yes." Congratulations, you just made a minimum 30% on your investment

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

truth

Talent isn't cheap, and expects to be paid accordingly.

truth

Talent, if **trained and held accountable**, will take ownership of his or her position.

truth

Talent will free your time, allowing you to focus on making more money and seeking more opportunities.

FIRST THINGS FIRST

To get the right person, you must first create a vision of the right person!

Since talent is defined as someone who is a superb match for the job description, it is **impossible** to hire talent without a job description! Thus, before anything else, you must create an organizational chart along with **job descriptions** for all positions identified on the chart.

Job Description – a specific list of **vital activities** for the position.

In addition to finding someone who is a superb match for the job description, you are also searching for someone who is **competent** to fill each position.

Competent candidates are those who not only possess the required knowledge, skills and disposition, but also are willing to be held **accountable** to pre-established performance standards.

KEY COMPETENCIES

Knowledge – Appropriate education, licensing and understanding

Skills – The ability to perform to the standards of the job

Disposition – Desired qualities of mind and character

Performance Standards – Defined by the desired results for the position

NOTE:

When hiring someone to fill a leadership position (TL, LS, BS) you must look beyond talent. The person must be **mature** enough for the position, **credible** enough for the position and possess a high level of **integrity**. Talent alone will allow a person to master the tasks of the role but won't, by itself, inspire a person to follow you.

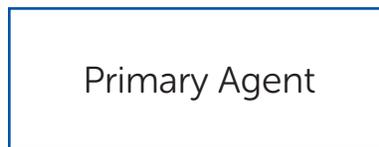
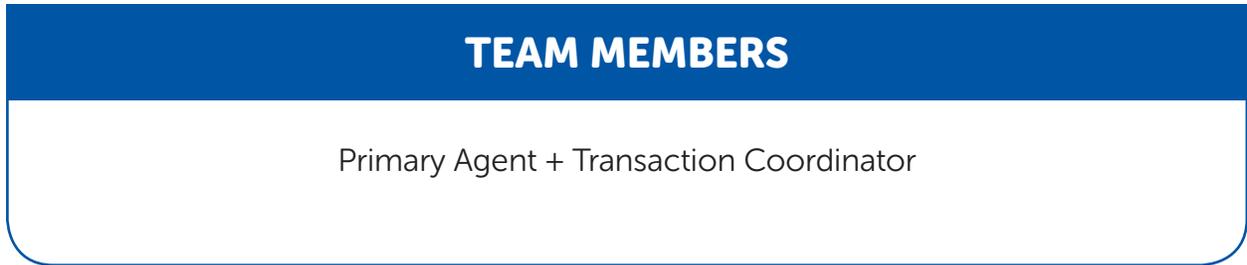


Assembling job descriptions and key competencies provides a clear definition of the **right person** for each position.

The following are examples of organizational charts, job descriptions and key competencies.

ORGANIZATIONAL CHART

Tier 2



JOB DESCRIPTIONS

Tier 2

PRIMARY 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)

JOB DESCRIPTIONS (continued)

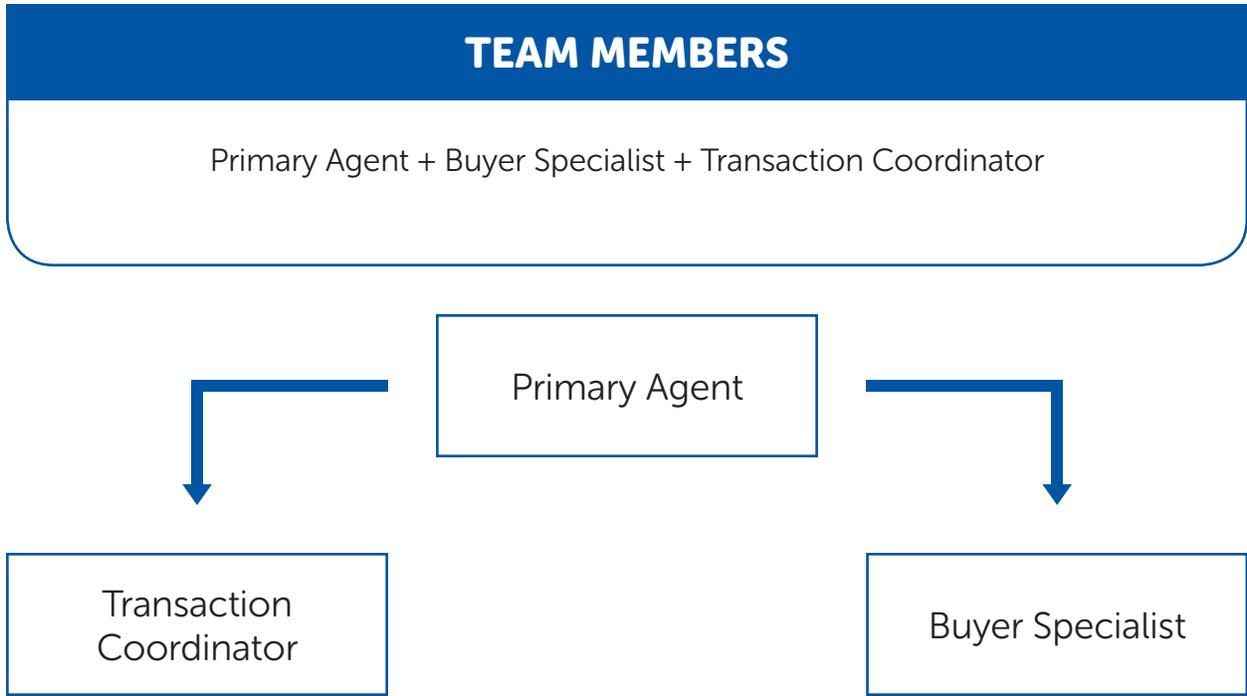
Tier 2

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)

ORGANIZATIONAL CHART

Tier 3 (Triangular Model)



JOB DESCRIPTIONS

Tier 3

PRIMARY 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)
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- Obtain HOA Information from Seller (S)
- Deliver Home Fliers (S)
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- 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)

JOB DESCRIPTIONS (continued)

Tier 3

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)
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- Visit For Sale by Owners (LG)
- Hold Open Houses (LG)
- Call/Visit Neighbors around Just-Listed Properties (LG)

JOB DESCRIPTIONS (continued)

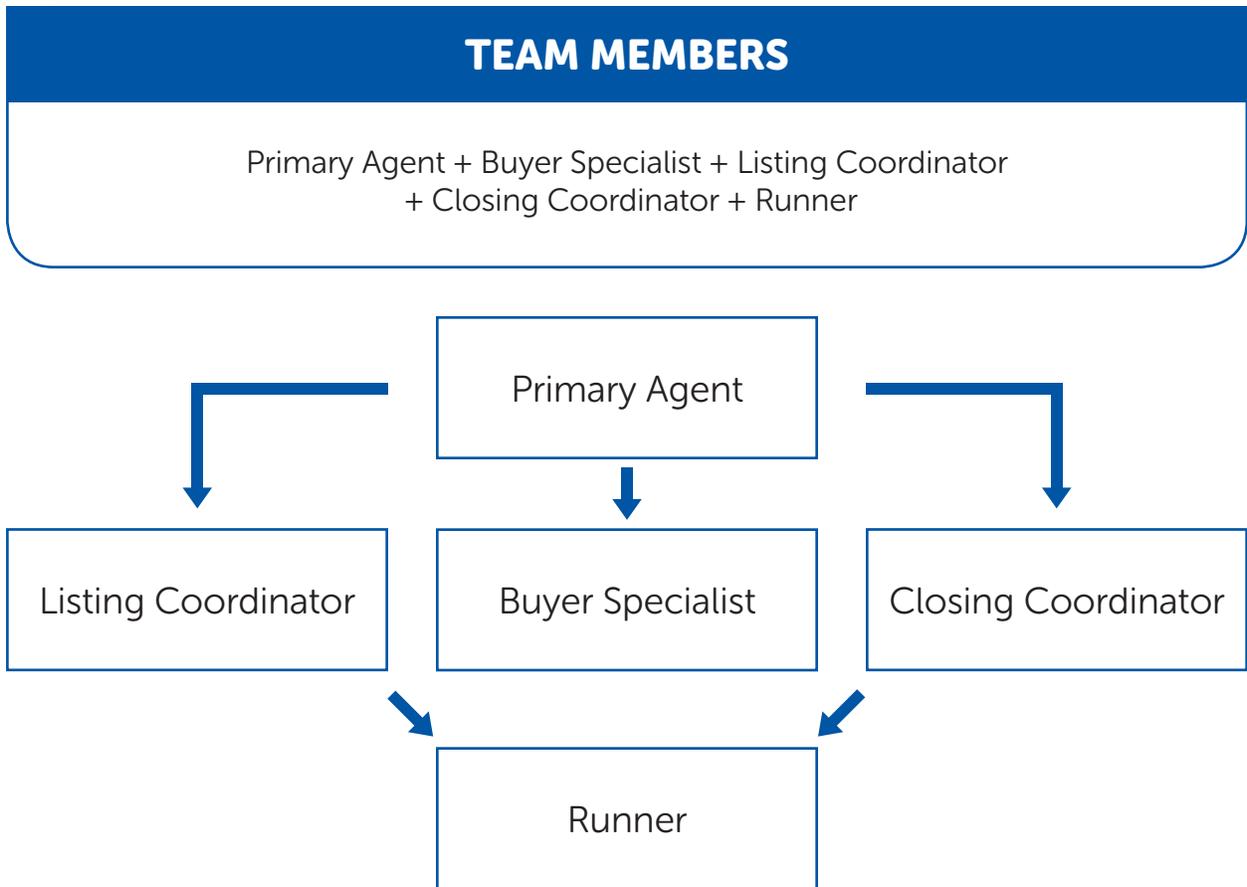
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- Order/Maintain Office Supplies (OA)
- Back-up Computer Files on a Weekly Basis (OA)
- Create/Update Vendor List (OA)

ORGANIZATIONAL CHART

Tier 4



JOB DESCRIPTIONS

Tier 4

PRIMARY 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)

JOB DESCRIPTIONS (continued)

Tier 4

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)

JOB DESCRIPTIONS (continued)

Tier 4

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)

JOB DESCRIPTIONS (continued)

Tier 4

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)

JOB DESCRIPTIONS (continued)

Tier 4

CLOSING COORDINATOR

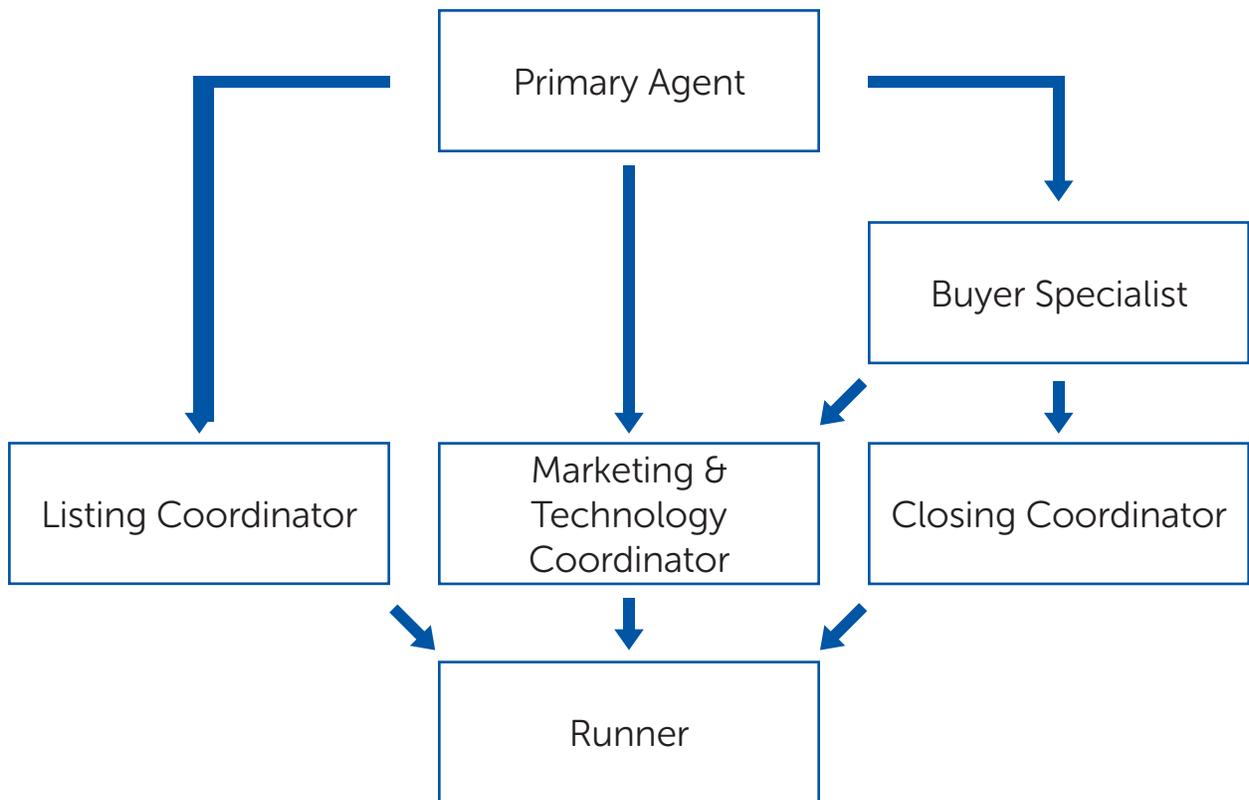
- Attend Weekly Team Meeting (T&D)
- Make Copies (S)
- Mail Buyer Surveys (S)
- Mail Homestead Exemption Forms to Buyers (S)
- Mail HUD 1 Statements to Buyers (S)
- Mail Customer Surveys (S)
- Coordinate Closing Gifts for Buyers (S)
- Secure Property Owner's Insurance and Home Warranty (S)
- Contact 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)

ORGANIZATIONAL CHART

Tier 5

TEAM MEMBERS

Primary Agent + Buyer Specialist + Listing Coordinator
+ Closing Coordinator + Marketing Coordinator + Runner



JOB DESCRIPTIONS

Tier 5

PRIMARY 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)

JOB DESCRIPTIONS (continued)

Tier 5

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)

JOB DESCRIPTIONS (continued)

Tier 5

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)

JOB DESCRIPTIONS (continued)

Tier 5

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)

JOB DESCRIPTIONS (continued)

Tier 5

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)

JOB DESCRIPTIONS (continued)

Tier 5

RUNNER

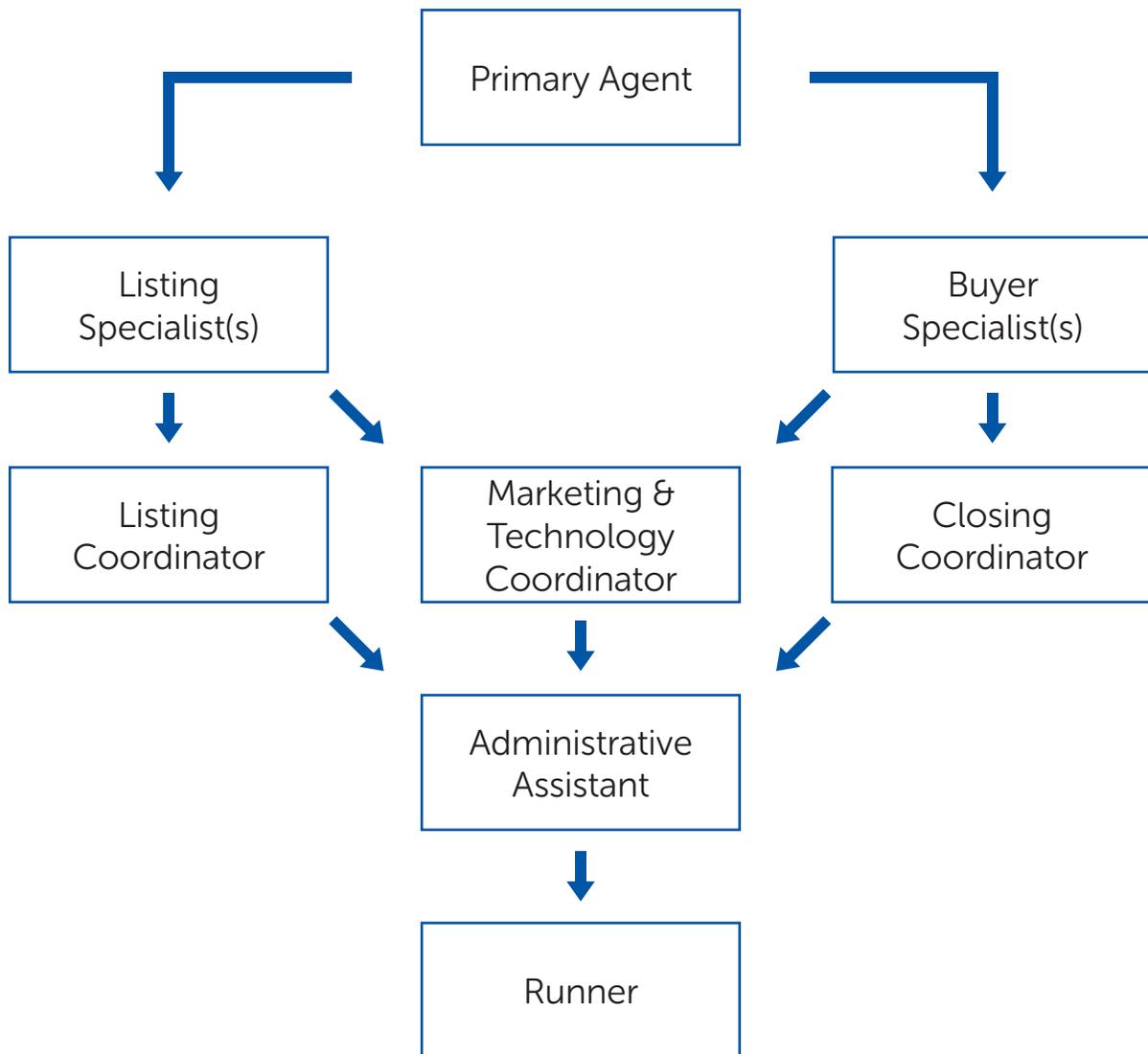
- Attend Weekly Team Meeting (T&D)
- Deliver Contracts (S)
- Deliver Amendments to Mortgage/Title Company (if necessary) (S)
- Deliver Home Fliers (S)
- Make Separate Set of House Keys (S)
- Place/Remove Lockboxes (S)
- Place/Remove Signs (S)
- Take Pictures of Interior/Exterior (S)
- Take Room Measurements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

ORGANIZATIONAL CHART

Tier 6

TEAM MEMBERS

Primary Agent + Listing Specialist + Buyer Specialist + Listing Coordinator
+ Closing Coordinator + Marketing Coordinator + Administrative Assistant + Runner



JOB DESCRIPTIONS

Tier 6

PRIMARY 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)

JOB DESCRIPTIONS (continued)

Tier 6

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)

JOB DESCRIPTIONS (continued)

Tier 6

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)

JOB DESCRIPTIONS (continued)

Tier 6

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)

JOB DESCRIPTIONS (continued)

Tier 6

ADMINISTRATIVE ASSISTANT

- 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

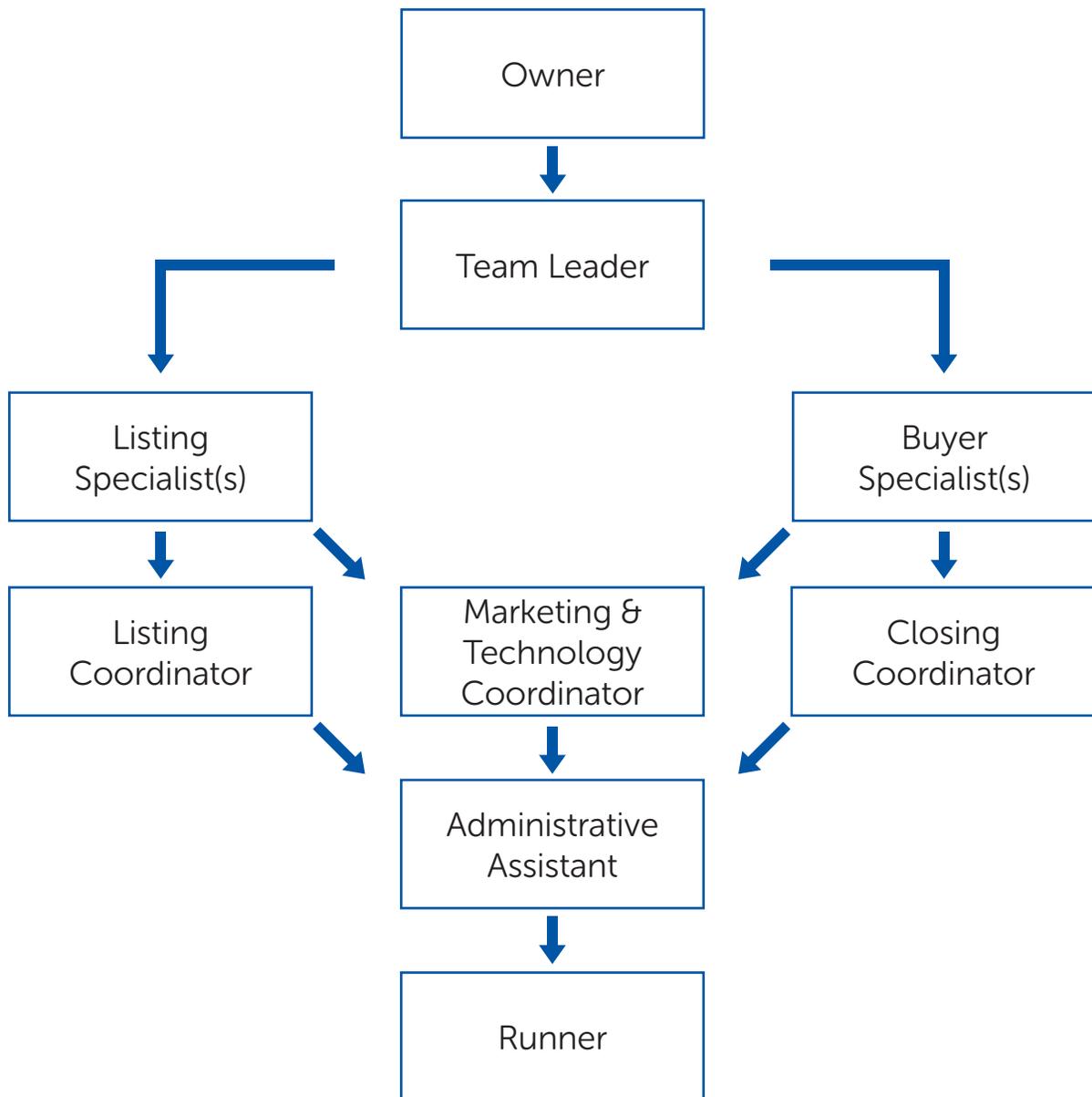
- Attend Weekly Team Meeting (T&D)
- Deliver Contracts (S)
- Deliver Amendments to Mortgage/Title Company (if necessary) (S)
- Deliver Home Fliers (S)
- Make Separate Set of House Keys (S)
- Place/Remove Lockboxes (S)
- Place/Remove Signs (S)
- Take Pictures of Interior/Exterior (S)
- Take Room Measurements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

ORGANIZATIONAL CHART

Tier 7

TEAM MEMBERS

Team Leader + Listing Specialist + Buyer Specialist + Listing Coordinator
+ Closing Coordinator + Marketing Coordinator + Administrative Assistant + Runner



JOB DESCRIPTIONS

Tier 7

TEAM LEADER

- 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 Meetings (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)

JOB DESCRIPTIONS (continued)

Tier 7

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)

JOB DESCRIPTIONS (continued)

Tier 7

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)

JOB DESCRIPTIONS (continued)

Tier 7

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)

JOB DESCRIPTIONS (continued)

Tier 7

ADMINISTRATIVE ASSISTANT

- 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 Supplies (OA)
- Back-up Computer Files on a Weekly Basis (OA)
- Create/Update Vendor List (OA)
- Assist Closing Coordinator and Listing Coordinator As Needed

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)

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	<p>Intellectual: Intelligence Analysis Skills Judgment Decision Making Conceptual Ability Creativity Pragmatism Leading Edge Education</p> <p>Personal: Integrity Initiative Organization Planning Charm Self-Awareness Energy Enthusiasm Independence</p> <p>Interpersonal: First Impression Likability Listening Team Player Customer Focus Assertiveness Persuasion</p> <p>Leadership: Inspiration Ambition Goal Setting Accountable</p>	<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. • Communicate with sellers via weekly phone call • Take 1 new listings per week • Meet with 2 sellers per week • Set 3 listing meetings per week • Master listing dialogue • Follow up on all seller leads w/in 12 hrs • Call 100+ residents in farm area per week • Call 50+ expired listings per week • Call 200+ neighbors around just-sold properties per week • Attend all listing related training • Attend all weekly staff meetings • Review performance with T/L weekly

BUYER SPECIALIST

Knowledge	Skills	Disposition	Performance Standards
Sales Contracts Sales Addenda R/E Finance Buyer Process Pricing Geographic Area MLS Software	Communication Conversation Negotiation Strategic Analysis Computer Calculator	<p>Intellectual: Intelligence Analysis Skills Judgment Decision Making Conceptual Ability Creativity Pragmatism Education</p> <p>Personal: Integrity Organization Planning Charm Self-Awareness Energy Enthusiasm Independence</p> <p>Interpersonal: First Impression Likability Listening Team Player Customer Focus Assertiveness Persuasion</p> <p>Leadership: Inspiration Ambition Goal Setting 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 per week • Attend 2 buyer meetings per week • Set 3 buyer meetings per week • Put all prospects through buyers process • Show homes to only "A" buyers • Master buyer dialogue • Follow up on all ad and sign calls w/in 12 hrs. • Hold 1 open house per week • Call 50+ tenants in apartment complexes or move-up buyers per week • Visit 3+ FSBOs per week and follow up accordingly • Call 200+ neighbors around just-listed properties per week • Attend all buyer related training • Attend all weekly staff meetings • Review performance with T/L weekly

LISTING COORDINATOR

Knowledge

MLS Software
MS Office
Internet
Email

Skills

Communication
Computer
Data Entry
Filing

Disposition

Intellectual:

Intelligence
Decision Making
Experience
Education

Personal:

Integrity
Organization
Planning
Independence
Stress Management
Energy

Interpersonal:

Customer Focus
Team Player
Listening

Leadership:

Goal Setting
Accountable

Performance Standards

Maintain Inventory:

10 Pre-List Packages
10 Cons. Packages

Out Within 24 hrs:

Pre-Listing Guide
Letters/Notes
Just-Listed Cards
Customer Survey
Confirm Appt.
Seller Surveys
MLS Data Entry

In Within 24 hrs:

HOA Info.
Loan Payoff Info.
Listing Feedback

Contact Within 24 hrs:

Showing Service
Confirming Calls

Weekly Contacts:

Pending Sellers
Title Company

Other:

Attend all weekly
staff meetings

CLOSING COORDINATOR

Knowledge	Skills	Disposition	Performance Standards
<p>MLS Software MS Office Internet Email</p>	<p>Communication Computer Calculator Data Entry Filing</p>	<p>Intellectual: Intelligence Decision Making Experience Education Personal: Integrity Organization Independence Stress Management Energy Interpersonal: Customer Focus Team Player Listening Leadership: Goal Setting Accountable</p>	<p>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</p>

MARKETING COORDINATOR

Knowledge	Skills	Disposition	Performance Accountabilities
<p>MLS Software MS Office MS Publisher Internet Email</p>	<p>Communication Computer Writing</p>	<p>Intellectual: Intelligence Decision Making Analysis Creativity Education</p> <p>Personal: Integrity Planning Organization Independence Energy</p> <p>Interpersonal: Team Player Likability Listening Customer Focus Persuasion</p> <p>Leadership: Goal Setting Accountable</p>	<p>Maintain lead generation call lists daily</p> <p>Deliver 33-Touch, 16-Touch, & 8-in-8 on appropriate dates</p> <p>Order home fliers w/in 24 hrs.</p> <p>Update client database w/in 24 hrs.</p> <p>Update social networks w/in 24 hrs.</p> <p>Coordinate all weekend open houses by preceding Tuesday</p> <p>Mail neighborhood update cards monthly</p> <p>Attend weekly staff meetings</p>

ADMINISTRATIVE ASSISTANT

Knowledge	Skills	Disposition	Performance Accountabilities
<p>Phones Fax Copier Internet Email</p>	<p>Communication Computer Phone</p>	<p>Intellectual: Intelligence Personal: Integrity Organization Planning Independence Stress Management Enthusiasm Energy Interpersonal: Likability First Impressions Listening Customer Focus Team Player Leadership: Goal Setting Accountable</p>	<p>Update website and check email 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>

RUNNER

Knowledge	Skills	Disposition	Performance Accountabilities
Geographic Area	Communication Driving	Intellectual: Intelligence Personal: Integrity Organization Planning Independence Enthusiasm Energy Interpersonal: Likability First Impressions Customer Focus Team Player Leadership: Goal Setting Accountable	Place/remove signs and lockboxes w/in 24 hrs. Measure rooms w/in 24 hrs. Take pictures w/in 24 hrs. Deliver contracts, fliers and 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

PRE-SEARCH PREPARATION

Before searching for talent, you must be prepared!

Once your **organizational evaluation** reveals a need to add and/or upgrade, you must properly **prepare** yourself for the hiring process.

INTERVIEWING TOOLS

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

Assembling (you don't have to create anything) the above tools for an effective interview demonstrates you are **serious** about putting the right person in the right position for the right reasons.

FINDING TALENT

Typically, talent is not unemployed, looking for a job!

Once you have assembled all of your interviewing tools, it's time to search for and **find** the talent you desire!

NOTE

There is a fundamental difference between finding and attracting talent!

Finding = Locating it

Attracting = Moving it into a relationship with you

When locating talent, try the following places:

1. Your Competition
2. Real Estate Schools
3. Network Sources (S.O.I.)
4. Allied Resources (Preferred Vendors)
5. Career Placement Services
6. Local Universities or Junior/Community Colleges
7. Advancement from Within
8. Headhunter
9. Internet Job Sites
10. Newspaper

HINT:

Ready or not, you should **ALWAYS** be on the lookout for talent!

ATTRACTING TALENT

Hiring a highly functional staff requires a three-part, 12-step system!

INTERVIEW 1

1. Application and Evaluation Forms
2. Rapport and General Questions
3. Your Story and Mission
4. Reference Checks

INTERVIEW 2

5. Position-Specific Questions
6. Position-Specific Tests
7. Reference Review
8. Behavior Review
9. Budget Review and Career Vision
10. Win-Lose and Mutual Expectations

INTERVIEW 3

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

This process is comprised of **12 interdependent steps**. One step alone does not confirm a successful candidate. You must stay curious and ensure each step **validates** the others!

During the entire process you are on a **“red flag”** mission. Once a red flag appears, you must stay curious until you are convinced the issue/concern has been resolved. Keep asking questions until you have a **clear** understanding of “what” the candidate is, “who” the candidate is and “why” the candidate is. You are searching for people who share your values and beliefs. This will show up (or not) when you ask them to explain the decisions they’ve made in their lives.

NOTE: Don’t “fall in love” with the candidate; fall in love with the process. Simply put, you must have a **hiring system** that guarantees you hire the **right person** for each staff position.

INTERVIEW ONE

1. APPLICATION FORMS

Before you meet with the candidate, have her complete the following forms in the conference room:

- **General Application**
- **Reference Sheet**
- **Job History**
- **Behavioral Assessment**

Have the receptionist greet candidates and move them to the appropriate meeting room.

Let each candidate sit alone in the conference room while completing the forms. It should take the candidate approximately 30 minutes to complete all forms.

RECEPTIONIST SCRIPT

Hello (Name), (Your Name) is expecting you! This is where you will be meeting; so set your things down and make yourself at home. Before (Your Name) comes in, could you please take some time and complete these forms. If you have any questions, please don't hesitate to open the door and ask me. When you are finished, just let me know and I will inform (Your Name). May I offer you something to drink? It would be my pleasure!

REFERENCES

Please list five personal references we can contact within the next week. (Do not list previous or current employers.)

PERSONAL

Reference Name	Phone	Relationship
----------------	-------	--------------

Reference Name	Phone	Relationship
----------------	-------	--------------

Reference Name	Phone	Relationship
----------------	-------	--------------

Reference Name	Phone	Relationship
----------------	-------	--------------

Reference Name	Phone	Relationship
----------------	-------	--------------

I give my permission to check references listed and others whom they may refer.

Signature

Date

EMPLOYMENT HISTORY FORM 1

Current/Most Recent Employer

Start Date

End Date

Location

Type of Business

Title

Starting Salary

Ending Salary

Responsibilities

Accomplishments

Lessons Learned

Most Enjoyable Moments/Activities

Reason for Leaving

Supervisor's Name

Title

Phone Number

Permission to Contact?

Signature

EMPLOYMENT HISTORY FORM 2

Current/Most Recent Employer

Start Date

End Date

Location

Type of Business

Title

Starting Salary

Ending Salary

Responsibilities

Accomplishments

Lessons Learned

Most Enjoyable Moments/Activities

Reason for Leaving

Supervisor's Name

Title

Phone Number

Permission to Contact?

Signature

EMPLOYMENT HISTORY FORM 3

Current/Most Recent Employer

Start Date

End Date

Location

Type of Business

Title

Starting Salary

Ending Salary

Responsibilities

Accomplishments

Lessons Learned

Most Enjoyable Moments/Activities

Reason for Leaving

Supervisor's Name

Title

Phone Number

Permission to Contact?

Signature

EMPLOYMENT HISTORY FORM 4

Current/Most Recent Employer

Start Date

End Date

Location

Type of Business

Title

Starting Salary

Ending Salary

Responsibilities

Accomplishments

Lessons Learned

Most Enjoyable Moments/Activities

Reason for Leaving

Supervisor's Name

Title

Phone Number

Permission to Contact?

Signature

EMPLOYMENT HISTORY FORM 5

Current/Most Recent Employer

Start Date

End Date

Location

Type of Business

Title

Starting Salary

Ending Salary

Responsibilities

Accomplishments

Lessons Learned

Most Enjoyable Moments/Activities

Reason for Leaving

Supervisor's Name

Title

Phone Number

Permission to Contact?

Signature

2. RAPPORT/GENERAL QUESTIONS

When you first enter the conference room, both parties are a little nervous so it's important to "break the ice"!

BASIC INTRODUCTION

Hi! I'm (Your Name), it's a pleasure meeting you! Did you have any problems finding the office? It's kind of warm, wet, cold, nice, etc., out there isn't it?

After you have introduced yourself, inform the candidate of your approach to hiring and intentions with Meeting #1.

SETTING THE STAGE DIALOGUE

I want you to understand that I am extremely serious when it comes to adding people to our team! My goal is to form win-win relationships with the people I associate with, as I feel only good things can come from those types of relationships! Would you agree? Great!

My approach to hiring is a three-interview approach, so what I would like to do today is simply get to know as much about you as I can and also tell you a little about me. Most of our meeting today will consist of me asking you questions and listening to your answers. Do you mind if I take notes? Today there are no right or wrong answers, and I want you to know that what gets said in here remains in here. Therefore, I want you to be as open and as honest with me as you feel you can be. Is that fair? Great!

NOTE:

Review **employment history forms** with candidate in addition to asking general questions.

GENERAL QUESTIONS

All Candidates

1. Tell me about yourself. Family? Recreation? Hobbies? (Rapport)
2. What formal education or seminars have you participated in? When? (Education)
3. Describe your reading habits. What is the best book you've read in the past 12 months? Why? (Education)
4. Describe a complex situation in which you had to learn a lot quickly. How did you go about learning and how successful were the outcomes? (Intelligence)
5. Are you computer literate? Describe the programs you are extremely capable in. (Technology)
6. Looking back in your career, what were your most and least successful jobs? (Track Record)

7. Describe a situation when the temptation to compromise your integrity was the strongest you've ever felt. (Integrity)

8. What kind of people do you enjoy working with? (Team Player)

9. Do you want to work as part of a team or on your own? (Team Player)

10. There are people who don't succeed in jobs. Why do you think people fail? (Values)

11. How will your references describe your work habits? (Energy)

12. What are a couple of the best and worst decisions you've made in recent years? (Self-Awareness)

13. How have you changed during recent years? (Adaptability) How many hours per week have you worked, on the average, during the past year? (Energy)

14. How many hours per week have you worked, on average, during the past year?
(Energy)

15. What motivates you? (Commitment)

16. How do you motivate yourself to do something really well that you don't like to do? (Commitment)

17. How much money do you need to be making in 12 months? 3 years? 5 years?
(Ambition)

18. What values do you live by? (Values)

19. How satisfied are you with your balance in life? (Balance)

20. Do you believe in goal setting and planning? Why? Are your goals written down?
Why? (Goal Setting) What are examples of the biggest challenges you have faced
and overcome? (Endurance)

21. What are examples of the biggest challenges you have faced and overcome?
(Endurance)

22. How much supervision do you want and need? (Independence)

23. If you were to arrange confidential reference calls with some of your past supervisors, what is your best guess as to what they would generally agree are your strengths and areas for improvement? (Self-Awareness)

24. How much feedback do you like to get from people you report to, and in what form (written, face to face)? (Accountable)

25. What is your vision of the “perfect” job? (Needs)

26. What is the one thing you are most proud of? Why? (Values)

NOTE:

Once answered, the above questions may require follow-up questions. The key is to stay curious until you have a complete and thorough understanding for what is being asked.

3. YOUR STORY AND MISSION

Once you've asked the final general question, **and want to continue**, it's time to reciprocate and tell the candidate some things about you. Remember it's a value-for-value proposition! Therefore, the purpose of your story is to reveal you have character, strength, success, perseverance, integrity and values. You want candidates to self-discover that being in business with someone like you will add value to their career and life!

Tell your story in chronological order. Thus, your story should lead right into your current situation. This makes the perfect place to share your company mission, vision, values, beliefs and goals with candidates, as well as describe for them where you see yourself and your team in the future.

A QUICK REMINDER

Mission	→	The purpose or intent of your business
Vision	→	The image of your business fulfilling its purpose
Values	→	What you and your business stand for
Beliefs	→	The basic business rules you and associates will follow
Goals	→	The key benchmarks you expect to achieve

You should also provide each candidate with a brief explanation of your organizational structure and how each position is strategically designed to fulfill the team mission.

TRANSITIONAL PHRASE

Now that I feel I know a lot more about you, I think it's only fair that I tell you a little about me.

ENDING MEETING ONE

You can end meeting one at any point you feel there will not be a match!

If you decide to end the meeting early, or decide the candidate **will not** be a good fit for your team, have the following dialogue.

CANDIDATE SHOWS NO PROMISE

I really appreciate you coming in today! Again, my purpose with this first meeting is simply to put a name with a face and ask a few questions. I will be contacting the top three candidates for a second meeting sometime next week. Thanks, and again, it was a pleasure meeting you!

If you decide the candidate is a good fit for your team and want to proceed, end the meeting with the following dialogue.

CANDIDATE SHOWS PROMISE

It was a pleasure meeting with you today. What I would like to do now is take some time to check your references and study your behavior assessment. Would you be open to contacting your previous supervisors and arranging a confidential phone interview for me? Simply give them each a call and set a time for me to contact them at home, preferably this (or next) weekend. (Schedule a date and time to confirm they have made the appointments.) I am also going to be visiting with other candidates throughout the week, and I will give the top three candidates a call on (date) to schedule a follow-up meeting at which time we will discuss the job thoroughly. Is that fair? Again, it was a pleasure meeting with you and I look forward to speaking with you soon!

NOTE:

When hiring someone with real estate sales experience, always ask for past client references.

4. REFERENCE CHECK

Call all five personal references and all employment references that were authorized.

NOTE:

“Asking for reference information is perfectly legal. Giving out false or malicious information is illegal, and withholding certain negative reference information can be illegal.” - Bradford Smart, from the book *TopGrading*

PERSONAL REFERENCE CHECK

Hi, my name is (Your Name). I was given your name by (Candidate's Name) as a personal reference and would like to ask you a few questions.

Candidate's Name

Reference Name

Relationship

Time Known

Personal Strengths/Things You Like and Respect

Personal Weaknesses/Areas of Improvement

Best Way to Manage/Lead

Do you know of anyone else who might have some insight?

EMPLOYMENT REFERENCE CHECK (Page 1 of 2)

Hi, (Their Name), I really appreciate you taking my call. As (Candidate's Name) told you, I am considering him/her for employment and would like to hear some of your comments. Please know any comments will remain highly confidential, so I would like you to be as open and honest with me as you feel you can be! Is that fair?

Great. First, let me verify a few things:

Start Date

End Date

Title

Salary

Duties/Responsibilities

What would you consider (Candidate)'s strengths to be?

What would you consider (Candidate)'s weaknesses or areas of improvement to be?

On a scale from 1-10, with 10 being exceptional and 1 being poor, how would you rate (Candidate)'s overall job performance? What would have made it a 10(+)?

EMPLOYMENT REFERENCE CHECK (Page 2 of 2)

Next, let me share with you the job description for the position (Candidate) is applying for. (Select most vital activities from job description.)

How do you think (Candidate) would fit in that job?

Is there anything in the job description that concerns you?

How can I best manage/lead (Candidate)?

Anything else I should know about (Candidate)?

I really appreciate you spending time with me today. Your information has been most helpful.

NOTE:

No manager is legally required to accept a reference call.

INTERVIEW TWO

Once all references have been checked and behavior has been assessed, invite the top three candidates back for a second interview. Also call all others whom you are not inviting back to inform them they will not be moving forward.

PHONE CALL TO TOP THREE CANDIDATES

Hi (Candidate), this is (Your Name). Congratulations, you made the cut! I would like to meet with you again on (Date), from (time) to (time). (Approximately 3 hours) Thanks and I'm really looking forward to our visit!

PHONE CALL TO ALL OTHERS

Hi (Candidate), this is (Your Name). I first want to say it was a pleasure spending time with you last week! We have made a decision regarding the position and have decided to go with someone else. I wish you all the best in the future, and again, I'm glad to have met you!

Set the agenda at the beginning of interview #2 with the following dialogue:

MEETING TWO OPENING DIALOGUE

Hi, (Candidate), it's great to see you again. In today's meeting we are going to get job-specific. I am first going to start with, you guessed it, more questions. Then we will review your references' comments and your behavior graph. Finally, we will talk about mutual expectations and the job itself. Sound good? Again, there are no right or wrong answers, only your answers. I will again ask you to be as open and honest with me as you feel you can be. Are you ready to get started? Great!

Continue with Position-Specific Questions

5. POSITION SPECIFIC QUESTIONS

The following are **comprehensive questions** designed to uncover desired competencies for each position. These questions should simply be used to get the momentum ball rolling. Candidate responses can (and probably will) initiate the need for follow-up questions.

REMEMBER:

Stay curious until you are **completely** satisfied that each question has been answered in full. The more specific the question, the better understanding you will gain.

IMPORTANT NOTE

The comprehensive questions to follow were inspired by the book *TopGrading*. This is a fantastic book written by Dr. Bradford Smart and a **must-read** for anyone wanting to master the art and science of hiring talent.

COMPREHENSIVE QUESTIONS

Listing Specialist

1. What is the most difficult or challenging decision you have made recently? (Decision Making)
2. What are the biggest risks you've taken in recent years? (Risk Taking)
3. What are examples of circumstances in which you were expected to do a certain thing and, on your own, went beyond the call of duty? (Initiative)
4. How well organized are you? What do you do to be organized and what do you feel you need to do to be better organized? (Organization)
5. Everyone procrastinates at times. What are the kinds of things that you procrastinate on? (Planning)
6. Have you intentionally progressed in recent years? Explain how you did it - your approach, the problems you encountered, the outcomes. (Excellence)

7. How do you handle yourself under stress and pressure? (Stress Mgt.)

8. What sort of first impression do you think you make? Why? (First Impression)

9. Tell me about a situation in which you were expected to work with a person you disliked. (Likability)

10. How would you define the term “active listening”? How often and how effectively have you used active listening? (Listening)

11. What would your past clients tell me are your strengths and areas of improvement? (Customer Focus)

12. Describe your methods for diagnosing others’ needs. (Customer Focus)

13. When there is a difference of opinion, do you tend to confront people directly or indirectly, or do you tend to let the situation resolve itself? (Assertiveness)

14. Tell me about your real estate career (experience, production, methods).
(Initiative)

15. How would you rate yourself in public speaking? If we had a videotape of your most recent presentation, what would we see? (Communication)

16. Describe situations in which your negotiating skills proved effective and ineffective. (Negotiation)

17. Describe a situation in which you were most effective in selling an idea or yourself.
(Persuasion)

18. Are you a natural leader? Give examples of when people directly followed your lead and when they did not? (Leadership)

19. What is the toughest situation you've ever overcome? (Endurance)

20. How mentally tough will your references say you are? Why? (Endurance)

21. How would you rate your charisma? Why? (Enthusiasm)

22. How would you rate your listing skills? Why? (Skills)

23. Is there anything I should have asked you but didn't?

COMPREHENSIVE QUESTIONS

Buyer Specialist

1. What is the most difficult or challenging decision you have made recently? (Decision Making)
2. What are the biggest risks you've taken in recent years? (Risk Taking)
3. What are examples of circumstances in which you were expected to do a certain thing and, on your own, went beyond the call of duty? (Initiative)
4. How well organized are you? What do you do to be organized, and what do you feel you need to do to be better organized? (Organization)
5. Everyone procrastinates at times. What are the kinds of things that you procrastinate on? (Planning)
6. Have you intentionally progressed in recent years? Explain how you did it – your approach, the problems you encountered, the outcomes. (Excellence)

7. How do you handle yourself under stress and pressure? (Stress Mgt.)

8. What sort of first impression do you think you make? Why? (First Impression)

9. Tell me about a situation in which you were expected to work with a person you disliked. (Likability)

10. How would you define the term “active listening”? How often and how effectively have you used active listening? (Listening)

11. What would your past clients tell me are your strengths and areas of improvement? (Customer Focus)

12. Describe your methods for diagnosing others’ needs. (Customer Focus)

13. When there is a difference of opinion, do you tend to confront people directly or indirectly, or do you tend to let the situation resolve itself? (Assertiveness)

14. Tell me about your real estate career (experience, production, methods).
(Initiative)

15. How would you rate yourself in public speaking? If we had a videotape of your most recent presentation, what would we see? (Communication)

16. Describe situations in which your negotiating skills proved effective and ineffective. (Negotiation)

17. Describe a situation in which you were most effective in selling an idea or yourself.
(Persuasion)

18. Are you a natural leader? Give examples of when people directly followed your lead and when they did not? (Leadership)

19. What is the toughest situation you've ever overcome? (Endurance)

20. How mentally tough will your references say you are? Why? (Endurance)

21. How would you rate your charisma? Why? (Enthusiasm)

22. How would you rate your listing skills? Why? (Skills)

23. Is there anything I should have asked you but didn't?

COMPREHENSIVE QUESTIONS

Transaction Coordinator (Listing and Closing)

1. Do you consider yourself detailed-oriented (perfectionist)? Why? (Behavior)
2. How do you think your references rated your computer proficiency? (Self-Awareness)
3. Are you better at managing a lot of things simultaneously or focusing on a few? (Organization)
4. How well organized are you? What do you do to be organized? What do you feel you should do to be better organized? (Organization)
5. Everyone procrastinates at times. What are the kinds of things that you procrastinate on? (Planning)
6. How do you think your former employers described your strengths and weaker points with respect to personal organization, attention to detail and planning? (Organization/Planning)

7. Give me some examples from your prior jobs of going beyond what was normally expected to enhance your company's reputation or image. (Customer Focus)

8. Do you believe in asking for forgiveness rather than permission, or do you wait for your supervisor's full approval before you act? (Independence)

9. How do you handle yourself under stress and pressure? (Stress Management)

10. When were you so frustrated that you didn't treat someone with respect? (Likability)

11. How would you describe your level of assertiveness? (Assertiveness)

12. Give me some examples from your prior jobs of going beyond what was normally expected to enhance your company's reputation or image. (Initiative)

13. How would you define the term "active listening"? Give me a couple of examples where you have used active listening. (Listening)

14. How would you rate your overall data entry abilities? Why? (Experience)

15. How would you rate your abilities to communicate both verbally and in writing?
(Communication)

16. Is there anything that I should have asked you but didn't?

COMPREHENSIVE QUESTIONS

Marketing Coordinator

1. Do you consider yourself detailed-oriented (perfectionist)? Why? (Behavior)
2. Are you better at managing a lot of things simultaneously or focusing on a few? (Organization)
3. How well organized are you? What do you do to be organized? What do you feel you should do to be better organized? (Organization)
4. What is the most difficult or challenging decision you have made recently? (Decision Making)
5. Everyone procrastinates at times. What are the kinds of things that you procrastinate on? (Planning)
6. How creative are you? Give an example of your creativity. (Creativity)

7. In the past year, what specifically have you done to remain knowledgeable about the real estate market and industry, agent challenges, technology and trends?
(Analysis Skills)

8. How do you think your former employers described your strengths and weaker points with respect to personal organization, attention to detail and planning?
(Organization/Planning)

9. Do you believe in asking for forgiveness rather than permission, or do you wait for your supervisor's full approval before you act? (Independence)

10. How do you handle yourself under stress and pressure?

11. When were you so frustrated that you didn't treat someone with respect?
(Likability)

12. How would you define the term "active listening"? How often and how effectively have you used active listening? (Listening)

13. How would you describe your level of assertiveness? (Assertiveness)

14. Give me some examples from your prior jobs of going beyond what was normally expected to enhance your company's reputation or image. (Initiative)

15. How would you rate your overall marketing abilities? Why? (Experience)

16. Describe a situation in which you were most effective in selling an idea or yourself. (Persuasion)

17. How would you rate your abilities to communicate both verbally and in writing? (Communication)

18. Is there anything that I should have asked you but didn't?

COMPREHENSIVE QUESTIONS

Administrative Assistant

1. Do you consider yourself detailed-oriented (perfectionist)? Why? (Behavior)
2. How do you think your references rated your computer and phone proficiency? (Self-Awareness)
3. Are you better at managing a lot of things simultaneously or focusing on a few? (Organization)
4. How well organized are you? What do you do to be organized? What do you feel you should do to be better organized? (Organization)
5. Everyone procrastinates at times. What are the kinds of things that you procrastinate on? (Planning)
6. How do you think your former employers described your strengths and weaker points with respect to personal organization, attention to detail and planning? (Organization/Planning)

7. Do you believe in asking for forgiveness rather than permission, or do you wait for your supervisor's full approval before you act? (Independence)

8. How do you handle yourself under stress and pressure? (Stress Management)

9. When were you so frustrated that you didn't treat someone with respect? (Likability)

10. What sort of first impression do you think you make? Why? (First Impression)

11. How would you define the term "active listening"? Give me a couple of examples where you have used active listening. (Listening)

12. Give me some examples from your prior jobs of going beyond what was normally expected to enhance your company's reputation or image. (Customer Focus)

13. How do you think your references rated your enthusiasm? Why? (Enthusiasm)

14. How would you rate your abilities to communicate both verbally and in writing?
(Communication)

15. Is there anything that I should have asked you but didn't?

COMPREHENSIVE QUESTIONS

Runner

1. How well organized are you? What do you do to be organized? What do you feel you should do to be better organized? (Organization)
2. Everyone procrastinates at times. What are the kinds of things that you procrastinate on? (Planning)
3. How do you think your former employers described your strengths and weaker points with respect to personal organization and attention to detail? Why? (Organization/Planning)
4. Do you believe in asking for forgiveness rather than permission, or do you wait for your supervisor's full approval before you act? (Independence)
5. When were you so frustrated that you didn't treat someone with respect? (Likability)
6. What sort of first impression do you think you make? Why? (First Impression)

7. Give me some examples from your prior jobs of going beyond what was normally expected to enhance your company's reputation or image. (Customer Focus)

8. How do you think your references rated your enthusiasm? Why? (Enthusiasm)

9. How many blemishes are on your driving record? (Experience)

10. How would you rate your communication skills? Why? (Communication)

11. Is there anything that I should have asked you but didn't?

6. POSITION-SPECIFIC TESTS

You must be sure the candidate possesses the knowledge and skills necessary to succeed in the position. This can be accomplished with a position and/or task-specific test.

Simply pick the most important activity or activities of the position and create a test that proves or disproves the candidate's capabilities.

APPROPRIATE POSITION-SPECIFIC TESTS INCLUDE

Make a 15-minute presentation (Listing Specialist; Buyer Specialist).

Answer these contract questions (Listing Specialist; Buyer Specialist).

Demonstrate your computer skills (Transaction Coordinators).

Demonstrate your phone skills (Administrative Assistant).

7. REFERENCE REVIEW

After the position-specific test(s), take a short break. Have a prepared flip chart page, like the one below, summarizing important reference remarks. Tape the page to the wall and review remarks with the candidate. (Keep the sources of remarks confidential.)

EXAMPLE:

REFERENCE REMARKS	
<u>Strengths</u>	<u>Weaknesses</u>
<u>Overall Job Performance</u>	<u>Best Ways To Manage</u>
Average =	
Comments:	

8. BEHAVIOR REVIEW

Have a prepared flip chart page with the behavior graph drawn out and the candidate's behavior style indicated on the graph. Also, indicate the preferred behavioral section for the applied for position. Tape the flip chart page next to the reference remarks and discuss thoroughly.

If the candidate's behavior is congruent with the way they responded to earlier questions and is validated by what their references said, then move to step nine.

If their behavior graphs are different from the way they responded to earlier questions or to what their references said, then **validate** the behavior assessment as shown below.

VALIDATING THE BEHAVIORAL ASSESSMENT:

In question #1 you said you were easy to get to know personally in business or in unfamiliar social environments. What did you mean by that?

Give me a specific example of how you've demonstrated this in your **business** life.

Give me a specific example of how you've demonstrated this in your **personal** life.

Repeat above questions for each response on the behavioral assessment.

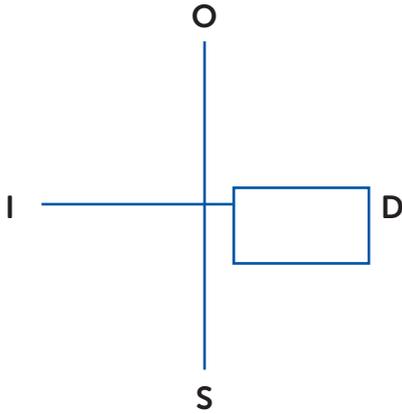
NOTE:

After validating the behavioral assessment, it will be **obvious** whether the candidate possesses the preferred behavioral style for the position.

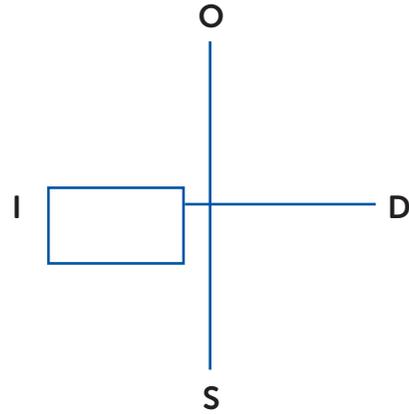
PREFERRED BEHAVIORAL STYLES

Alessandra Graph

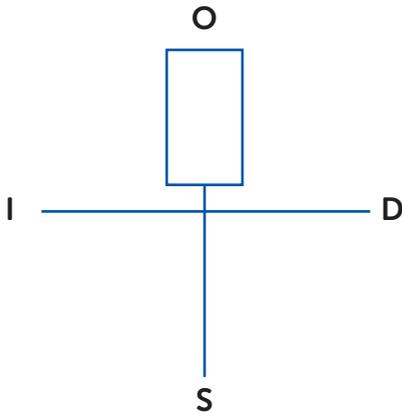
Listing Specialist



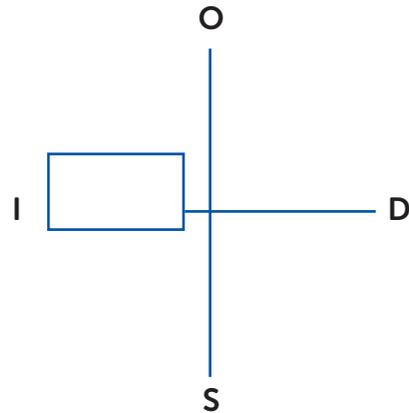
Listing Coordinator



Buyer Specialist



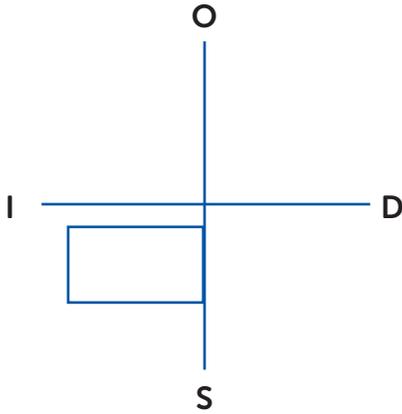
Closing Coordinator



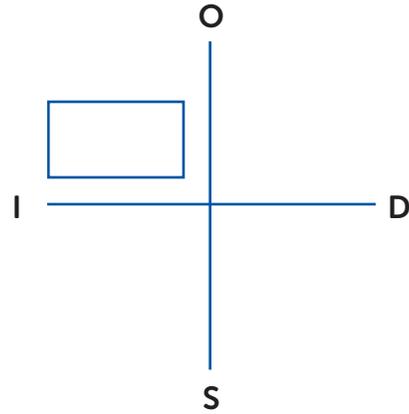
PREFERRED BEHAVIORAL STYLES

Alessandra Graph

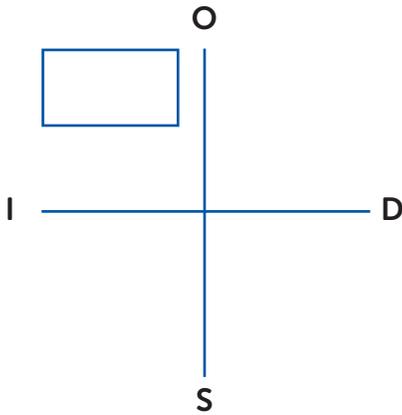
Marketing Coordinator



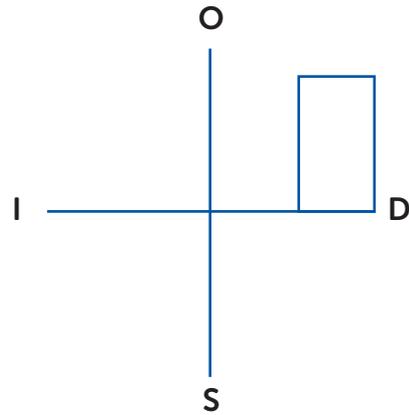
Runner



Administrative Assistant



Team Leader



9. LONG-TERM CAREER VISION

Once **you** are convinced the candidate is the right person for the right position, you should get a feel for their **long-term career aspirations**.

LONG-TERM CAREER VISION QUESTIONS

Career wise, where would you like to be in five years?

What's important to you about accomplishing that?

Or

What do you hope to accomplish with your career over the next five years?

What's important to you about accomplishing that?

REMEMBER:

You are interested in a long-term working relationship, not a short-term employment fix.

10. WIN-LOSE AND MUTUAL EXPECTATIONS

The win-lose and mutual expectations conversation verifies that everyone is on the same page. It also allows the relationship to get off to the best start possible.

TRANSITIONAL DIALOGUE

Let's switch gears for a moment. It's been my experience that conflict only arises when expectations differ. Would you agree?

WIN-LOSE DIALOGUE

Great, with that in mind ...

How does someone win with you?

How does someone lose with you? (Write answers on Your Opinions Matter.)

Let me share with you how someone wins and loses with me ...

(Hand candidate the sheet defining how someone wins and loses with you.)

EXPECT-FROM-YOU DIALOGUE

What do you feel I have the right to expect from you as a member of the team?
(Write answers on Your Opinions Matter.)

Let me share with you what I feel I have the right to expect from you ...

(Hand candidate the sheet titled: What I Expect From You.)

EXPECT-FROM-ME DIALOGUE

What do you feel you have the right to expect from me as your team leader? (Write answers on Your Opinions Matter.)

Let me share with you what I feel you have the right to expect from me ...

(Hand candidate the sheet titled: What You Can Expect From Me.)

YOUR OPINIONS MATTER

HOW DOES SOMEONE WIN AND LOSE WITH YOU?

WIN

1. _____
2. _____
3. _____
4. _____
5. _____

LOSE

1. _____
2. _____
3. _____
4. _____
5. _____

WHAT DO YOU FEEL I HAVE THE RIGHT TO EXPECT FROM YOU AS A MEMBER OF OUR TEAM?

1. _____
2. _____
3. _____
4. _____
5. _____

WHAT DO YOU FEEL YOU HAVE THE RIGHT TO EXPECT FROM ME AS THE OWNER?

1. _____
2. _____
3. _____
4. _____
5. _____

WIN-LOSE

YOU WIN WITH (YOUR NAME) BY:

1. _____
2. _____
3. _____
4. _____
5. _____

YOU LOSE WITH (YOUR NAME) BY:

1. _____
2. _____
3. _____
4. _____
5. _____

EXPECTATIONS

WHAT I EXPECT FROM YOU AS (JOB TITLE)

- Stay positive, high-minded and learning-based
- Notify me immediately if your needs are not being met
- Perform to the standards of the job description (Review)
- Remain accountable to the defined performance standards
- Show up
- Show up on time
- Communicate with me openly and honestly
- Dress professionally
- Stay committed to achieving your goals

WHAT YOU CAN EXPECT FROM ME AS THE TEAM LEADER

- Always maintain a win-win relationship. With me it's win-win or no deal
- Maintain a high-minded, learning-based, productivity-specific environment
- Provide you with high-level training on a consistent basis
- Provide you with accountability and/or consulting on a consistent basis (Review development plan and training manual)
- Compensate you in a win-win fashion (Review compensation)
- Share office profits with you (After six months)
- Communicate with you openly and honestly

STAFF DEVELOPMENT CALENDAR

Talented candidates want and expect to be fully developed so they can perform at high levels. Therefore, you must demonstrate your willingness to develop them by sharing a well thought out and meaningful training and development calendar.

SAMPLE TRAINING CALENDAR AND AGENDA		
Topic	Date	Time
1. Answering Phones	Monday, June 28	8:00 - 8:30
2. Phone Systems	Monday, June 28	8:30 - 9:30
3. Greeting Guests	Monday, June 28	9:45 - 10:00
4. Mail, Fax, Email	Tuesday, June 29	8:00 - 8:45
5. etc ...		
6.		
7.		
8.		
9.		
10.		
11.		

NOTE:

A three-month training calendar is recommended with the first session revolving around priority #1. You also should have assembled a step-by-step procedures manual for the position. Think of this as an “owner’s manual” for the position. If you don’t have one, simply have the trainee create it as they are being trained.

COMPENSATION MODELS

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 role models motivate employees to excel and allow everyone to **share** in the growth and success of the office.

Staff 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

ENDING INTERVIEW TWO

Hiring the right person requires extra time, energy and effort!

If you decide to end the meeting early, or decide the candidate **will not** be a good fit for your team, have the following dialogue.

CANDIDATE SHOWS NO PROMISE

I really appreciate you meeting with me today. In fairness to the other candidates, I would like to meet with them before deciding the two who will be moving on to the final phase of the process.

Again, thanks for your time today and I will call you as soon as my decision has been made.

If you decide the candidate is a **good fit** for your team and want to proceed to the final interview, end interview two with the following dialogue.

CANDIDATE SHOWS PROMISE

I really appreciate you meeting with me today and I definitely feel we have the makings of a win-win relationship. Would you agree?

Great. There's one more thing I'd like to do before making a final decision. I would like to invite you and your wife (family) to dinner this week so we can talk in less formal surroundings. (Set date.)

Again, thanks for your time today and I look forward to meeting your wife (family).

INTERVIEW THREE

11. DINNER WITH CANDIDATE AND SPOUSE

The last step before making a final decision is to invite each of the remaining candidates, along with their **spouse** (and kids), to dinner.

Going to dinner gives you an opportunity to meet the family and gauge the candidate's behavior in a social setting.

It also allows you to assess whether the candidate resides in a supportive and stable home environment, which is **vital** to long-term career success.

For candidates you are considering in leadership positions, pay close attention to their children's behavior. Doing so will give you a lot of insight on the candidate's leadership abilities.

REMEMBER:

Keep the dinner conversation light and pay close attention to the candidate's demeanor and behavior. You are still in heavy evaluation mode!

12. OFFER POSITION

Closing is the beginning of a win-win relationship!

Once you are convinced you have the right person in the right position for the right reasons, call the candidates to share the news.

PHONE CALL TO OFFER THE POSITION

First let me say that I really appreciate you going through my lengthy hiring process. As you can now attest, I take adding members to our team very seriously.

After careful consideration, I am pleased to say that I would love for you to be part of our team and would like to formally offer you the position.

If candidate agrees, then:

Great, let's get together tomorrow so we can tie up some loose ends and pick a start date.

PHONE CALL TO OTHER CANDIDATE

First let me say that I really appreciate you going through my lengthy hiring process. As you can now attest, I take adding members to our team very seriously.

After careful consideration, I have decided to go with someone else. This in no way means you are not qualified. I simply feel the other candidate is a better fit for the position.

NOTE:

If candidate wants to know specifics, then be completely honest with your answers.

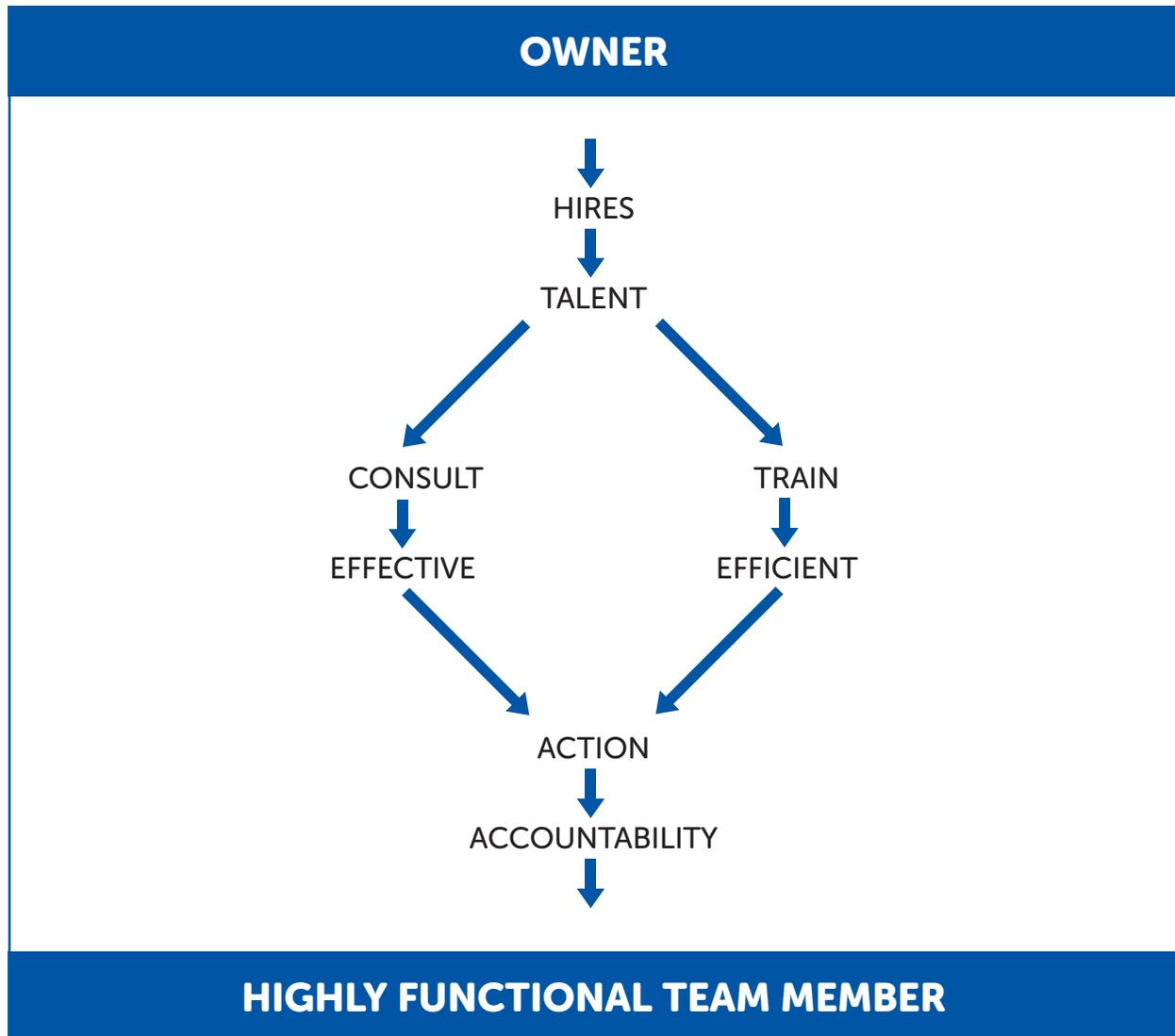
NOW WHAT

A happy staff is one that's in the right positions and productive!

Once you make the hire, it's imperative that your new team member has positional:

Direction - Consulting
Knowledge - Training

Ability - Training
Focus - Accountability



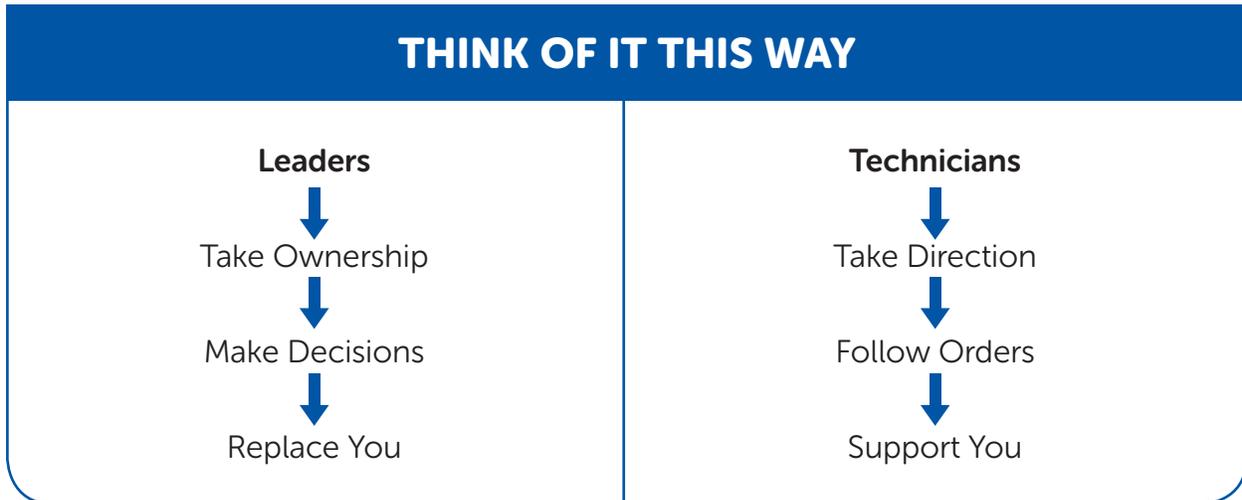
truth

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

DEVELOPING A GREAT STAFF

Microdevelop so you don't have to micromanage!

Since there are only eight key staff positions, you must work diligently to **create** leaders and not technicians.



The person who fills each position must take **complete** ownership of the mission and vision for that position. Furthermore, they must fully understand how their position relates to the overall mission and vision of the office.

Place all newly hired staff members in a 90-day probationary program

It's during this period that you will fully develop new team members and they will **earn** the right to **own the position**.

Your expectation is that each team member is going to consistently work to improve the systems and strategies being used in the position. Thus, each staff member must make a personal commitment to mastery and to study and practice with the specific intent of getting better.

To assure this happens, you must promote a model of mastery **and change**. Staff members who reject mastery should be replaced immediately as they will prevent the team from reaching its potential.

BOTTOM LINE:

You need team members to take complete ownership of their position and then work diligently to make the position better.

**You Can't Teach a Kid to
Ride a Bike at a Seminar!**

- David Sandler