General Administrative Training Agenda

Training Agenda

[1a. Office Orientation (Day 1 am) 2](#_Toc64542469)

[General Office Orientation 2](#_Toc64542470)

[1b. Office Orientation (Day 1 pm) 2](#_Toc64542471)

[Files & Forms 2](#_Toc64542472)

[Human Resources 2](#_Toc64542473)

[2a. Computers & Technology (Day 2 am) 3](#_Toc64542474)

[Dropbox 3](#_Toc64542475)

[TEAM Manual 3](#_Toc64542476)

[Matrix – General 3](#_Toc64542477)

[2b. Computers & Technology (Day 2 pm) 3](#_Toc64542478)

[Computers – General 3](#_Toc64542479)

[Adobe Acrobat 4](#_Toc64542480)

[3. Listing Administration (Day 3) 4](#_Toc64542481)

[Running/Deliveries 4](#_Toc64542482)

[New Listings 4](#_Toc64542483)

[Vendors 4](#_Toc64542484)

[4a. Buyer Administration (Day 4 am) 5](#_Toc64542485)

[ArRanging viewings for Buyers 5](#_Toc64542486)

[4b. Closing Administration (Day 4 pm) 5](#_Toc64542487)

[Matrix – part 2 (CMA) 5](#_Toc64542488)

[Conveyancing and Closing Procedures 5](#_Toc64542489)

[5. Business Development (Day 5) 6](#_Toc64542490)

[Agent Upgrade 6](#_Toc64542491)

[Condos and Registered Plans ☺ 6](#_Toc64542492)

[Market Reports 6](#_Toc64542493)

[Open Houses 6](#_Toc64542494)

# 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