General Administrative Training Agenda

Training Agenda

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# 1a. Office Orientation (Day 1 am)

*Have a notebook ready for note-taking!*

## General Office Orientation

* + Keys for Office
  + Key box for client keys
  + Thermostat
  + Coffee Maker
  + Recycling and Garbage
  + Phones – answering, voicemail
  + Mail delivery/couriers
  + Staples Orders
  + Whiteboards
  + Banked Time Report & Expense Reports
    - Vehicle Mileage

# 1b. Office Orientation (Day 1 pm)

## Files & Forms

* Hard Files
* Archives
* Dropbox (see Computers & Technology)
* Locating Forms in Dropbox

## Human Resources

* About the Brokerage, broker and the office
* TEAM Beliefs and Values
* Staff roles, office etiquette (using notebooks, yellow notepads, etc)
* About the Team Leader (Listing Agent)
* About the Other Team Members (Buyer Representative)
* Other Staff and Roles
* Communication and Task Organization (email confirmations and bcc)
* HR Items – pay periods, payment methods, mileage, etc.

# 2a. Computers & Technology (Day 2 am)

## Dropbox

* Locating Information
* Naming files (when to use YY-MM-DD\_filename.ext)
* Naming folders

## TEAM Manual

* Locating Information
* Categories
* Links to other articles

## Matrix – General

* MLS.ca, realtor.ca
* Matrix
* Search
* Software
* Tax Assessments & Property Database

# 2b. Computers & Technology (Day 2 pm)

## Computers – General

* + Outlook
    - Email, folders, inbox “to do”
    - Calendars, sharing, setting appointments, reminders
  + Printers/Scanners and related settings
* Printing or saving to PDF from MS Word or other programs
* DocuSign
* Snagit/Snipping Tool (for screen shots)
* SPIN2 for Title Searches, Registrations, Caveats, Easements, etc…
* LINC Number
* Computer software updates (including automatic updates)
* Music on Computers in office

## Adobe Acrobat

* Manipulating Forms
* Flatten PDF for signing

# 3. Listing Administration (Day 3)

## Running/Deliveries

* Leaving Card/Note
* Lockbox Locations – when to use “cable”
* Delivering pre-listing packages (PLP)
* New Listing Items
  + Welcome Sign, Feature Sheets, Pens, Notepads, Business Cards/Holder, SOLD stickers, etc…
* Directional and Just Listed Signs
* Marketing bag
* Sending new listings to Conveyancing

## New Listings

* Listing Process
* Pre-Listing Package (PLP)
* Listing Documents
* Loading a Listing on Matrix
  + Where to find information (schools, floor sizes, etc.)
  + Private Comments – standard inclusions

## Vendors

* Sign Company
* Photographer
* Measurement Company
* Home Staging
* ShowingTime
* Condo Docs

# 4a. Buyer Administration (Day 4 am)

## ArRanging viewings for Buyers

* Scheduling with Realtors
* ShowingTime
* Texting for confirmations
* Map view and preparing a route
* Sending addresses to Buyer’s Agent Calendar

# 4b. Closing Administration (Day 4 pm)

## Matrix – part 2 (CMA)

* Detached, Attached, Apartment
* Saving the CMA
* Saving the old agent view

## Conveyancing and Closing Procedures

* Checklists
* Communication with the Brokerage (Phone/ Email)
* Sending new buyer purchases to Conveyancing
* Conveyancing Sheet
* Delivery of docs to clients (and lawyers)
* Quick possessions (under 20 days) – faster expediting of docs
* New homes
* Referrals
* Hard file and Dropbox folder setup
* Agency and Fintrac
* Purchase Contract (Residential / Condos)
* Home Inspection Schedule (if required)
* Transaction Brokerage (if required)
* Title (use to get legal address, names, and registrations)
* Full Agent View

# 5. Business Development (Day 5)

## Agent Upgrade

* What is the Agent Upgrade? Why do we believe in it?
* Tracking numbers

## Condos and Registered Plans ☺

## Market Reports

* Set up new market report
* Add contact

## Open Houses

* Scheduling Open Houses
* Documents to prepare for Realtor
* Tracking Form