The Perfect Real Estate Assistant

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Listing Specialist/Partner of the Heller Real Estate Group

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#KWFRT
Tell Keller Williams University what you think!
Simply enter

www.evalfr.com

into any mobile device to complete your 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

Heller Group Team Member since ______

SHANNON O’BRIEN

- 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
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?

Assistants, Do You Know Your Boss’s Job Description?

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

The Perfect Real Estate Assistant

Job Description Sample 1

Goals
- To help the agent access listings
- To help the agent access marketing
- To assist the agent in developing client relationships
- To assist the agent in generating leads

Duties
- Maintain real estate database
- Assist in preparing proposals
- Prepare and maintain client files

Responsibilities
- Answer phone calls
- Schedule appointments
- Prepare and distribute brochures
- Maintain client records

Job Description Sample 1 (cont.)

Description Sample 1 (cont.)

-listings
- Handle phone calls
- Assist in preparing proposals
- Prepare and maintain client files

Job Description Sample 1 (cont.)

AFTER OFFER IS RECEIVED

- Prepare and submit offer
- Follow up with buyers
- Prepare and maintain client files

Job Description Sample 1 (cont.)

AFTER CLOSING

- Follow up with buyers
- Prepare and maintain client files
- Prepare and submit offer

Job Description Sample 1 (cont.)

Job Description Sample 2

Goals
- To help the client access listings
- To help the client access marketing
- To assist the client in developing client relationships
- To assist the client in generating leads

Duties
- Maintain real estate database
- Assist in preparing proposals
- Prepare and maintain client files

Responsibilities
- Answer phone calls
- Schedule appointments
- Prepare and distribute brochures
- Maintain client records

Job Description Sample 2 (cont.)

Description Sample 2 (cont.)

-listings
- Handle phone calls
- Assist in preparing proposals
- Prepare and maintain client files

Job Description Sample 2 (cont.)

AFTER OFFER IS RECEIVED

- Prepare and submit offer
- Follow up with buyers
- Prepare and maintain client files

Job Description Sample 2 (cont.)

AFTER CLOSING

- Follow up with buyers
- Prepare and maintain client files
- Prepare and submit offer

Job Description Sample 2 (cont.)
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_____.

How many times have your emails been interpreted incorrectly?
Communication System (cont.)
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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.
"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
Agent/Assistant Year-end Mastermind

1. If you were CEO of my company, what would you do differently? Why? How would you implement?
   a. 
   b. 

2. Being two success stories, they can be about a system or client related to share with the group.

3. Give me two ideas on ways you think I can improve customer service.
   a. 
   b. 

4. Give me two ideas on ways you think I can increase business.
   a. 
   b. 

5. Give me three ways to decrease expenses.
   a. 
   b. 
   c. 

6. Give me two ways that as a team we can be more effective.
   a. 
   b. 

7. How can I support you being more effective in the team every month?

8. What are two challenges/problems you would like to mastermind with the group to help resolve?
   a. 
   b.
Prelist Package

Prelist Package

- Hand deliver, mail, or delegate this package - use a personalized 9.5 x 11 envelope or a company logo envelope.
- Personalize the agent prior to appointment
- Keep it simple
- 6-8 pages only
- Agent must go over hourly 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 utilize 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 Name
- How do we price your home?
- Any attend / home / garden releases
- Sample Advertising
- Example of Marketing
- Logo and High Res.
- Sample files
- Mission Statement
- Graph/Sells
- Specialty Marketing - i.e. University / Realtors / Doctors / Attorneys
- Yearly Production

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Prelist System (cont.)

Prelist Letter

DATE

Name (POTENTIAL SELLER)
Address
City, State, Zip

Dear (POTENTIAL SELLER),

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

- Resume
- Team Commitment
- Marketing Plan of Action
- InfoHomeLine
- Task Record
- References
- Testimonials
- Market Analysis

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

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 burden 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 ________ 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

<table>
<thead>
<tr>
<th>Task</th>
<th>Description</th>
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<tbody>
<tr>
<td>1.</td>
<td>Prepare appointment schedule</td>
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<td>2.</td>
<td>Notify client of appointment</td>
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<tr>
<td>3.</td>
<td>Greet client warmly</td>
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<tr>
<td>4.</td>
<td>Gather necessary documents</td>
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<td>5.</td>
<td>Conduct property tour</td>
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<tr>
<td>6.</td>
<td>Answer client’s questions</td>
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<tr>
<td>7.</td>
<td>Follow up after appointment</td>
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</table>

**Note:** Ensure all tasks are completed before the appointment.
Listings System

Checklists
Listings System (cont.)

Communication Log

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<tr>
<th>Date</th>
<th>Remarks</th>
<th>Next Action</th>
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Listings System (cont.)

Seller Honeymoon Checklist

The Perfect Real Estate Assistant

3 WEEK HONEYMOON OF COMMUNICATION - LISTING

**WEEK 1**

1. Assistant introduction call within 1 hour of receiving the listing using Phone Call scheduling.
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 information line 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 memo 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 checkboxes that all items are completed.
3. Revive # 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.

Hayden Real Estate Group
The Perfect Real Estate Assistant

27
Escrow/Closing System

Sale-in-Process Checklist
Pending Sale Letter

DATE

Name (SELLER)
Address
City, State, Zip

Dear (SELLER),

Congratulations on selling your home! 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 next. Enclosed please find a copy of the contract on your home. Be sure to keep this in your records. From now until closing, our Closing Manager and I will personally 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 buyers, 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, Homesteaders 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. (Closing Manager) will contact you about this. If repairs are necessary, he will help you make arrangements with a contractor.

5) SOLD signs are put up.

6) I will contact you about getting the tenant inspection done before the deadline in the contract. Should repairs be necessary or a condition be necessary, (Closing Manager) will contact you (Closing Manager) will contact you to arrange this. Usually, we want 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 date of closing.

As always, if you need anything, don’t hesitate to call me at _________ or email me 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.

<table>
<thead>
<tr>
<th>Inspection</th>
<th>CL100</th>
<th>Appraisal</th>
<th>Loan Approval</th>
<th>Closing</th>
</tr>
</thead>
</table>

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Thank You Colleague Letter
Orphan Clients

The Perfect Real Estate Assistant
Escrow/Closing System (cont.)

3 WEEK HONEYMOON OF COMMUNICATION - ESCROW

WEK 1

1. Introductory congratulations call from Shannon within 3rd of moving in. 
   Congratulations, contact information verified, taxes, 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.
   Briefly reviewing 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 duties of removals.
7. Seller to receive a call from Monica for congratulations/task for Rehearsal.
8. First week: minimum 5 phone calls, 3 emails. Seller or Buyer to receive a minimum of 1 call per day.
9. Appraisal date set up.
10. Call to other agent... listing/buyer... set up expectations, contact info, assignment letters, etc.

WEK 2

1. Shannon confirms all times regarding inspections with seller/buyer.
2. Seller to receive Property Contingency Checklist.
3. Shannon to review Property Contingency Checklist.
4. Shannon to set up a repair list, call, email, call with negotiations. Email sent with request for repairs.
5. Karen to send out 250 "Just Sold" cards.
6. Email to selling agent with updates... should be done every Friday.
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 [address]. (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 Shepherd every evening at 5. Our kids attend the Middle School.)

We are moving and we have listed our home with Keller Williams Realty, (Keller 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 [phone number] 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 for 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 (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

70% of all deals come from lead follow-up

<table>
<thead>
<tr>
<th>Lead Name</th>
<th>Source</th>
<th>Date</th>
<th>Price</th>
<th>RV</th>
<th>Timeframe</th>
<th>Appointment Set</th>
<th>Phone Number</th>
</tr>
</thead>
</table>

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### Daily Tracking (cont.)

<table>
<thead>
<tr>
<th>Date</th>
<th>Name</th>
<th>Address</th>
<th>Phone</th>
<th>Email</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>01/01/2023</td>
<td>John Doe</td>
<td>123 Main St</td>
<td>555-1234</td>
<td><a href="mailto:johndoe@email.com">johndoe@email.com</a></td>
<td>New lead</td>
</tr>
<tr>
<td>01/02/2023</td>
<td>Jane Smith</td>
<td>456 Oak Ave</td>
<td>555-5678</td>
<td><a href="mailto:janesmith@email.com">janesmith@email.com</a></td>
<td>Follow-up call</td>
</tr>
<tr>
<td>01/03/2023</td>
<td>Bob Johnson</td>
<td>789 Elm Rd</td>
<td>555-9876</td>
<td><a href="mailto:bobjohnson@email.com">bobjohnson@email.com</a></td>
<td>New listing opportunity</td>
</tr>
</tbody>
</table>

**Notes:**
- New lead: New contact for potential real estate services.
- Follow-up call: Call to follow up on existing contact.
- New listing opportunity: Potential new listing to pursue.

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### Call 13: Lead Generation Systems

- **Assistant Systems for Success**
- **Call 13: Lead Generation Systems**

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**FAMILY REUNION**

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36  The Perfect Real Estate Assistant
### Tracking Numbers System (cont.)

**Buyer Board**

<table>
<thead>
<tr>
<th>Name</th>
<th>Doe</th>
<th>Smith</th>
<th>Johnson</th>
<th>Brown</th>
<th>White</th>
<th>Black</th>
<th>Green</th>
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</thead>
<tbody>
<tr>
<td>Phone</td>
<td>123-456</td>
<td>789-012</td>
<td>345-678</td>
<td>890-098</td>
<td>456-789</td>
<td>987-654</td>
<td>567-890</td>
</tr>
<tr>
<td>Email</td>
<td><a href="mailto:does@example.com">does@example.com</a></td>
<td><a href="mailto:smith@example.com">smith@example.com</a></td>
<td><a href="mailto:johnson@example.com">johnson@example.com</a></td>
<td><a href="mailto:brown@example.com">brown@example.com</a></td>
<td><a href="mailto:white@example.com">white@example.com</a></td>
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37 The Perfect Real Estate Assistant
Customer Service System

Assistant and Agent Weekly Communication Scripts

Assistant First Call Script

Dear [Client’s Name],

Thank you for choosing [Company Name]. Congratulations on your new home!

[Agent’s Name], your [Company Name] agent, is thrilled to welcome you to our family. As your trusted advisor, [Agent’s Name] will be here to help guide you through the exciting journey of homeownership.

[Agent’s Name] has a vast pool of resources to ensure that your needs are met. Whether it’s finding the right financing options or taking care of the legal aspects, [Agent’s Name] is your go-to person. [Agent’s Name] is available [Contact Information].

We are steadfast in our commitment to customer satisfaction. If you have any questions or concerns, please do not hesitate to reach out. [Agent’s Name] is just a call or email away.

Thank you for choosing [Company Name]. We are honored to be a part of your journey. [Agent’s Name] looks forward to serving you.

Best regards,

[Company Name]

After Close Customer for Life Checklist for Buyer and Seller

Note: This Checklist is for the listing agent to communicate to the buyer and seller(s) as a closing gift.

1. Thank you for choosing [Agency Name].
2. Thank you for choosing [Company Name].
3. Thank you for choosing [Company Name].
4. Thank you for choosing [Company Name].
5. Thank you for choosing [Company Name].
6. Thank you for choosing [Company Name].
7. Thank you for choosing [Company Name].
8. Thank you for choosing [Company Name].
9. Thank you for choosing [Company Name].
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98. Thank you for choosing [Company Name].
99. Thank you for choosing [Company Name].
100. Thank you for choosing [Company Name].
$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?
10. Administer a value test.
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 and applications.
  - Ignore the applicant’s name, address or personal information to limit subconscious biases.

- Consistent job flow and applicable experience:
  - Check work experience for applicable work person is applying, length of time in an industry received, reason for leaving
  - Is there a consistent job flow? You don’t want someone who has a job change over.
  - Note gaps in employment but do not have negative reasons.

- Customer service background:
  - Look at skills and experience.

- Real estate background:
  - Someone who knows someone who has knowledge of the business.
  - Educational background:
    - This group has a student motivation for self-advancement, although considered.

- Specific job skills and training:
  - Note special computer programs/software office considers the applicant easy to cross over 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 lead 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 will you handle a customer who was upset about something the agent was unable to deliver? 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 annoyed you?
13. Tell me about the worst supervisor you ever worked for.
14. Tell me how you handled working in that situation.
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.
<table>
<thead>
<tr>
<th></th>
<th>System Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Communication system</td>
</tr>
<tr>
<td>2</td>
<td>Prelist system</td>
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<tr>
<td>3</td>
<td>Listing system</td>
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<td>4</td>
<td>Closing system</td>
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<td>5</td>
<td>Customer service system</td>
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<td>6</td>
<td>Expired system</td>
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<td>FSBO system</td>
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<td>8</td>
<td>Database system</td>
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<td>9</td>
<td>Hiring system</td>
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<td>10</td>
<td>Lead generation system</td>
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<td>11</td>
<td>Tracking numbers system</td>
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<td>12</td>
<td>Buyer system</td>
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<td>13</td>
<td>Affiliate system</td>
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<td>14</td>
<td>Short Sale system</td>
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<td>15</td>
<td>Marketing system</td>
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<td>16</td>
<td>REO system</td>
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<td>17</td>
<td>Budget system</td>
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<tr>
<td>18</td>
<td>Tracking expenses system</td>
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<td>19</td>
<td>Internet/website system</td>
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<td>Price reduction system</td>
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<td>21</td>
<td>Goal setting system</td>
</tr>
<tr>
<td>22</td>
<td>Market statistics system</td>
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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
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