



Training the World Class Admin

This is your dedicated schedule and checklist to train your administrative assistant from Average Admin to World Class Admin:

Week 1

Monday

How to answer the phone: Show the Admin the proper way of answering the phone system including how to greet callers, how to forward the phone, and what the procedures are for answering calls for agents (ie: take messages, forward calls to them, how to handle incoming leads through the phone).

Entering leads into the database: Show Admin how to correctly enter lead into the database. How to categorize the leads. How to distribute leads to agents.

Creating searches for the leads in the database/website: Setting up drip campaigns for buyers. How to search for properties in the MLS and assign them to buyers.

How to print 10 names on the SOI (Sphere of Influence) list to give to your Team Leader/Agent to call every day: How to identify and print 10 names from the database that are SOI for your Team Leader or Agent(s) to call every day.

Intro to shared calendar for planning purposes: How to access the team calendar for planning tasks and activities for the entire team.

Prepare for your Team Leader a 1 A+ lunch a week: This lunch is for your team's best clients (the ones that refer business to the team frequently) and needs to be set up a few times a year. Ask your Team Leader about setting up a monthly lunch for top producers as well.

Tuesday

How to customize and print flyers for all listings: Show Admin how to prepare flyers for the team's listings.

How to create a HOTLIST of all listings and print 5 out every week for the agents to give out to clients when they are out and about daily.

Posting ads online: Your admin can be assigned "moderator" or "admin" status on all your social media accounts, especially on your FB page so they can post and boost.

Also, go over all sources of online ads including Craigslist and show them examples of previous ads. How to create (unless your marketing department does the actual ads) the ads, how to post the ads, and how to set up billing for pay-per-click ads.

How to boost ads - specifically:

How to boost ads to farming neighborhoods (required for each listing).

How to boost demographically (required for each listing).

How to boost Team Leader's friend's friends (required for each listing).

Wednesday

How to prepare for working with a buyer, sending them houses by their criteria.

Making buyer's print out packets: What goes in a buyer packet? (See our templates for buyer packets at the end of the book).

Printing out the MLS sheets: How to log on to MLS and print out the buyer sheets.

Routing the Team Leader or Agent's schedule when showing property: Route the showings in drivable order.

Scheduling the appointment: Schedule an appointment to meet the buyer(s).

Updating the client on where to meet and at what time for the buyer consultation.

Adding the buyer appointment to the shared calendar.

Thursday

Planning Events (Open house, Client Appreciation events): Go through the checklist of planning events for the team including but not limited to Open Houses, Client Appreciation Events, etc.

Creating and mailing the event invites: Show which program is used to create the invites (or where to order invites) and how to mail the events (postage).

Creating an event online and inviting SOI: How to create an event online and invite the entire SOI team.

How to order or pick up food for the event: When and where to pick up food (or where to order for delivery if using a caterer).

Where to get balloons and other decorations for the event.

Print out flyers for the event.

Friday

How to pull comps to prepare for the listing presentation.

Show how to use MLS to pull comps for listing (See our chapter on doing a CMA). Prepping Listing Packets: Go over what goes in a Listing Package (Also check out our Chapter on Listing Admin).

How to get a sign and lockbox installed: Show where all the sign and lockbox inventory.

Scheduling photo shoots for listings: Who to contact for photography and what is the process.

How to prepare the Weekly Sellers Report (to update the seller).

Follow up on yesterday's showings: Contact any agents that have shown property in the last 24 hours. Add response to Weekly Seller Report.

Call sellers on yesterday's showings: Call seller's to give feedback for the prior day's showings and record response for Weekly Seller Report.

How to design and print flyers for Opens, listings etc.

Week 2

Monday

Training on the escrow log.

Training on how to TC (transaction coordinator) a file.

Tuesday

Training on how to check agent paperwork.

Training on how to compute agent commission checks.

Wednesday

Training on how to make sure the office is well stocked with supplies and kept presentable.

Training on marketing/social media.

Thursday

Training on onboarding new agents.

Training on onboarding new staff.

Friday

Training on how to prepare for weekly team meetings each week.

Expectations set on staff daily huddles.

Congratulations! You have completed your 2 weeks training to become a World Class Administrative Assistant.

Continue below for a comprehensive 12 week training program:

12 Week Training Checklist

☐ *Week 1*

☐ Complete Week 1 Training Checklist (see above)

☐ *Week 2*

☐ Complete Week 2 Training Checklist (see above)

☐ *Week 3*

☐ Meet Accounting Dept

☐ Go Over Bookkeeping Practices

☐ Review Lead Management & Tracking Processes

☐ Review Managing Database/CRM Checklist

☐ *Week 4*

☐ Meet with Preferred Vendors

☐ Tour Market Area

☐ *Week 5*

☐ Review Transaction Coordinator Process

☐ *Week 6*

- ☐ Shadow Listing Agent
- ☐ Shadow Buyer Agent
- ☐ Attend a Role Play/Script Practice

☐ *Week 7*

- ☐ Review Pre-List Package Checklists
- ☐ Review Listing Package Checklists

☐ *Week 8*

- ☐ Review Buyer Presentation Checklists
- ☐ Review Offer Process Checklists

☐ *Week 9*

- ☐ Review Closing Procedures

☐ *Week 10*

- ☐ Review Yearly Marketing Plan

☐ *Week 11*

- ☐ Review Training Schedule for Last 90 Days
- ☐ Meet with TL or Manager to Sign Off on Training Checklist

☐ *Week 12*

- ☐ Set Personal Goals for Next Quarter
- ☐ Update Calendar for Next Quarter