

Operations Policy & Procedures Manual

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Please use this template to create your own OPPs Manual for your team

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Section 1 Team's Mission Statement

Suggested Team Mission Statements & Mottos

Out Hustle, Out Work, Out Think and Out Play

Make Good Habits and They Will Make You

No Elevator to Success

Together Stronger

Opportunity may knock, but you must open the door.

It is not the hours you put in, it is what you put in the hours.

Section 2 Important Contact Information

Here's where you put your team's information including name, email, phone numbers and mailing address.

Other information this section should contain information and phone numbers for:

Emergency Contacts

Vendors

Catering Companies

Landlord

Photocopier Repair

Alarm/Security Company

Couriers

Section 3 Team/Company Organizational Chart

Place your team's Org Chart here

Section 4 Job Descriptions (Roles and Responsibilities)

Administrative Job Descriptions

Transaction Coordinator Duties

A transaction coordinator, or TC, is someone who assists a real estate agent by performing the administrative duties required during each stage of a transaction from contract to closing. Duties include:

- Opening escrow
- Coordinating inspections, repair negotiations, and completion of repairs
- Communicating updates to clients, agents, lenders, and other people involved in the transaction
- Monitoring the contingency period
- Ensuring that all documentation is submitted
- Coordinating the closing process
- Scheduling client follow-up calls (after close) to check in and ask for referrals

General Administrative Duties

General administrative assistants are responsible for managing projects, opening and distributing mail, organizing files, and conducting general research. They may also be in charge of other basic administrative duties, such as ordering office supplies and communicating with vendors. Other tasks include:

- Drafting documents and correspondence
- Preparing reports
- Proofreading

- Scheduling
- Providing telephone support
- Transcribing

This person is also an energetic professional who doesn't mind wearing multiple hats. Experienced in handling a wide range of administrative and executive support related tasks and able to work independently with little or no supervision. Well organized, flexible and enjoy the administrative challenges of supporting an office of diverse people.

Real Estate Listing Coordinator (Marketing Manager)

A listing coordinator is responsible for seller transactions from the initial contact to the execution of the purchase agreement. They are responsible for preparing listing information, obtaining necessary signatures for listing agreements, creating and managing MLS listings and social media, and coordinating showings and open houses for prospective buyers.

Real Estate Listing Coordinator Responsibilities

- Oversee all aspects of seller transactions from initial contact to execute purchase agreement, allowing real estate agents to sell more homes
- Prepare all listing information including property photos, a pre-listing presentation, comparative market analysis with online property profiles, and MLS research
- Obtain all necessary signatures on listing agreement, sellers' disclosures, and other necessary documentation and send to office broker for file compliance
- Create and manage MLS listings and social media so homes sell quickly and customers are satisfied
- Acquire vendor estimates and coordinate cleanings and repairs/upgrades on homes getting ready to be listed to sell

- Coordinate all showings for buyers, and public open houses to get feedback regarding showings to facilitate more sales
- Input sales activity into client database and track business reports to communicate progress toward company goals

Section 5 Policies

Admin Assistant Rules

- No accepting or requesting friend requests from Agents on social media.
- If you don't know, please ask.
- Do not leave the office unattended at any time.
- Friends and family should not visit during work hours.
- If you need to leave the office for any reason, let us know first.
- Dress for success daily. This means business casual for men encompasses dress slacks or chinos, button-down shirt, dressy polo shirt, jacket optional, dark socks, and dress shoes. For women, business casual means wearing a skirt or dress slacks, blouse, sweater, or twin set.
- Do not remove any hard copy files from the office.
- Do not delete any files or documents from Dropbox or Google drive.
- Do not modify a template on Trello Board without prior approval from a Team Leader.
- Do not move anything in Dropbox/Google Docs.
- Do not Archive boards in Trello, unless directed to.
- Do not make a copy of anything in Dropbox and save it to your own folder. Learn where the originals are so we do not end up with duplicates.
- Do not use our time for personal use (this includes working on your private business, making personal calls, or using Facebook).
- Do not discuss anyone's paycheck in front of others ever as that is confidential information.
- Do not discuss how much you make with anyone or ask anyone how much they make.
- Do not stay late without consulting a Team Leader or supervisor first.
- Do make sure you let us know if you didn't finish your tasks.
- If you finish a task quickly, please ask what else can you help with or take initiative.
- Do not participate in office gossip.

- Always be loyal to the company. Agents and other staff will come and go frequently but the Team Leader is the one who pays you.
- Do not disclose confidential information.
- Confidential information is defined by:

-Checks

-Commission statements

- Applications

-Contracts

- Do your work first! Special projects come after your work is done.
- Let the transaction coordinator (or selling/listing agent for that property) know when an EMD (escrow) check comes in right away.
- When receiving a package or delivery, ask the permission of the person addressed to first, before opening. Do not just put in their office or mailbox. Be helpful and proactive.
- Be careful of what you leave laying around on the desk or printer. It could have confidential information.
- Do not leave the reception area messy.
- Be the gatekeeper. Do not allow random people in the office without knowing who they are and why they are there. Make sure someone is taking care of them.
- Do not spend time talking with salespeople who come in randomly to sell things. Take their information and send them on their way.
- If anyone calls for an agent who is no longer here, do not say they no longer work here. Instead, ask how you can help them. They may be a client and we

can pass their information to another agent here. If they say they need to speak with that person only, then you can tell them they are no longer work here.

- Pay attention to details. That includes typing, emailing, texting, and communicating with other people.
- You are not allowed to show or even discuss properties unless you are licensed.

Section 6 Procedures & Checklists

Checklists & Forms Needed

PRE-LISTING CHECKLIST

LISTING CHECKLIST

SELLER LEAD FORM

MARKETING CHECKLIST FOR SELLERS

TRANSACTION COORDINATOR CHECKLIST

NEW BUYER TIP SHEET

REO/SHORT SALE FORM FOR BUYERS/SELLERS

OFFICE SUPPLY CHECKLIST

TRAINING

Section 7 Office Hours

Our office is open from 9am to 6pm, Monday through Friday and 10am to 4pm on Saturday. We are closed on Sunday.

Floor duty calendar is available on our office Google Calendar.

Section 8 Dress Code

Sample Dress Code:

Company policy states that the dress code for agents is business casual. Pressed slacks and collared shirts for men. Dresses, skirts, and blouses for female agents. No tennis shoes or flip flops allowed (unless otherwise noted for special events).

Section 9 Time Off Requests: Vacation, Personal, Sick Time

Put your Time Off Requests Forms for Vacation, Personal and Sick Time Here

Section 10 Safety Rules and Emergency Procedures

What are your safety rules and emergency procedures for your office and staff? Include them in this section.