

The Perfect Real Estate Assistant

Monica Reynolds

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REUNION

Monica Reynolds

San Diego, CA

Listing Specialist/Partner of the
Heller Real Estate Group

monica@hellerthehomeseller.com 760-632-8408

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evaluation for this session.

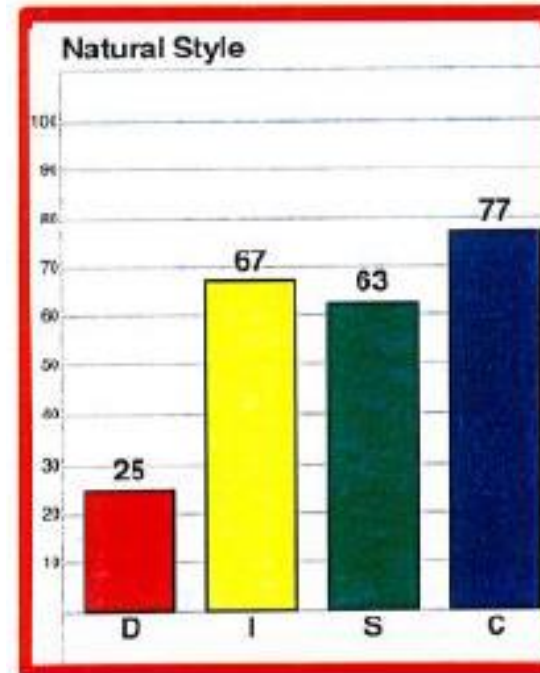
The Perfect Profile of a Great Assistant

- Personality style—CSI, SCI, CDI
- Availability—An assistant schedule that supports the goals of the team
- Attitude—“Can do”
- Talent
 - Computer
 - Communication skills
 - Detailed/Organized
 - Administrative skills

Hiring System



SHANNON O'BRIEN



Heller Group
Team Member
since _____

- Because of attention to both people and quality control, has the ability to contribute to a pleasant and efficient work environment for the team
- Maintains high quality control standards while also being sensitive to the needs of the other team members
- Shows a high degree of conscientiousness and thoroughness in handling any work project
- Able to accomplish complex tasks by working enthusiastically with people

Agent's Description of the Perfect Assistant

1. Delivers excellent customer service
2. Promotes the agent
3. Knows the agent's job description
4. Handles all incoming calls
5. Handles all paperwork
6. Keeps agent on track
7. Handles the baby with the "dirty diaper"
8. Monitors all systems
9. Implements new systems
10. Does productive and efficient work

Agent's Description of the Perfect Assistant

- 11. Is a profit center ... pays for him or herself
- 12. Knows the agent's schedule and keeps him/her on track
- 13. Meets all deadlines
- 14. Monitors the goals
- 15. Keeps track of all numbers
- 16. Maintains "Office Policy and Procedures Manual"
- 17. Assists in the hiring process
- 18. Maintains all marketing
- 19. Excellent communication skills
- 20. Keeps a professional environment at all times

**Agents, Do You
Know Your Job
Description?**

1. Prospect \$
2. Lead follow-up \$
3. Go on qualified appointments \$
4. Write contracts \$
5. Negotiate contracts \$

**Assistants, Do You
Know Your Boss's
Job Description?**

Job Description Sample

The Perfect Real Estate Assistant

Assistant Systems for Success

Call 4: Job Description and Schedule

Job Description Sample I

Goals

- To help the agent increase business
- To help the agent decrease expenses
- To assist the agent in developing clients for life
- To keep agent on track

Daily Musts

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

Responsibilities

- Handle all incoming phone calls
- Return all phone calls in a timely manner
- Handle all incoming emails
- Prepare all packages pre-list, listing and file folders
- Keep all files neat and orderly
- Send out any pre-list/FSBO packages
- Monitor and follow up on all sales/escrows/closing files with _____
- Maintain business supply inventory
- Monitor website
- Handle all checking accounts, deposits and reconciliations
- Enter information in QuickBooks
- Keep track of miles
- Send out farm mailings quarterly
- Follow-up letters to all clients
- Post new listings on office board
- Monitors weekly, monthly, and yearly goals.
- Update all clients' records in the computer
- Responsible for all data entry and reports
- Responsible for all correspondence
- Ask personal people farm for referrals for the agent
- Maintain and improve Office Policy and Procedure Manual
- Back up computer files
- Prepare weekly Group One Tabloid write ad using "If" sheet – due Thursdays

Assistant Systems for Success

Call 4: Job Description and Schedule

Job Description Sample I (cont.)

After Offer Is Received

- Put up Sold or Pending sign
- Collect property brochures
- Prepare closing file

After Closing

- Report sold to MLS
- Remove lockbox
- Remove Sold sign
- Email Just Sold cards

Assistant Systems for Success

Call 4: Job Description and Schedule

Job Description Sample I (cont.)

Buyer Listings Clients

- Pre-listing package deliver or send
- Call seller, confirm date/time
- Prepare a New Client File - Computer and hard copy
- Work with _____ on examples of
 - Prepare property brochure
 - Group One tabloid,
 - Just sold post cards
- Prepare CMAs
- Order property profiles from title company
- Property tax assessor information sheet
- Prepare the GREEN listing folder and WHITE Folder
- MLS Input sheet – filled out and highlight missing/needed information
- Order 200 Just Listed names of neighbors from the title company
- Prepare map and directions to property

Seller Listings Clients

- Prepare a New Client File - Computer and BLUE hard copy
- Monitors and follow up on all listings
- Submit Green MLS information
- Submit proper information and photos to MLS.
- Photos and text to Realtor.com and group website
- Order “for sale” sign
- Sold Rider Up
- Email MLS printout to seller
- Email new listing to top 25 agents
- Work with _____ on
 - Prepare property brochure
 - Group One tabloid
 - Just sold post cards
 - Order brochures
- “Thank you letter” to seller
- Make extra keys, pick up keys
- Install lockbox with key
- Make sure sign is ready
- Make appointment to take pictures and virtual tour
- Put up brochure box with fliers
- Make sure clients enough fliers
- Open houses
- Send Just Listed cards
- Email Just Listed cards
- 1-800 information line

Assistant Systems for Success

Call 4: Job Description and Schedule

Job Description Sample I (cont.)

After Offer Is Received

- Put up Sold or Pending sign
- Collect property brochures
- Prepare closing file

After Closing

- Report sold to MLS
- Remove lockbox
- Remove Sold sign
- Email Just Sold cards
- Email Just Sold cards
- Send thank you for working with our group/letter and gift
- Thank you letter to other agent
- Thank you letter to lender
- Send sold information to newspaper
- Put in anniversary file
- Client survey sent and received
- Convert file to GREEN sold file
- Call on Move Card
- Call Just Sold
- Remove from internet
- Dated Jan 20, 200_ Closing letter and statement for buyer
- Dated Jan 20, 200_ closing Letter and statement for seller
- Change website to Sold
- Update sold records in pre-list package
- Forwarding address
- Email Solds to _____

Buyer Clients

- Prepare a New Client file - computer and RED hard copy
- Pull up house in MLS
- Prepare showing route
- Schedule showing appointments
- Make copies for clients/agent
- Make any follow-up calls
- Congratulation letters for buyers
- Call clients and introduce procedures/what to expect
- Monitor and follow up on closing files with _____
- Attend closings
- Send thank you for working with our group/letter and gift
- Client survey sent and received

Assistant Systems for Success

Call 4: Job Description and Schedule

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- Call seller, confirm date/time
- Prepare a New Client File - Computer and hard copy
- Work with _____ on examples of
 - Prepare property

Systems: Why They Are Important

1. Increase business
2. Excellent customer service
3. An efficient road map to duplicate success
4. Set expectations
5. Define the goal
6. Manage stress
7. Ensure scalability
8. Increase profitability

Communication System

Four ways to communicate:

1. Spoken

- a. Tonality
- b. Face-to-face
- c. Call – Email – Call

2. Written

- a. Clear
- b. Concise
- c. Brief

Communication System (cont.)

Four ways to communicate:

3. Electronic

- a. Email
- b. Texting
- c. Voice mail

4. Nonverbal

- a. Facial expressions
- b. Posture
- c. Gestures

What Does This Email Mean?

I did not SAY Bob took that.

I did not say Bob took that.


I did not say BOB took that.

I did not say Bob TOOK that.

I did not say Bob took THAT.

How many times have your emails been interpreted incorrectly?

Communication System (cont.)

Assistant Systems for Success

Call 3: Communication

Daily Meeting Form

Date: _____

Today's to do list
1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____
8. _____
9. _____
10. _____
11. _____
12. _____
13. _____
14. _____
15. _____

Today I accomplished
1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____
8. _____

Tomorrow I need to
1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____
8. _____

Problems/Questions

MAPS – FAST TRACK COACHING WORKBOOK

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Listing Update

Chris and Monica Listing Update 12/16/2014										
	A	B	C	D	E	F	G	H	I	J
1	Seller	Phone Number	Address	Zip	Price R. Date	Current Price	LD	Exp. Date	Original Price	DOM
2										
3	Soma Wari	818-364-3434 Lisa	7415 Charmont #2516	92122	10/30/2014	375,000	9/3/2014	12/31/2014	399,900	100
4	Kathy/Ed Mayer	760-632-1331	7303 Circulo Papayo	92009		1,099,000-1,159,900	7/22/2014	1/23/2015	1,049,900-1,159,900	48
5	Daniel Callahan	702-278-8667	2414 Front St. #36	92101		789,900	10/1/2014	12/23/2014	789,900	71
6	Pam/Pete Couey	619-813-8249 Pete	9652 Meadow Mesa	92026	10/29/2014	675,000-725,000	9/12/2014	3/5/2015	675,000-745,000	91
7	Aliaga Family (Jennifer)	760-518-5306	396 Paseo Marguerita	92084	12/12/2014	370,000	10/24/2014	1/14/2015	385,000	49
8	Roe/Carolyn Vernon	619-784-7121	8040 Smokewood	92071	11/12/2014	\$425,000	10/4/2014	12/31/2014	439,900	30
9	Jeffrey Frisse	760-607-2871	2136 S. Coast Hwy	92054		\$399,900	12/9/2014	5/5/2015	399,900	2
10	Jeffrey/Paty Newman	760-717-3450	31457 Lake Vista Cir	92003		1,100,000-1,250,000	11/7/2014	1/25/2014	1,100,000-1,250,000	28
11	Christine/Daniel Ricwulf	424-270-4099	309 N.Melrose Dr. #F	92083		\$175,000	11/4/2014	5/4/2015	175,000	39
12	Don/Jane Muscetta	760-758-5658	1409 Darwin Dr.	92056		389,900	12/10/2014	1/5/2015	389,900	1
13	Meritage Homes	951-547-8300	5523 Lipizzaner Cir	92057	12/5/2014	678,990	11/17/2014	2/10/2015	689,900	24
14	Meritage Homes	951-547-8300	5599 Spanish Horse	92057	12/5/2014	679,900	11/18/2014	2/10/2015	699,990	24
15	Meritage Homes	951-547-8300	5610 Quarter Horse	92057	12/5/2014	699,990	18-Nov	2/10/2015	716,990.00	24
16	Randy Williams	619-381-4004	3740 Corona	91941	12/9/2014	295,000	11/26/2014	2/6/2015	310,000	14
17	Angelo/Janet Lardas	714-504-0018	14350 Ciera Ct	92064		2499900-2899900	11/13/2014	5/4/2014	2499900-2899900	17
18	Barbara Burell	760-728-1771	1016 S Stagecoach	92028	12/5/2014	369 - 389,000	11/10/2014	12/31/2014	389,000-409,000	21
19	David Bird	619-569-3837	10222 Norma Gardens #4	92071		239,900-259,900	11/21/2014	2/19/2015	239,900-259,900	21
20	Dennis & Rosemary	858-259-8305	3750 Overpark Rd	92130		1285000	12/19/2014	2/8/2015	1285000	0
21	Jim & Aimee	858-397-3378	11132 Orion Way	92126		549-589,900	12/17/2014	3/9/2014	549-589,900	1
22	Fima & Lucy	619-997-5318	621 Elizabeth St	92069		439-459,900	12/18/2014	3/12/2014	439-459,900	0
23	Kathleen	619-988-1138	931 Concepcion Ave	91977		259900	12/18/2014	4/24/2014	259,900	0
24	Gary	858-354-1115	687 Helen Dr	92057		319-349,900	12/18/2014	3/9/2014	319-349,900	0
25	Marla	858-449-4113	7635 Family Circle	92111		389,900	1/2/2015	5/16/2015	389,900	0
26										
27										
28										
29		*DOM since listing was refreshed								

Pending Update

Escrow List 12/16/14				
Seller	Property Address	Phone	2nd Phone	Price
Christian & Dominique Griffin	13165 Sunset Point	619-867-7513Dom	858-220-6424Christi	\$1,195,000
Lincoln & Ruby Pollock DbI	10937 Via San Blas	858-504-0263		\$285,000
Luc & June Tran	136 Caminito Del Postigo	858-926-6008		\$538,000
Gordon & Elizabeth Ralyea(Div)	1622 Landquist	760-445-0030Gordon	760-943-8830Elizabet	\$590,000
Scott & Kelly Koopsen	1837 Blackhawk	760-807-0569Scott	760-807-2260Shelly	\$325,000
Thomas Taylor	1504 Rubenstein	903-356-3830		\$985,000
Greg & Lisa Provenzano	1414 Lauren Ct	858-342-1735Greg	760-877-1951Lisa	\$1,270,000
Tri Pointe Homes DbI	1157 Breakaway	949-478-8672Brandi		\$400,000
Mike & Suzy Hufford	12940 La Tortola	858-603-2514Mike	619-944-8577Suzy	\$465,000
Dr. Mohammad & Susan Arab	555 Front St. #902	760-355-8500off		\$615,000
Mark Frederick	1453 Frankfort	858-504-0864		\$365,000
Bill Feldman	Avenida Oceano	619-540-0079	619-449-2011	\$310,000
Richard Grieser	3740 Valley Vista	949-478-8672Brandi		\$445,000
Tri Pointe Homes	1185 Breakaway	949-478-8672Brandi		
Jon & Denise Highum	10237 Quail Canyon	619-787-4870Denise		\$587,000
Bank of America REO	1589 Corte Capriana			\$276,355
Michael & Melanie Paliotti	812 Daybreak	760-216-3342Michael	760-525-4914Mel	\$280,000
Terry & Nancy Ward	3631 Ryan	760-740-0815Terry	760-809-5522Nancy	\$749,000
Rene & Maureen Savalle	3802 Mykonos #22	619-540-7971hm	619-204-4074wk	\$443,500
Marcy Tompkins	1925 Burroughs	907-529-6075		\$325,000
Matt Glass	379 N. Melrose #A	760-583-0919Kristen		\$155,000
Matt Costanzo & Shannon Mahoney	3453 Corte Selva	619-871-1561Matt	858-344-4707Shannor	\$770,000
William & Susan Prario (buyer also)	337 Woodmeadow	760-788-7769hm	760-239-1044Sue	\$453,000
Bill & Susan Prario	8501 Sunview			\$365,000
Jeff & Anita Draa	17232 Cuvee Court	858-335-4438		\$680,000
Lindy & Eileen Dial	4451 Toni Lane	619-460-3748		\$365,000
Tri Pointe Homes	1124 Breakaway	949-478-8672Brandi		\$420,000
Cesar & Rufina Reyes	1818 Devon	760-497-8359		\$360,000
David Moore	2732 East (dbI end)	660-939-2665		\$100,000
Tri Pointe Homes	1169 Breakaway			\$417,000
Mike & Cheryl Flanagan	24726 Bjoin Rd.	760-807-9892Cheryl	760-807-9801	\$343,000
Lei Ann Altar	4951 Lamia Way	760-436-3301hm	760-470-8500cell	\$338,000
Mark & Michelle Belford	937 Doris	760-560-7611hm	760-473-3459cell	\$575,000

Escrow List 12/16/14			
Gary & Joanne Goss	1167 Quail Gardens	760-518-9111Gary	\$742,000
Cynthia Cecial	7207 West Point	619-871-1816	\$254,600
Total Sellers 35			
Buyer	Property Address	Phone #	Price
John & Rose Langford	12376 Carmel Country Rd. #J302	619-865-4226John	\$321,000
Mike Hatch	4381 Hill	760-613-5503	\$1,100,000
Kim & Chanh Tran dbI	10937 Via San Blas		
	1157 Breakaway		
Mark Frederick	2732 East (dbI end)	858-504-0864	\$100,000
William & Susan Prario (seller also)	8501 Sunview	760-788-7769hm	\$365,000
	1167 Quail Gardens	760-688-8047cell	\$742,000
		760-239-1044Sue	
		760-633-1645hm	

Communication System (cont.)

The Friday Report

1. The Friday Report is a very effective way to have a record of the accomplishments of the week.
2. It reminds the agent about the job and the value of the assistant.
3. It is a great reminder of the business moving forward or not.

Communication System (cont.)

Sample Email for Friday Report

"Good morning!"

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

Please indicate your "Week High" and "Week Low."

How did you wow a customer this week?

Thank you for your contribution to our team.

Sample of an Actual Friday Report

What is wrong
with this report?

FRIDAY REPORT

Name: Sarah **Date:** 1/21/2014

Week High: Receiving "thank you" gifts from two separate clients who closed escrow last week.


Week Low: Having to move one closing to next week.

Five Accomplishments:

1. Three new escrows
2. Three new buyer referrals placed out of area
3. Successfully negotiated two repair requests ... seller and buyers happy
4. One short sale escrow closing one week early
5. Cleaned up file drawer and purged

Customer Wow: Saved client Smith \$300 on repairs

Communication System (cont.)

	Assistant Systems for Success	Call 3: Communication
Agent/Assistant Year-end Mastermind		
<p>1. If you were CEO of my company, what would you do differently? Why? How would you implement?</p> <p>a.</p> <p>b.</p>		
<p>2. Bring two success stories; they can be about a system or client related to share with the group.</p>		
<p>3. Give me two ideas on ways you think I can improve customer service.</p> <p>a.</p> <p>b.</p>		
<p>4. Give me two ideas on ways you think I can increase business.</p> <p>a.</p> <p>b.</p>		
<p>5. Give me three ways to decrease expenses.</p> <p>a.</p> <p>b.</p> <p>c.</p>		
<p>6. Give me two ways that as a team we can be more effective.</p> <p>a.</p> <p>b.</p>		
<p>7. How can I help you bring one referral to the team every month?</p>		
<p>8. What are two challenges/problems you would like to mastermind with the group to help resolve?</p> <p>a.</p> <p>b.</p>		
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Prelist System

PREQUALIFYING LISTING APPOINTMENT

Seller Name: _____

Date: _____

Property Address: _____

STEP 1

Questions

Questions ~ About the Home	Responses
So that I can do an excellent job for you, may I ask you a couple questions before I come out to meet with you?	
Please tell me a little about your home.....	
This is the personality test to learn who they are	
May I ask you to please describe your home for me?	
What improvements have you made?	
How long have you lived in your home?	Years Months
What are the positive features of your home What about the negatives?	
May I ask you why you decided to buy this home?	
Questions ~ Moving	
May I ask why you are moving? (Go 3 levels deep)	
Where are you moving to?	
What is important about moving to you?	
What will that ultimately do for you and your family?	
How soon do you need to move?	Months Weeks
Questions ~ Timing	
What is the perfect time frame for you to be sold?	
What will happen if your home is not sold by then?	
Any family hardships?	
May I ask who is on title?	
Will all the decision makers be at our appointment?	YES NO
May I also ask you what is your current mortgage amount? Any second mortgage?	1st \$ 2nd \$
Are you planning on interviewing any other agents for the job of selling your home?	YES NO
<u>GREAT</u> , may I ask who you will be meeting with? (Be the last appointment or all is lost most of the time)	

PREQUALIFYING LISTING APPOINTMENT

Questions ~ Property Value	
also ask what do you feel is the current value of home?	\$
price will you not go below?	\$
would you like to net from the sale of your home?	\$
re a certain net that you need in order to sell your ?	\$
says your home is worth \$ XXXXX, how do you bout that?	
Questions ~ How did you hear about us?	
ou familiar with the Heller Team marketing gies?	YES NO
use: GREAT, I look forward to sharing that with	
ask you how did you happen to call our team?	If this question is applicable
d like to email you a package of information and a video about how we sell homes.	
get your email address?	EMAIL:
get your wife's/husband's email?	EMAIL:
QUALITIES YOU ARE LOOKING FOR IN A REALTOR	
questions do you have at this time: (DO NOT ANSWER, COMMISSION, ETC.)	
SET THE APPOINTMENT	
ask you a question: <u>RESPONSE</u>	
Great Questions, absolutely will discuss that first when we meet. sounds like you are ready to sell your home!	
Thank you for calling <u>OR</u> Thank you for speaking with me, I will plan on meeting with you on _____ at _____ am/pm	

PREQUALIFYING LISTING APPOINTMENT

Email Package
Deliver package (Yes, do both!)
Call to Confirm

BUILDING RAPPORT WHEN THE DOOR OPENS

Smile
Firm Handshake
Take Notes on a Clipboard
Ask Questions
Act like you love the house

THE PRESENTATION

Review what you do to sell homes!

VIEWING THE CMA PRESENTATION


Be Confident Confident Confident Confident!

ASK FOR THE SIGNATURE

At least 5 times!
Ask for the signature
Ask for the signature
Ask for the signature
Ask for the signature
Did you ask for the signature

Prelist System (cont.)

Prelist Package

 Assistant Systems for Success

Call 8: The Perfect Listing System

Prelist Package

⇒ Hand deliver, mail, or delegate this package ~ use a personalized 9.5 x 11 envelope or a company logo envelope.

- Presells the agent prior to appointment
- Keep it simple
- 6-8 pages only
- Agent must go over briefly at presentation
- Can be used for FSBO/ EXPIRED with different cover letter

Include:

- ✓ Appointment Letter
- ✓ Client Reference Sheet
- ✓ Testimonial Phrases – be sure to highlight and italicize key words
- ✓ Track Record/Sales – list yours personally, and the company's
- ✓ "If"
- ✓ "What are you concerned about"
- ✓ "Words of Wisdom" – Tips to help sell your home quickly
- ✓ Listing Contract
- ✓ CMA

Other suggestions:

- Transfer Disclosure Statement
- Business cards – Agent's and Assistant's
- Team Picture
- How do we price your home?
- Any awards info/press releases
- Sample Advertising
- Example of Marketing
- Lower end/Higher price
- Sample flier
- Mission Statement
- Graph/Solds
- Specialty Marketing; i.e.: University References/Doctors/Attorneys
- Yearly Production


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Prelist System (cont.)

Prelist Letter



Assistant Systems for Success

Call 8: The Perfect Listing System

Prelist Letter

DATE

Name (POTENTIAL SELLER)
Address
City, State, Zip

Dear (POTENTIALSELLER),

Thank you for the opportunity to present my qualifications and marketing plan to sell your property. I think of my clients as individuals with specific needs, and my team and I strive to give you exceptional service. In response to the more challenging market we have experienced over the years, we have become more determined and assertive with marketing and technology. This has allowed us to be very successful in securing results for our clients.

As part of my customer service I have enclosed information for your review before our appointment. Enclosed are the following items:


▪ (your name) Resume	Page 1
▪ Team Commitment	Page 2
▪ Marketing Plan of Action.....	Page 3
▪ 800 InfoHomeLine.....	Page 6
▪ Track Record.....	Page 7
▪ References.....	Page 8
▪ Testimonials.....	Page 9
▪ Market Analysis.....	Page 10

On the left side of the packet are the contract and seller disclosures. Please fill out the disclosures before our appointment. This information allows you and me to determine the correct sales price.

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Assistant Systems for Success

Call 8: The Perfect Listing System

Prelist Letter (cont.)

Thank you for the privilege of allowing me to show you my active marketing strategies which can help you realize the highest dollar value for your property while relieving you of the burdens of selling. The most important step in the sales process is choosing the right realtor to effectively and profitably represent your interests.

I look forward to meeting you on _____ at _____ to help you with this process. Please have 2 keys available and a copy of your mortgage statement. I am prepared to answer all of your questions and handle your transaction professionally and successfully.

Sincerely,

(AGENT'S NAME)

Listing Appointment Checklist

HREG : Appt File Check List

Day _____ Date _____ Appointment _____ Time _____ AM - PM Place _____

Property _____

Seller Name _____ City _____ Zip _____

Seller Address _____

Cell # _____ Cell # _____ Zip _____

Email: _____ H W # _____ Other # _____

Owner Occupied: Yes No Vacant: Yes No Email: _____

Map Code _____ Cross Street _____ Tenant Occ: Yes No | Name/phone: _____

Appt Set By: _____ Source _____ Agent _____

APN: _____

www.zillow.com \$ _____

Confirmed _____

Received Packet _____

Spoke With _____

Property Profile Ordered _____

On Office Board _____

Prelist _____ Emailed - Mailed - Delivered - In File _____

Referral fee paid to _____ By Who _____ Date _____

Referral agent information _____ Go Agent's Schedule _____

Agent - Client - Builder - Other _____

Loan Balance \$ _____ HOA Fees \$ _____ List Price \$ _____

Buyer: Yes No Buyers Agent? _____ Sign: Yes No Date: _____

MLS Date _____ Just Listed: Yes No Flyers: Yes No Just Listed: Yes No City: _____

800 Info Home Hotline: Yes No TERMITE: Order Inspection: Yes No Current Pest Company: _____

Seller Relocating? Yes No Where? _____ When: _____

Referral Agent? _____ Motivation? _____

Lock box: Yes No Pet(s)? _____ Kids: _____

Showing Instructions: _____

Special Instructions: _____

Property Features & Notes: _____

Driver: H _____ W _____ Analytical: H _____ W _____ Amiable: H _____ W _____ Expressive: H _____ W _____

1-10 1.
2.
3.

Listings System

[illegible]

Marketing

____ Virtual tour - Promised (yes no) Ordered: _____ Phone: _____
____ Broker open house (yes no) Tour #: _____ Open date: _____
____ Order 100 radius owners with phone numbers from title company.
____ Open House - Promised (yes no)
____ Send Just Listed cards
____ Email Just Listed cards
____ Arch Telecom
____ Personal and/or company website

Disclosures

____ Building permit check
____ Prepare disclosures p
____ Estimate of utilities
____ Well/septic disclosur

Follow Up

____ Assistant to call seller
____ Email seller with link
____ Email to seller an up
____ 21 Day price reduction
____ Calendar 3 weeks' no
____ Seller update - calend
____ Agent to call every 1/

At the Property - Agent tasks

____ Take property photos - interior and exterior
____ Measure rooms. Complete the MLS input sheet on features and details.
____ Complete an Agent's inspection form
____ Install MLS lock box (yes no)
____ Leave 5 envelopes stamped for showing cards
____ Get 2 keys
____ Get all documents signed
____ Leave Executive Assistant's card
____ Ask for referrals

Office Systems

____ Update database information
____ Submit proper information to MLS. Entered on (date) _____
____ Submit photos to MLS
____ Order "for sale" sign
____ Prepare property brochure
____ Email MLS print out to seller
____ Email new listing to top 10 agents
____ "Thank you letter" to seller
____ Broker open house (yes no)
Tour # _____ Open date: _____
____ Termite inspection (yes no) Contractor _____ Date: _____ Phone: _____
____ Roof inspection (yes no) Contractor _____ Date: _____ Phone: _____
____ Physical inspection (yes no) Contractor _____ Date: _____ Phone: _____
____ Search leads for property match
____ Five people to call
1. _____ 2. _____ 3. _____ 4. _____ 5. _____
____ Copy of listing agreement to buyers agent

Price Reduction Checklist

- _____ Change price in MLS
- _____ Print out MLS sheet with price change
- _____ New CMA printed at 21 days
- _____ File to Agent at 21 days

Make copies of MLS sheet and put in the following mailboxes:

- _____ Board at the office
- _____ Print to email all agents that have shown the property
- _____ Change price on listing checklist in listing file
- _____ Change price in lead database
- _____ Print to sign price change form - DocuSign
- _____ Print notes to database
- _____ Print ride

_____ were completed on: _____ by: _____

Checklists

Listings System (cont.)

Communication Log

	Assistant Systems for Success	Call 9: The Perfect Listing System
---	-------------------------------	------------------------------------

Communication Log

Date	Remarks	Next Action

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Listings System (cont.)


Seller Honeymoon Checklist

The Perfect Real Estate Assistant

Session Two
Listing

3 WEEK HONEYMOON OF COMMUNICATION ~ LISTING

WEEK 1



___ 1. Assistant introduction call within 1 hour of receiving the listing using First Call checklist.

___ 2. Thank you for Listing Letter with all signatures of team sent the 1st day.

___ 3. Buyer agent(s) or office to preview within 48 hours.


___ 4. Agent to call and thank you/ask for referrals within first 5 days.

___ 5. Letter with copy of MLS print out sent by mail to seller. Call, email, call.

___ 6. Assistant to call Seller and provide code for their property for 800 InfoHomeLine to hear the recorded message.

___ 7. Assistant to call EVERYDAY of the first 5 days of the listing.

WEEK 2



___ 1. Assistant call to review MLS print out and disclosures....check for mistakes. Must have back by week 2.

___ 2. Email links to personal website, MLS website, Realtor.com, etc.


___ 3. Agent or assistant to call and review showings (including feedback) or 1 lack of showings.

___ 4. Assistant to send out email link to top 50 agents (and copy Seller).

___ 5. Also email sent to entire database of new listing with copy to Seller.

___ 6. Assistant to have at least 2 calls and 3 emails the second week.

WEEK 3



___ 1. New CMA sent to seller with monthly stats.

___ 2. Send a copy of the Plan of Action with checkmarks that all items are completed.

___ 3. Review # of showings and days on market with seller.

___ 4. Agent or Assistant to call for Price Reduction and review showing results or lack of showings.

___ 5. Minimum of 3 contacts this week.

HELLER REAL ESTATE GROUP

TRAINER: MONICA REYNOLDS



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FAMILY
REUNION

Escrow/Closing System

Sale-in-Process Checklist

 Assistant Systems for Success	Call II: Closing Systems	 Assistant Systems for Success	Call II: Closing Systems
---	--------------------------	--	--------------------------

Sale-In-Process Checklist

Price: _____ MLS#: _____
 Address: _____ Source: _____
 Closing Date: _____ Commission: _____ PT: _____

Sellers

Name: _____
 Address: _____ (W)
 Phone: (H) _____
 (C) _____ (W)
 Email: (H) _____

Buyers

Name: _____
 Address: _____ (W)
 Phone: (H) _____
 (C) _____ (W)
 Email: (H) _____

Selling Agent

Name: _____ Company: _____
 Phone: _____ Cell: _____
 Fax: _____ Home: _____
 Email: _____ Pager: _____

Escrow

Officer: _____ Company: _____
 Address: _____ Email: _____
 Phone: _____ Fax: _____
 Escrow #: _____

dist (cont.)

_____ Company: _____
 _____ Email: _____
 _____ Fax: _____
 _____ Company: _____
 _____ Email: _____ Fax: _____
 _____ Binder: _____

Date Received _____
 Verification _____
 Buyer Approval _____
 e Received _____ Buyer Letter of Approval _____
 Date Received _____ FICO Score: _____

Signatures on all contracts _____
 edures/what to expect _____

ines	used	Extension	Completed

Accepted: _____
 Accepted: _____
 Instructions Received _____
 Confirmation Agent: _____
 Confirmation Agent: _____
 Report on File _____
 In File _____
 Sent _____ Received _____
 Received from Buyer _____
 d Seller/Received _____
 id Seller/Received _____
 ceived Seller/Received _____
 Seller/Received _____

Jp _____
 Contact: _____
 Fax _____
 ordered _____ Date of Work: _____
 Tenants Notified: _____
 it _____ Cell _____
 Seller notified _____ Time _____
 Comps to Appraiser _____
 2nd Verification _____
 Time Frame _____

phone _____
 Completed: _____


ed for Buyer / Seller _____

Counter-Offer Clause

n application and fico score be submitted to Seller's lender for
 ce.

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Escrow/Closing System (cont.)

Assistant Systems for Success

Call 10: Closing Systems

Pending Sale Letter

DATE

Name (SELLER)
Address
City, State, Zip

Dear (SELLER),

Congratulations on selling your house! Thank you for letting us help. _____ (agent's name) asked me to send you this letter, as part of our customer service, and explain what happens now. Enclosed please find a copy of the contract on your house. Be sure to keep this in your records. From now until closing, our Closing Manager and I will primarily handle the process, and _____ (agent's name) will also be available for questions. The process is as follows.


- 1) I have sent a copy of the ratified contract to all parties, including the buyer, closing attorney, and buyer's lender. I will be in constant contact with the closing attorney, Buyer's lender and the Buyer's Agent to ensure they have everything they need from now until closing
- 2) Before the deadline in the contract, the Buyer will schedule an inspection of your home, and we will contact you to arrange a good time.
- 3) I will contact you for any needed information regarding payoff of your loan, Homeowner's Association, your new address, current flood insurance, etc.
- 4) Before the deadline in the contract, the Buyer's agent will present us the results of the inspection report and _____ (Closing Manager) will contact you about this. If repairs are necessary, he will help you make arrangements with a contractor.
- 5) SOLD sign is put up.
- 6) I will contact you about getting the termite inspection done before the deadline in the contract; should repairs or evaluation by a contractor be necessary, _____ (Closing Manager) will contact you to arrange this. (Usually, we wait until buyer has final loan approval before ordering the inspection.)
- 7) A week or two before the closing, I will contact you to schedule the time and date of closing.

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Pending Sale Letter

Assistant Systems for Success

Call 10: Closing Systems

Pending Sale Letter (cont.)

- 8) Utilities: Once we know the date of closing, you will need to contact all of your utility companies and schedule them to be turned off/transferred. For power, water and sewer, call the customer service number and tell them you are moving and you would like a final reading done on the day of closing and the service ended in your name (this will allow the buyers to call and have it transferred to their name.) You will also need to contact providers of your cable, internet, satellite, etc., and cancel or transfer them to your new address.
- 9) Within 48 hours before closing, the attorney will fax the HUD-1 (closing statement) to all parties to verify that the numbers are correct. After corrections have been made, _____ (Closing Manager) will contact you to let you know the final numbers and how much money you will receive at closing
- 10) _____ (Closing Manager) will attend closing with you.

As always, if you need anything, don't hesitate to call us at _____ or email us at _____, and remember that you have a whole team working for you.

Sincerely,


(TRANSACTION COORDINATOR)

We Appreciate Your Referrals!!

Here's a quick reference of the deadlines in the contract.

INSPECTION	CL100	APPRAISAL	LOAN APPROVAL	CLOSING

Escrow/Closing System (cont.)

 Assistant Systems for Success

Call 10: Closing Systems

Colleague Thank You Letter

DATE

Name (OTHER AGENT)
Address
City, State, Zip

Dear (OTHER AGENT),

In spite of the challenges presented in 20__, we enjoyed another successful year in real estate, and I want to thank you for selling one of my listings last year. I appreciate your helping me provide my sellers the best service possible. Our continued cooperation is essential in maintaining the positive real estate community we now enjoy. You can rely on me to always work for a smooth transaction.

In return, I will certainly keep your listings in mind for my own clients and would appreciate your continued help in the future.

Your Real Estate Colleague,

(AGENT'S NAME)

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Thank You
Colleague Letter

Escrow/Closing System (cont.)

Orphan Clients

	Assistant Systems for Success	Call 10: Closing Systems
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Orphan Buyer Letter

DATE

Robert Blair
1754 Calle Platico
Oceanside, CA 92056

Dear Robert,

Congratulations on your new property! In this market we know you had many choices and we wanted to take the time to thank you for selecting one of our listings. We hope you will be very happy in your new home.

If there is anything we can do to make your move easier or any questions you might have about the area, please don't hesitate to call us at (760) 632-8408.

Below is information regarding your Home Warranty.

Best Personal Regards,

Chris Heller

Monica Reynolds

(760) 632-8408
www.hellerthehomeseller.com
DRE#00851991

Fidelity Home Warranty
Order # H77004
Ph: 1-800-308-1422

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Escrow/Closing System (cont.)

The Perfect Real Estate Assistant

Session Two
Listing

3 WEEK HONEYMOON OF COMMUNICATION ~ ESCROW

WEEK 1



1. Introductory congratulations call from Shannon within 1hr of receiving file. (Congratulations, Contact information verified, hours, etc.)


2. Email from Shannon with contact information for Shannon and hours available.

3. Call going over all closing information and time frames for the next 2 weeks. "What will happen next"

4. Congratulations letter from Chris and Monica with Closing Information. (basically restating what has been said on Call #2) (call~ email~ call)

5. Copy of executed contract in PDF or hard copy sent to seller/buyer who we represent.

6. Seller sent a list of contingencies and dates of removals.


7. Seller to receive  call from Monica for Congratulations/ask for Referrals.

8. First week, minimum 5 phone calls, 5 emails. Seller or Buyer to receive minimum of 1 call per day.

9. Appraisal date set up.

10. Call to other agent....listing/buyer...set up expectations, contact info, assistants name, etc.

WEEK 2



1. Shannon confirms all times regarding inspections with seller /buyer.

2. Seller to receive Property Conveyance Checklist.

3. Shannon to set stage for repairs, call, email, call with negotiations. Email sent with request for repairs.

4. Kara to send out 250 "Just Sold" cards.

5. Email to selling agent with update...should be done every Friday.

HELLER REAL ESTATE GROUP


TRAINER: MONICA REYNOLDS

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The Perfect Real Estate Assistant

Session Two
Listing

WEEK 3



1. Home Inspector report /information furnished and negotiated successfully.

2. Send copies of all contingency removal to Seller and Agent.

3. Congratulations letter sent out with a confirmation of move-out date and copy of Property Conveyance.

4. Thank you note from Chris and Monica to agent who sold property.

5. Call from Monica....Congratulations to Seller/ Buyer all contingencies removed.

HELLER REAL ESTATE GROUP

TRAINER: MONICA REYNOLDS

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Escrow Honeymoon Checklist

FAMILY
REUNION

32 The Perfect Real Estate Assistant

On the Market Neighbor Letter

How to use this letter:

1. When the client signs the listing, you tell them that part of your strategic marketing is to notify the neighbors. Here is a sample letter that you would like to personalize for them. Get permission and make it personal.
2. You will mail it to the neighbors with a brochure, and your business card.
3. The return label will be their name and address.
4. Great to door knock with this letter and brochure

Dear (NAME),

We are your neighbors who live at _____. (something personal here)

(Examples: I own the green house on the corner with the red door. My wife and I have lived in the neighborhood for 7 years. I am also the person who walks my dog, a big German Sheppard every evening at 5. Our kids attend the Middle School.)

We are moving and we have listed our home with Keller Williams Realty, *(Heller the Home Seller)*. The reason we are writing you is to ask a favor. . . .

Should you know of anyone who would like to live in our neighborhood please forward our information to them. Feel free to give it to any of your friends, family, or co-workers that may be interested in our property or might know someone who is.

We have loved living here and hope to find a buyer that will feel the same. We really appreciate your help.

OPTIONAL WHEN YOU HAVE AN OPEN HOUSE

Also we are having an open house just for neighbors only to see our home on Sunday from 12-1. We will have lemonade and cookies and great way to see your neighbors!

Please come by and say hello. The 12-1 is just for neighbors. The public open house is from 1-4. If you know of anyone who should see our home, please send them Sunday to our house.

Enclosed also is my agent's business card. Please call _____ if you have any other questions and again, thank you for your help!

Just Sold Neighbor Letter

How to use this letter:

1. Send this letter out immediately when it goes under contract.
2. Enclose your business card.
3. Use it door knocking.
4. Use a return address from the seller.

Dear *(NAME)*,

We are writing to let you know that our agent found us a great buyer for our home!

Thanks to *(HELLER THE HOME SELLER)*, we've sold our house!

Several of the neighbors sent us potential buyers, so thank you all! We promised our agent if they did a great job for us, we'd send out their card to everyone, so please find that enclosed.


Thank you again and we wish you the best! We will miss this place, and we're excited for our next steps.

Sincerely,

(Name of Client)

Tracking Numbers System

Lead Follow-Up Worksheet

	Assistant Systems for Success	Call 13: Lead Generation Systems
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Lead Follow-Up Worksheet

70% OF ALL DEALS COME FROM LEAD FOLLOW-UP

LEAD NAME	SOURCE	DATE	PRICE	B/S	TIMEFRAME	APPT. SET	PHONE NUMBER

9/9/2011

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Tracking Numbers System (cont.)

MAPS

by

RE/MAX

Assistant Systems for Success

Call 13: Lead Generation Systems

Daily Tracking (cont.)

APPOINTMENTS								TRANSACTIONS															
								SOLD				CLOSED											
DATE	PROPERTY ADDRESS	COURT	AGENT	TAKEN	NOT TAKEN	REFUSE	PRICE	DATE	PROPERTY ADDRESS	SELLER	BUYER	COURT	PRICE	AGENT	DATE	PROPERTY ADDRESS	SELLER	BUYER	COURT	PRICE	AGENT		
7/15/2011	1022 Via Santa Cruz	Nova	AM	Y				7/15/2011	2560 Montwood			SC	519,000.00	Jay	7/15/2011	12414 Cypress Ridge			Arif	460,000.00	AM		
7/15/2011	18124 Comisita Juvial	KOSO	AM	Y				7/16/2011	12413 Malibu Way			RED	224,000.00	Dvir	7/16/2011	10413 Shalimar			Arif	330,000.00	AM		
7/15/2011	5720Paseo del Norte	Nova	AM	Y				7/17/2011	18175 Malibu			Drum	449,000.00	Dvir	7/15/2011	1531 Camacho Court			COI	140,000.00	Sarah		
7/15/2011	12655 Monica Summit Pl	KOSO	AM	Y				7/17/2011	4725 Ayres			NFHD	225,000.00	AM	7/15/2011	2400 Akkiva #2			Hvac	120,000.00	Dvir		
7/15/2011	27041 Rio San Diego Dr	Nova	AM	Y				7/17/2011	1045 Vista de la Montana			KOSO	460,000.00	AM	7/15/2011	1045 Pavia Villa			KOSO	415,000.00	AM		
7/15/2011	4226Mesa Way	KOSO	AM	Y				7/17/2011	1228Washburne			PC	442,000.00	Sarah	7/15/2011	2182 Ulises			RED	442,000.00	Dvir		
7/15/2011	31121 Skardam	KOSO	AM	Y				7/17/2011	3378 Camo Torral			BRET	445,000.00	AM	7/15/2011	542 Susana Fern			Arif	249,500.00	Sarah		
7/15/2011	350 Hampshire Ln	KOSO	AM	Y				7/17/2011	5520 Camo Del Rio			RED	529,000.00	Dvir	7/15/2011	374 San Luis Pab			COI	167,000.00	Dvir		
7/15/2011	17655 Teller Lane Dr	KOSO	AM	Y				7/17/2011	5227 Malibu Ridge			NFHD	1,740,000.00	AM	7/15/2011	5415 Camacho Pl			KOSO	210,500.00	Dvir		
7/15/2011	2122 Lido Dr St	Arif	AM	Y				7/17/2011	2442 San Luis Rey			COI	247,000.00	Dvir	7/15/2011	1200 Orla Vista			Arif	425,000.00	AM		
7/15/2011	1515 Duane Pl	Drif	AM	Y				7/17/2011	14376 Caliente			Arif	460,000.00	AM	7/15/2011	1774 Orla Ave			SC	1,350,000.00	Mary		
7/15/2011	1307 Grand Ave	EIP	AM	Y				7/17/2011	9646 Lakewood			SC	319,000.00	Jay	7/15/2011	415 Aurora Way			Trif	912,500.00	AM		
7/15/2011	14333 Kings Villa Rd	KOSO	AM	Y				7/17/2011	11944 Brentway			BRET	949,000.00	Sarah	7/15/2011	415 Aurora Way			SC	912,500.00	AM		
7/15/2011	4521 Linda Way	PO	AM	Y				7/17/2011	5605 Alta Vista			PO	170,000.00	AM	7/15/2011	415 Aurora Way			SC	912,500.00	AM		
7/15/2011	2455 Summit Dr	KOSO	AM	Y				7/17/2011	4225 Hillview			KOSO	222,500.00	AM	7/15/2011	2440 La Cuesta A			JLWS	525,000.00	DLS		
7/15/2011	5741 Camacho Del Rio	KOSO	AM	Y				7/17/2011	7845 Camacho Camacho			PC	1,345,000.00	Dvir									
7/15/2011	4958 Ventura St	Trulia	AM	Y				7/17/2011	7845 Camacho Camacho			INT	1,345,000.00	Mary									
7/15/2011	7516 Avenida Pl	EIP	AM	Y				7/17/2011	1241 Malibu Way			RED	449,000.00	Dvir									
7/15/2011	1500 Orangeview Dr	Trif	AM	Y				7/17/2011	1251 Buena Vista Pl			RED	242,000.00	Dvir									
7/15/2011	1227 Regal Ave	KOSO	AM	Y				7/17/2011	14147 Camacho Camacho			KFMR	475,000.00	AM									
7/15/2011	12351 Regal Ave	EIP	AM	Y				7/17/2011	437 Davis			KOSO	425,000.00	AM									
7/15/2011	9447 Quince Pointe	EIP	AM	Y				7/17/2011	2568 Pavia del Mar California #1			KFMR	145,000.00	Dvir									
7/15/2011	1445 Lauren Ct	PO	AM	Y				7/17/2011	1031 Greenwood Rd			RED	350,000.00	Dvir									
7/15/2011	14600 El Ombelle	PO	AM	Y				7/17/2011	700 Quakilla			DIP	257,000.00	AM									
7/15/2011	14620 Evening Star Dr	EIP	AM	Y				7/17/2011	1425 Malibuview			Drum	435,000.00	Dvir									
7/15/2011	5772 Mount	KOSO	AM	Y				7/17/2011	140 California Oaks			PC	376,000.00	AM									
7/15/2011	2457 Parkside	EIP	AM	Y																			
7/15/2011	1400 Haystack Ave	PO	AM	Y																			
7/15/2011	12527 El Ombelle Blvd	EIP	AM	Y																			
7/15/2011	1671 Via Del Camacho	KOSO	AM	Y																			
7/15/2011	550 Summit Way #2	Drum	AM	Y																			
7/15/2011	2258 Orchard View Ln	KOSO	AM	Y																			
7/15/2011	35174 Via Ochoa Ln	KOSO	AM	Y																			
7/15/2011	2759 ECL	KTHB	AM	Y																			
Totals				21	9	3	9	Totals				23	3	3,445,000		Totals				20	4	5,571,000	
* appt. in June, taken in July																							
PRICE REDUCTIONS				DEALS FELL THROUGH				CANCELLED															
DATE	PROPERTY ADDRESS	DATE	NEW PRIC	DATE	PROPERTY	REASON		DATE	PROPERTY	REASON													
7/15/2011	17944 Browder Ct	9/25-9/29 85%		7/15/2011	Reduphiner	S		7/15/2011	Washburne	S													
7/15/2011	25-291 Nica Valley Dr	9/25-9/29 85%		7/15/2011	12633 Montwood	S																	
7/15/2011	11600 Camino del Rio N	100-250 85%		7/15/2011	12633 Montwood	S																	
7/15/2011	3367 Cambridge Ct	345-445 85%		7/15/2011	12633 Montwood	S																	
7/15/2011	1279 Cypress Dr	345-375 85%		7/15/2011	12633 Montwood	S																	
7/15/2011	4937-35 Saratoga	415-525 85%																					
7/15/2011	12467 Via Ochoa	240-500 85%																					
7/15/2011	12400 El Ombelle	245-405 85%																					
7/15/2011	3367 Cambridge Ct	345-409 85%																					
Totals				9	Totals				4	Weekly Totals				3									

Tracking Numbers System (cont.)

Buyer Board

[illegible]

Customer Service System

MAPS

Assistant Systems for Success

Call 11: Closing Systems

Assistant and Agent Weekly Communication Scripts

Assistant First Call Script
Day One ... opening escrow!

"Good Morning, this is _____ (your name) with _____ team . Congratulations _____ (person's name) on the sale of your home/ Congratulations on the purchase of your new home!

As part of _____ (agents name) customer service I am calling to introduce myself. I will be coordinating the sales process of your home.

_____ (Person's name: "Is this a good time to speak for a couple of minutes?"

Great! (the following items are what you should cover)

1. Go over your contact information and seller/buyer information. Get all phone numbers and emails.(h&w)
2. Go over how the seller/buyer wants to be contacted. What is best for them?
3. Go over closing company: escrow opened, company name, or attorney office or title company.
4. Go over time lines for the deadlines, inspections etc.
5. Tell them you are sending a letter with this information and your business card.
6. Tell them you are also sending an email with this information and your contact information.
7. Establish time you will speaking to them weekly, also let them know you are available for their calls anytime.

"Do you have any other questions for me at this time? Is there anything else I can do to make this a great experience for you?"

"Again, Congratulations on the sale/purchase of your home. Please call me anytime if you have any questions. I look forward to speak to you on Tuesdays between 11:00-1:00 as part of _____ (agent's name) customer service to give you a weekly update.

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MAPS

Assistant Systems for Success

Call 10: Closing Systems

After Close Customer for Life Checklist for Buyer and Seller

Note: This Checklist is for the listing agent to communicate after the sale with the Seller(s) and adopting the Buyer(s).

- _____ 1. Phone number of Buyer(s)
- _____ 2. Phone numbers of Seller(s)
- _____ 3. New address for Seller(s)
- _____ 4. Email addresses for Buyer(s)
- _____ 5. Email addresses for Seller(s)
- _____ 6. Thank you letter to Affiliates
- _____ 7. Thank you letter to other Agent
- _____ 8. Agent calls Buyer(s) 1 week after sale
- _____ 9. Agent calls Seller(s) (if represented them) day of closing or day after (if did not see them at closing)
- _____ 10. Agent sends Buyer(s) a "thank you for purchasing my listing" letter 2 weeks after closing.
- _____ 11. Agent sends Seller(s) a thank you letter and customer survey.
- _____ 12. Agent calls Seller(s) 30 days after closing to "check-in".
- _____ 13. Agent does "drive-by" and door-knock the Buyer(s) within 30 days.
- _____ 14. After 30 days, the Seller(s) and Buyer(s) are in the "client for life program" and receive 4 mailings, 6 emails, and 4 phone calls per year.

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\$24,000 LESSON

Below is a copy of an email an agent, Chris Heller (San Diego, CA), sent to his team. This illustrates the importance of Customer Service and what may happen when a client's expectations are not met.

Team,

We had a seller cancel after being listed with us for one week, and there was not one thing they said that I did not disagree with, I'm embarrassed, disappointed and not happy.

Just so we are clear (most of you have heard this before) when a client hires us, they have done so because they want the best! And they expect just that, their expectations are extremely high and rightfully so. At that point their confidence is at its highest, and our job is to keep it there by doing what we say we do and communicating often and clearly. You see a little thing like a sign not showing up when they were told it would be there causes them to question whether we are too busy or whether they are important to us. It is just a sign to us, to them EVERYTHING IS A BIG DEAL, this process of selling is the biggest thing going on in their lives!!! We need to treat it that way. When our sales partners don't go see their home within 5 days like they were told, their confidence in us goes down, when the write up or photos are not world class, we lose credibility. When the client sends an email to the entire team, with information that is important to them and us and **not a single person** has the common courtesy, or common sense to reply, what does it say????????? I know this, it doesn't scream "**you are important, we care about you, you chose the right agency!**"

I hope that every person reading this is bothered by it, because if not then you should be looking at whether you are up to being on the best team in San Diego, please be honest with yourself and with me. If you are who I think you are, then take this as a valuable lesson (because we just paid \$24,000 for it), and learn and realize how important **Customer Service** is.

So that we can all focus, learn and remember, I want each of you to take a minute and reply to this email with a sentence or two on what your definition of **Customer Service** is or should look like for our team. Thank you for looking!

Chris

Hiring System

1. Does the need justify a new hire?
2. Write a job description.
3. Submit an advertisement.
4. Ask for referrals ... affiliates.
5. Check references.
6. Check skills.
7. Do not hire on the spot.
8. First impression ... how important?
9. Administer DISC test.
10. Administer a value test.

Hiring System (cont.)

EXECUTIVE ASSISTANT

Immediate opening for assistant real estate executive.

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

This is NOT an entry-level position.

Please indicate salary desired.

The first step is to email your résumé to:

Email: _____

Hiring System (cont.)

RESUME CHECKLIST



General review:

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

Consistent job flow and applicable experience:

- Check work experience for applicability: Is the person applying, length of time in each position, awards received, reason for leaving each position?
- Is there a consistent job flow? You do not want someone who has a job change every six months.
- Note gaps in employment but do not assume negative reasons.

Customer service background:

You want someone with customer service skills and experience.

Real estate background:

Someone already in the industry brings with them a knowledge of the business and saves training time.

Educational background:

This can give you an idea of the applicant's motivation for self-advancement, although it is not a guarantee. Check educational background for successful job performance.

Specific job skills and training:

Note specific skills and training. Some applicants may have various computer programs/software, office equipment, etc. Can indicate the applicant is easy to cross-train and adapt readily.

TIPS FOR SUCCESSFUL INTERVIEWS



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

1. Try to put the applicant at ease right away at the beginning of the interview. If the applicant feels comfortable, he/she will be more likely to share information.
2. If you find that the applicant freezes on a particular question, go on to the next question. It takes time for some applicants to relax and feel comfortable with the interviewing process.
3. Try to ask questions that facilitate discussion; avoid questions that require a "yes" or "no" answer.
4. Don't ask leading questions. Keep the questions open-ended so that the applicant has the opportunity to speak freely.
5. Be sure to ask only job-related questions.
6. Listening skills are essential in an interview. It is important to let the applicant speak without interruption. Remember, the purpose of the interview is to obtain as much information as possible.
7. While the applicant is speaking, watch his/her body language and facial expressions. These expressions will provide you with additional insight about what is being discussed at the time.

SECOND INTERVIEW QUESTIONS



1. Where do you hope to be in five years?
2. What do you think it takes to be a successful real estate agent? Have you personally ever worked with an agent?
3. Describe the time you were most motivated at any of your previous jobs.

FIRST INTERVIEW QUESTIONS



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

Hiring System (cont.)

INTERVIEW RATING SHEET



Name of Prospective Employee: _____

Date and Time of interview: _____ Time Arrived: _____

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

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

General Comments: _____

ORIENTATION CHECKLIST



NAME: _____ DATE: _____

INTRODUCTIONS AND TOURS

_____ 1. Introduced to co-workers, staff, and manager in office

- _____ 2. Tour of facility, including:
- Rest rooms
 - Mail rooms
 - Bulletin boards
 - In-boxes and message slots
 - Office supplies
 - Copy center
 - Fax machines and printers
 - Kitchen
 - Coffee/vending machines
 - Water coolers
 - Emergency exits and emergency equipment
 - Parking arrangements

POLICIES AND PROCEDURES

_____ 3. Provided copy of Policy and Procedure Manual.

- _____ 4. Reviewed Policies and Procedures including:
- Starting and quitting times, lunch hour, breaks, etc...
 - Explained sick, vacation and holiday policy
 - Time and leave reporting
 - Reviewed Compensation Schedule, payroll timing
 - Discussed overtime
 - Discussed dress code
 - Reviewed emergency procedures
 - Discussed visitors
 - Discussed email and internet usage

POSITION INFORMATION

_____ 5. Reviewed job description, performance expectations and standards.

_____ 6. Reviewed probationary period and performance evaluations

_____ 7. Reviewed initial job assignments and training plans.

CREATING A PERMANENT EMPLOYEE FILE

Each staff person should have an Employee File that is a permanent record of important information.

The Employee File:

- Contains confidential information
- Should be maintained in a locked file drawer

Include the following documents in the Employee File:

1. Original employment application
2. Rating form
3. Previous reference checks and comments
4. Any tests used to evaluate skills during the interview (i.e., typed letter)
5. Social Security Number, withholding records
6. Signed Confidentiality Agreement
7. Signed Job Description (by assistant and agent)
8. Signed Orientation Checklist
9. 90 Day / Yearly Evaluations
10. Benefit information (as applicable)
11. Record of completed training (as applicable)
12. Copy of license (if applicable)
13. Compensation Record

Developing Systems for Success

1. Your systems create the business.
2. When the systems are in your head ... it prevents delegating and building a duplicable business.
3. As you create systems, write them down and create a checklist.
4. Manualize all your systems.
5. Create the systems/checklists by listing everything you do. Put it in a logical order.
6. Having systems in place takes the stress out of the business and creates a great experience for buyers and sellers.

What Systems Will Create for You

- **OPERATIVE EXCELLENCE:**
 - Systems will improve efficiency, ultimately leading to higher profits.
- **CUSTOMER SATISFACTION:**
 - When a business serves its customers well, the customers respond by returning.
- **COMPETITIVE ADVANTAGE:**
 - Serving your customers better than anyone else leads to more sales. Well-serviced clients will tell everyone. Poorly serviced clients will tell everyone.
- **BETTER DECISION-MAKING PROCESS:**
 - When you follow a system, it quickly becomes apparent when you are successfully following it, or when you are not. The path is clear. The process allows for effective delegation.

What Systems Do You Have in Place?

1. Communication system
2. Prelist system
3. Listing system
4. Closing system
5. Customer service system
6. Expired system
7. FSBO system
8. Database system
9. Hiring system
10. Lead generation system
11. Tracking numbers system
12. Buyer system
13. Affiliate system
14. Short Sale system
15. Marketing system
16. REO system
17. Budget system
18. Tracking expenses system
19. Internet/website system
20. Price reduction system
21. Goal setting system
22. Market statistics system

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The Perfect Assistant—\$199/mo. for 6 months.

- 18 webinars/group calls—one hour each
- 3 calls per month
- First call each month for agents only teaching you how to be a great boss
- Next class: Wed, March 11, 2:00pm CT

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- 18 webinars/group calls—one hour each
- 3 calls per month
- All calls are for assistants only
- Must have completed The Perfect Assistant
- Next class: Thu, March 11, 2:00pm CT

Thank You!

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