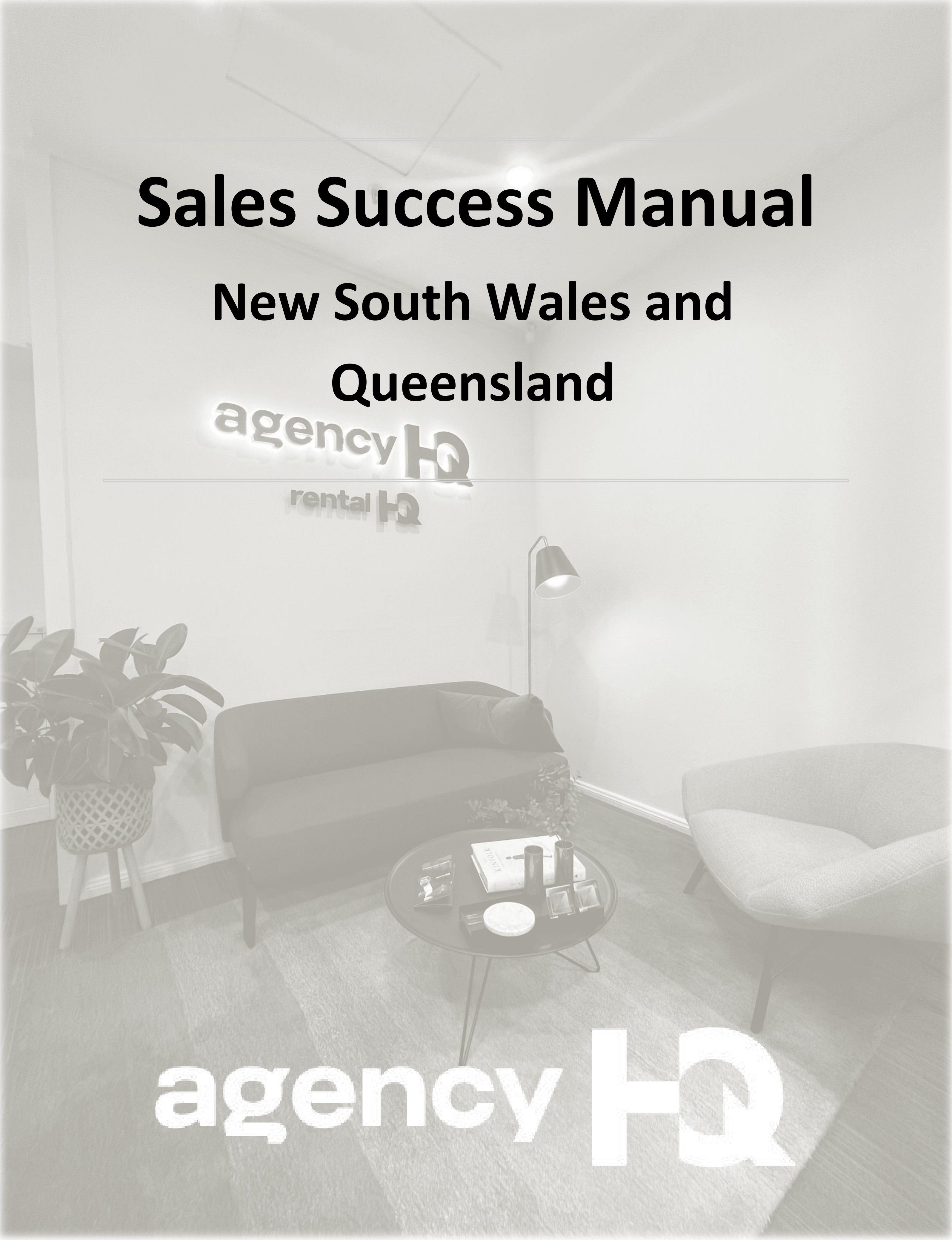
Sales Success Manual

New South Wales and Queensland



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About the Company

Summary

Agency HQ is a new concept in real estate agency model that approaches real estate differently to traditional agencies. HQ aims to provide a systemised sales agent support offering to the marketplace and an opportunity for sales agents to work under a flexible operating environment; which is a contrast to the street agency, where all operations happen behind closed doors.

HQ's initial market presence will be in NSW and Qld; with later presence planned in Vic; then other states.

Servicing our sales agents in a set process is key to success. Back office processes have to be well defined, tightly controlled and efficiently rolled out. This manual sets out the sales support process for the business and in reviewing the manual, as an HQ employee, your responsibility is to understand the processes intricately in the context of the following objectives:

1. Agency HQ is a **highly compliant** business and we must not breach legislation under any circumstances. This standard extends to not taking shortcuts and our work must extend to industry leading/best practice;
2. Processes and rollout must be **consistent** across ALL Agency HQ offices. This is compulsory; therefore the workflow, standard letters, checklists etc must be consistently followed by all teams. All collateral, whether a letter, client email; checklist, workflow, process notes must be approved by the executive team before being used by anyone;
3. **Customer service** has to be 100%. To get this right, every employee needs to understand all levels of customers - the sales agent, the vendor and the buyer. Remember, the Agency HQ model is also a central service model; therefore any Agency HQ network office, its Principal and any staff working for that office is also a customer. At all times, the sales support team, the Client Success Champions understand that our services must be energetically rolled out; with

enthusiasm and genuine interest and a property requirement is not treated as just another transaction; and

4. We are a business ultimately and **demonstrating efficiency** is vital to the company's success and your success. Therefore your understanding of these processes is vital.

Entities

Agency HQ is part of a national group of companies, with a key associate arm Rental HQ. The relevant entities for the purposes of operations support are as follows:

Head Offices

- **Agency HQ (Australia) Pty. Ltd. T/A Agency HQ Australia**

  THIS IS THE MAIN AGENCY HQ FRANCHISE OPERATOR AND ITS ROLE IS TO ROLL OUT AND OPERATE THE ENTIRE AGENCY HQ BUSINESS MODEL NATIONALLY. A KEY MATTER TO NOTE IS THAT THIS IS THE HEAD OFFICE ENTITY AND DOES NOT CONDUCT REAL ESTATE AGENCY SALES AND IT ONLY ADMINISTERS THE OVERALL BUSINESS. THE SALES TRADING ENTITIES ARE SEPARATE.

  Key Details
  ACN: 632 187 609
  ABN: 48 632 187 609
  Registered Address: 28a/10 Eagle Street, Amp Place, Brisbane City, Qld 4000
  Office Address in NSW: Mezzanine Level, 50 Margaret Street, Sydney NSW 2000
  Office Address in Qld: FCRE Pty Ltd, Attention Sanjiv/Denise
  PO Box 88, Hamilton Central. Qld 4007
  T: 1300 41 81 94

- **Rental HQ (Australia) Pty Ltd T/A Rental HQ Australia**

  THIS IS THE MAIN RENTAL HQ FRANCHISE OPERATOR AND ITS ROLE IS TO ROLL OUT AND OPERATE THE ENTIRE RENTAL HQ BUSINESS MODEL NATIONALLY. A KEY MATTER TO NOTE IS THAT THIS IS THE HEAD OFFICE ENTITY AND IT DOES NOT CONDUCT REAL ESTATE PROPERTY MANAGEMENT SERVICES AND ONLY ADMINISTERS THE OVERALL BUSINESS. THE RENTAL TRADING ENTITIES ARE SEPARATE.

  Key Details
  ACN: 631 128 820

ABN: 37 631 128 820
Registered Address: 28a/10 Eagle Street, Amp Place, Brisbane City, Qld 4000
Office Address in NSW: Mezzanine Level, 50 Margaret Street, Sydney NSW 2000
Office Address in Qld: FCRE Pty Ltd, Attention Sanjiv/Denise
PO Box 88, Hamilton Central. Qld 4007

HQ Entities

- **SALES**

These entities will conduct the business of real estate sales under a corporation's license issued by the OFT.

Sales agents will either be employed by the respective entity; or sales agents will be contractors and enter into a co-agency arrangement with the respective entity.

Agency HQ (NSW) Pty Ltd

ACN: 635 650 225
ABN: 30 635 650 225
Licence No.: 10090926
Licence Expiry Date: 13 October 2020

- **Pyrmont**
  Office Address: Mezzanine Level, 50 Margaret Street, Sydney NSW 2000

Agency HQ (Qld) Pty Ltd

ACN: 635 650 501
ABN: 95 635 650 501
Licence No.: 4339266
Licence Expiry Date: 5 December 2022
Registered Office Address: Unit A Level 28, 10 Eagle Street, Brisbane QLD 4000

- **Calamvale**
  Sellsius Pty Ltd ATF The ACM Unit Trust
  ACN 141 217 969
  Principal: Andrea Manson
  Office Address: Suite 4, Level 1, 188 Algester Road, Calamvale QLD 4116
  Contact No.: 07 3272 8855

- **RENTALS**

These entities will conduct the business of real estate property management under a corporations license issued by the OFT.

The rentals will either be owned by the entity itself; or we will manage rentals owned by other parties on their behalf, who may find it is more efficient to have HQ operate the rentals.

Rental HQ NSW Pty Ltd
ACN: 636 967 489
ABN: 42 636 967 489
Licence No.: 10091608
Licence Expiry Date: 3 November 2020
Office Address: 100 Harris Street, Pyrmont, NSW 2009

Rental HQ (Qld) Pty Ltd
ACN: 636 975 267
ABN: 70 636 975 267
Licence No.: 4339275
Licence Expiry Date: 10 December 2022
Office Address: Level 2, 52 McDougall Street, Milton QLD 4064

- **MARKETING ENTITY**

Rental HQ and Agency HQ will have all the marketing (whether vendor paid, agent paid or company paid) streamlined via the marketing entity. It is vital that this is coordinated via this entity.

HQ Marketing Pty Ltd
ACN: 636 965 172
ABN:
Office Address: FCRE Pty Ltd, Attention Sanjiv/Denise
PO Box 88, Hamilton Central. Qld 4007

The Operations team has a mandatory responsibility as follows:

1. To ensure all marketing is prepaid into the marketing business before anything is ordered:
   - i. By vendor
     1. EFT
     2. Cheque
     3. Credit card
   - ii. By agent
   - iii. By third party funder (see further)

2. Company expenses can only be approved by a director

- **EMPLOYING ENTITY**

HQ Australia Administration Pty Ltd
ACN: 636 253 177
ABN: 90 636 253 177
Office Address:

Branding

Conformity to the HQ branding is a key matter for all staff and network offices. Therefore understanding and compliance with Brand Identity Guide is essential for the role.

It also needs to be appreciated that our trading name will only be **Agency HQ** and **Rental HQ**. We have no geographic based branding at all. We have territories for business development purposes, but the trading name must only be the above. **Style Guide folder in GDrive**

Font Style/s:
HK Grotesk & Criteria CF (must be installed in each computer) - you may obtain this from GDrive Folder
Font Color/s:
Gold - HEX B5A070 (RGB: 181,160,112)

Company Letterhead
Only authorised letterheads are to be used. There is no modification permitted to any part of the letterhead without consent from the executive team.

> Letterhead will be available on the G Drive. Key is to ensure no letter is sent unless it is on the standard templates. The employee's responsibility is to ensure the formatting is exactly as per the Style Guide.

Sample Email Signature:
All staff must use the exact format set our below. Position titles must never be amended without approval from HR.

--
Kind Regards,

Mark Morrison
CEO | Agency HQ
M: 0437 774 197
E: mark.morrison@agencyhq.net.au | W: www.agencyhq.net.au
A: 100 Harris Street, Pyrmont NSW 2009

agency HQ

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The Team

Mark Morrison

CEO of Agency HQ

Overall senior executive in charge of Agency HQ (Qld and NSW) and in charge of sales business and OFT compliance

M: 0437 774 197
E: mark.morrison@agencyhq.net.au
W: www.agencyhq.net.au

Yasemin Kemal

Head of Property Management - Rental HQ

In charge of rental office network; HQ processes, compliances, services roll out, CS team

Leah or Anne

Client Success Champion

Responsible for rolling out support work sales agent services in NSW and Qld for:

- Listing:
    a. Agency agreements:
        i. Preparation
        ii. Compliance
        iii. Storage
        iv. Entering into system
- Marketing:
    a. Budget preparation
    b. Receipt of vendor approval
    c. Evidence of funds received - vendor/agent
    d. Orders for marketing
    e. Approval of VPA invoices
    f. Liaising with finance
    g. Liaising with agents on reconciliation of marketing
- Contract management:
    a. Receiving and reviewing contracts
    b. Distribution

c. Contract conditions
d. Pre-settlement
e. Settlement
f. Commission apportionment confirmation

- Champion team coordination (Manila)

M: Email or Google chat contact only
E: clientsuccess.qld@agencyhq.net.au / clientsuccess.nsw@agencyhq.net.au
W: www.agencyhq.net.au

Our Customers - Sales Agents

All Operations staff need to be aware that they will be servicing:

- Sales agents who are employed by Agency HQ (company owned)
- Sales agents who are employed by an Agency HQ franchised offices and the Principals who will expect an efficient service
- Sales agents who are independent contractors working in conjunction with Agency HQ

Important to understand that some agents will be accessible to other team members; others may be operating from home and others may be at other office locations.

Operations Framework

AGENCY HQ & RENTAL HQ

- OPERATIONS FRAMEWORK

LISTINGS:

- Client Success Champions (CSC):
  - PREPARE FORM 6/AGENCY AGREEMENT
  - PLACES THE POTENTIAL DEAL ON EAGLE SOFTWARE
  - OBTAINS MARKETING PROPOSAL FROM SALES AGENT
  - PROVIDES AGREEMENT + MARKETING SET TO SALES AGENT
  - RECEIVES SIGNED COPY FROM SALES AGENT
  - CONVERTS THE DEAL ON EAGLE SOFTWARE
  - PERFORMS COMPLIANCE CHECKS
  - TRANSITIONS THE DEAL ON TRELLO
  - ENTERS LISTING ON SYSTEM
  - ENTERS MARKETING ON SYSTEM
  - FILES AGREEMENT ONTO DROPBOX
  - CHECKS ON PAYMENT OF MARKETING
  - (ACCOUNTING WILL PROVIDE THIS NOTIFICATION TO OPERATIONS DAILY)
  - (CREDIT CARDS TO BE CHARGED BY OPERATIONS TEAM MEMBER)
  - INITIATES THE MARKETING VIA CAMPAIGN TRACK
  - REVIEWS MARKETING:
    - PHOTOGRAPHY
    - SIGNBOARD
    - SCRIPT

- BROCHURES
    - MEDIA
  - OBTAINS AGENT APPROVAL
  - OBTAINS VENDOR APPROVAL
  - INITIATES MARKETING
  - RECEIVE MARKETING INVOICES:
    - REVIEWS
    - AUTHORISES AND SENDS TO ACCOUNTING TEAM VIA DEXT
    - MARKS DIRECTIONS TO ACCOUNTING TEAM - ACCOUNTING TEAM WILL GUIDE AT INDUCTION
    - QUERIES - SENT BACK TO SUPPLIER
- ACCOUNTING TEAM :
  - Receives approved invoices from CSC via DEXT
  - Processes payment to supplier weekly
  - Refers any queries back to CSC

CONTRACTS:

- CSC's will:
  - receive contracts
  - Review contracts
  - Enter them into system
  - (follow Qld and NSW processes here 100%)
  - Diarise conditions
  - Look out for IBTDA instructions and immediately obtain beneficiary names and TFN's (NSW)
  - Follow up conditions with parties
  - Notify agents on conditions
  - If fallen over:
    - Obtain letters from solicitors
    - Send ACCOUNTING TEAM Trust Payment Authority for refund of deposit
  - Mark deal as unconditional on system when advised
  - Prepare for pre-settlement (as per process)
  - Receive settlement advice
  - (follow Qld and NSW processes here 100%)
  - Provide Settlement team the Settlement Authority
  - Accounting team will receipt trust deposits and issue trust receipts and advise CSC of receipt of funds
  - Process IBTDA as long as details are provided
  - Manage sales trust accounting fully

- Process any Trust Payment Authorities for fall over contracts (will require Trust Payment Authority and information – Accounting team will induct HQ staff)
- Receive and check the Settlement Authority with supporting details
- Process the settlement as instructed - for trust accounting records and internet banking
- Pay commission (GCI) to office
- Pay contractors and GCI for bonafide contractors
- Pay balance of deposit to vendor based on bank details obtained by Operations team
- Advise the business by email that settlement is complete
- Hand the settlement to payroll team for pay-runs
- Pay commissions fortnightly basis - M-F/M-F payable Mondays
- Mark the deal as Settled/Closed on system

Welcome to Agency HQ

MISSION

To build a real estate network with a great culture where real estate professionals can grow a profitable real estate business and create wealth.

VISION

Smarter systems and marketing that allow real estate professionals to focus on what they do best, listing and selling real estate.

Values

1. **Integrity**: Being honest with strong moral principles.

2. **Balance**: We believe that good quality work starts at home. Our team is able to work hard and deliver great results because we stress the importance of a good work/life balance.

3. **Achievement**: Accomplishing something in your life or work that is noteworthy could be something that adds a unique sense of value to your life.

4. **Wealth**. Not in the monetary sense but in the "having everything that you need sense."

5. **Happiness**: Happiness has been shown to predict positive outcomes in many different areas of life including mental well-being, physical health, and overall longevity.

Building and Maintaining Relationships

- Show respect and value for the skills, experiences, creativity, and contributions of group members.
- Adhere to leadership and decision making guidelines.
- Embrace diversity.
- Listen to and acknowledge the feelings, concerns, opinions, and ideas of others.
- Share credit for good ideas with group members.
- Assist others in solving problems and achieving team goals.
- In a respectful manner, give and receive opinions and feedback from group members.
- Define problems and disagreements in a firm, but non-threatening manner.
- Support the efforts and final decisions the team even if not in total agreement.

Achieving Team Goals

- Know your role, your strengths, and how you can best contribute.
- Share information, ideas, and suggestions in a respectful manner.
- Help in identify and achieve goals.
- Help in identify and solve problems.
- Notify others of delays, changes, or problems in a timely manner.
- Do your job. Period.

The five worst business mistakes you can make are:

1. Lack of Clarity
   “First work out your goals. Imagine how your business would look if it were exactly the way you wanted it. How many in your team? What’s your turnover? What regions are you operating in?”

2. Fighting fires, rather than building firebreaks
   “One of the keys to success in business is your ability to establish effective systems to run your business. This is what I call ‘building firebreaks’ – your business plan, marketing strategy, talent recruitment and systems development.”

3. No Plan
   “Very few businesses get their plan right at the beginning. In fact, almost none. Therefore the ongoing evolution of your business plan and strategies is far more important than your initial plan. The key to a good plan is brevity – less than one page, in bullet point form and easily understood by your team.”

4. No Accountability
   “Lack of accountability is one of the main reasons people & businesses rarely rise to their potential. You must have honest conversations around expectations, responsibility and accountability. Be very clear about who’s responsible for achieving the results and what to do if there’s a problem. Establish key milestones leading up to the ultimate goal and check progress regularly.”

5. Poor Time Management
   “ You must work out what your most important tasks are & then make sure you have enough time to do them.”

Agency HQ Standards

Market Share (individual and office total)

Market share in a real estate office is simple to work out, both for the office as a whole as well as for the individual sales people who make up the office. It's a good place to begin because it will tell you how big the pie is, how many people are sitting down to eat and how big a slice of that pie you actually have.

Gathering the data
(National Property Data)

The Numbers

Total # of properties in your market Place?		______________
Total # of sales PA? (use 3 year average)	(A)	______________
Average sale price		______________
Average fee charged ($)	(B)	______________
Total fees available	(C) A x B	______________
Your # of sales last year	(D)	______________
Your GCI last year	(E)	______________
Your market share of sales	(F) D/A%	______________
Your market share of fees	(G) E/C	______________
# of Sales people in your BDA		______________
# of Sales people in your office		______________
Average fee per agent PA		______________

What are the two main ways to increase market share?

1. ______________________________
2. ______________________________

Agency HQ Protocol – Staff movements within the network

From time to time within our network of offices, there will be circumstances where an existing Agency HQ team member may want to move from one office to another.

Our highest priority is to keep good people within our brand and to maintain harmony and excellent relations between franchisees.

Below is the company protocol to follow for this situation:

3. No active soliciting of staff from another office
4. If approached by a staff member, the principal should ask that person to speak in the first instance with their principal
5. The principal being approached if seriously contemplating appointing the person will then speak with the principal of that staff member asap. This may jeopardize the person's confidence but the relationship between principals is paramount.
6. Ultimately, we want the person to stay in the network.

Agency HQ Agent Checklist

90 Day Success Plan

AGENT NAME:		START DATE:	
AGENT SIGN:		SALES MANAGER SIGN:	
MONTH 1			
PRIOR TO START DAY	**TASKS**	**DESCRIPTION**	**CHECKLIST**
	Sign employment contract including Key Performance Indicators (KPI's)		
	Personal photos taken		
	Personal biography written		
	Order business cards		
	Provide copy of Real Estate License / Registration to Principal		
	Review all content of Agency HQ website and its functions		
DAY 1	**TASKS**	**DESCRIPTION**	**CHECKLIST**
	Set up your desk, phone message, email signature and Eagle software login		
	Record mobile messages		
	Schedule weekly 1 on 1 coaching session with the Sales Manager /	recurring diary appointment, weekly for 12 weeks, then review frequency	

	Principal		
	Assign property manager and introduction		
	Create your Sales Business and Prospecting Plan Sales Manager	Must include 10+ prospecting strategies.	
	Create your personal marketing plan		
	Create your ideal week	Must include 12 hours min of prospecting	
	Create your personal listing kit		
WEEK 2	**TASKS**	**DESCRIPTION**	**CHECKLIST**
	Weekly 1 on 1 session		
	Implement your prospecting plan and start measuring your results on Weekly Call Register		
	Enter everyone you know on database and send Prospecting Letter #1		
	Review Buyer		
	Review Listing Questions		
	Start calling old Open For Inspection (OFI) books, database and etc. to find hot buyers or possible sellers	- Sales Manager may be able to provide	
	Order A frame sign/s	- Auction and OFI	
	Order sign board flag/s	- Auction and OFI	
	Read your office procedure manual		
	Attend 3x Auctions and 3x OFI	- Agency HQ and other Agents to observe and learn	
	Contact expired and For Sale by Owner (FSBO) in your BDA		
	Start tracking every new listing in your BDA weekly	- Use REA and/or Domain	
	Go to 3 listing appointments with a Senior Agent to observe	- Sales Manager to Organise	
	Pre-plan your annual leave times	- Work hard then rest	
	Have 5 face to face buyer appointments	- Show them office stock	
	Add 10 people minimum to your database		
	Learn to use National Property Data		
	Research buyer origin with your BDA (via Eagle and ask senior agents)		

	Goal for week 1 – book 2 KTI's	- The idea is to meet people not specifically to list	
WEEK 2	**TASKS**	**DESCRIPTION**	**CHECKLIST**
	Weekly 1 on 1 session		
	Prospecting as per your plan		
	Call back those who received your intro letter from Week 1		
	Attend 3 auctions and 3 OFIs	- Agency HQ and others	
	Review OFI checklist		
	Go to 3 listing appointments with a Senior Agent to observe and learn		
	USP test Sales Manager	- You must know it by now 100%	
	Role play listing presentation with Sales Manager x 2		
	Contact FSBO and expired listings	- Track them	
	5 face to face buyer appointments		
	Add 10 people minimum to your database		
	Join or set up a business/networking group	- Local business owners, etc.	
	Research competing agents in your BDA	- Attend OFI's, research their sales and listings etc.	
	Eagle practice	- See your CSC or Eagle Support or watch tutorial videos	
	Track every new listing within your BDA		
	Create your listing case studies		
	Role play expectation meeting with your Sales Manager		
	Goal for week 2 – book 2 KTI's	- Some KTI's will eventually turn into listings	
WEEK 3	**TASKS**	**DESCRIPTION**	**CHECKLIST**
	Weekly 1 on 1 session		
	Prospecting as per your plan	Letters, follow up calls, networking and working with hot buyers should now be part of your weekly routine	
	Have 5 face to face buyer appointments		

	Attend 3 auctions and 3 OFIs		
	Track every new listing in your BDA		
	Add 10 people to your database		
	Practice your USP, listing presentation and expectation meeting		
	Review OFI and Auction checklist		
	Role play objections with Sales Manager and Senior Sales People	- They fire the objections, you answer them - Refer also objections category on MTV and Scripts Section of Fast Track Manual	
	Goal for week 3 – book 4 KTI's	- Some KTI's will eventually turn into listings	
WEEK 4	**TASKS**	**DESCRIPTION**	**CHECKLIST**
	Weekly 1 on 1 session		
	Prospecting as per your plan	Letters, follow up calls, networking and working with hot buyers should now be part of your weekly routine	
	Have 5 face to face buyer appointments		
	Attend 3 auctions and 3 OFI's		
	Track every new listing in your BDA		
	Add 10 people to your database		
	Practice your USP, listing presentation and expectation meeting		
	Role play objections with CEO (they fire the objections, you answer them)		
	Goal for week 4 – book 4 KTI's	- Some KTI's will eventually turn into listings	

MONTH 1 MILESTONE	**TASKS**	**CHEKLIST**
	Hyper local knowledge of your BDA	
	12 KTI's	
	Minimum of 40 new people into your database	
	Know the Agency HQ USP very well	
	Know the sequence and content of the listing presentation	
	Know the Expectation meeting	
	Working to a prospecting routine and confident with your dialogue	
	Good knowledge of both buyer and listing questions	

	10+ prospecting strategies employed in your business		
	12 hours prospecting per week minimum		
	Up to date with tracking every listing in your BDA		
	Confident with Eagle software & National Property Data		
	Part of an ongoing business networking group		
	Working with at least 10+ hot buyers at any time		
MONTH 2			
WEEK 1	**TASKS**	**DESCRIPTION**	**CHECKLIST**
	Weekly 1 on 1 session		
	Update your listings case studies template with recent office sales		
	Review your ideal week with Sales Manager	- Is it working well, does it need changing	
	Review prospecting plan and results of month 1 with Sales Manager	- Is it working and producing results?	
	Review business plan with sales manager	- On track/off track?	
	Role play weekly Vendor meeting with Sales Manager		
	5 buyer appointments		
	5 KTI's or listing appointments		
	Review 3 written vendor reports from senior agents (sales manager to supply) to see format and detail (comments, feedback, offers, etc.)		
	Take a star to breakfast	- Find an Agency HQ agent who is excelling in an area you find challenging and pick their brains	
	Goal every week going forward – 5 KTI's + 10 people in database		
WEEK 2	**TASKS**	**DESCRIPTION**	**CHECKLIST**
	Weekly 1 on 1 session		
	Continue with prospecting plan – consistency is key		
	5 buyer appointments		
	5 KTI's or listing appointments		
	Role play listing presentation x 1		

	Role play expectation meeting x 1		
	Role play weekly vendor meeting x 1		
	Attend 2 weekly vendor meetings with Senior Agent		
	Role play objections with Sales Manager	- They fire the objections, you answer them	
	Goal every week going forward – 5 KTI's + 10 people in database		
WEEK 3	**TASKS**	**DESCRIPTION**	**CHECKLIST**
	Weekly 1 on 1 session		
	Continue with prospecting plan		
	5 buyer appointments		
	5 KTI's or listing appointments		
	Role play listing presentation x 1		
	Role play expectation meeting x 1		
	Role play weekly vendor meeting x 1		
	Attend 2 reserve meetings with Senior Agent		
	Attend 2 weekly vendor meetings with Senior Agent		
	Goal every week going forward – 5 KTI's + 10 people in database		
WEEK 4	**TASKS**	**DESCRIPTION**	**CHECKLIST**
	Weekly 1 on 1 session		
	Continue with prospecting plan		
	5 buyer appointments		
	5 KTI's or listing appointments		
	Role play listing presentation x 1		
	Role play expectation meeting x 1		
	Role play weekly vendor meeting x 1		
	Attend 2 reserve meetings with Senior Agent		
	Attend 2 weekly vendor meetings with Senior Agent		
	Goal every week going forward – 5 KTI's + 10 people in database		

MONTH 2 MILESTONES	TASKS	CHEKLIST
	Sign off by Sales Manager as proficient at prospecting, listing presentation, expectation meeting and weekly vendor meeting	
	20 buyer appointments per month	
	20 KTI's/listing appointments per month	
	40 people min into database every month	
	2 listings (Your own or split with Sales Manager or another Agent)	
	Tracking every listing in your BDA	
	Good knowledge of your competitors' strengths and weaknesses	
	Looking closely at the ratios from your prospecting and seeing where you can improve	
	Proficient at handling objections	

MONTH 3

WEEK 1	TASKS	DESCRIPTION	CHECKLIST
	Weekly 1 on 1 session		
	Continue with prospecting plan		
	5 buyer appointments		
	5 KTI's or listing appointments		
	Role play reserve price meeting with Sales Manager		
	Goal every week going forward – 5 KTI's + 10 people in database		

WEEK 2	TASKS	DESCRIPTION	CHECKLIST
	Weekly 1 on 1 session		
	Continue with prospecting plan		
	5 buyer appointments		
	5 KTI's or listing appointments		
	Role play buyer meeting		
	Goal every week going forward – 5 KTI's + 10 people in database		

WEEK 3	TASKS	DESCRIPTION	CHECKLIST
	Weekly 1 on 1 session		
	Continue with prospecting plan		
	5 buyer appointments		

	5 KTI's or listing appointments		
	Role play areas of weakness		
	Goal every week going forward – 5 KTI's + 10 people in database		
WEEK 4	**TASKS**	**DESCRIPTION**	**CHECKLIST**
	Weekly 1 on 1 session		
	Continue with prospecting plan		
	5 buyer appointments		
	5 KTI's or listing appointments		
	Role play listing presentation, all meeting agendas and objections		
	Find a mentor / network for regular calls and meetings		
	Goal every week going forward – 5 KTI's + 10 people in database		
MONTH 3 MILESTONES	**TASKS**		**CHEKLIST**
	20 KTI's or listing appointments per month on-going		
	20 buyer appointments per month on-going		
	2 listings per month on-going		
	2 sales per month on-going		
	40 people min in database every month on-going		
	Look at moving 1 on 1 sessions to fortnightly		
	Focus on a minimum 10% market share in your BDA		

BDA Vital Statistics

When researching sales history, use an average of past sales over the previous 3 years.

	Target suburbs (in your BDA)	Total # Houses	Total # Units	Total # Sales/Year Houses	Available Com Houses	Total # Sales/Year Units	Available Com Units	Total BDA Com PA
1								
2								
3								
4								
Total					$		$	

	Top 10 streets (by volume of sales)	# Houses	# Units	# Sales PA Houses	Available Com	No. Sales/Year Units	Available Com
1							
2							
3							
4							
5							
6							
7							
8							
9							
10							
Total					$		$

How many properties listed in your BDA past 6 months?
How many properties sold in your BDA past 6 months?
What is the Listing : Sale ratio in your BDA?
Which schools are in the catchment area of your BDA?
Who are the typical buyers in your BDA?
What is the buyer origin in your BDA?
What is Agency HQ Auction clearance in your BDA?
What is Agency HQ DOM in your BDA?
What is industry DOM in your BDA?

Agency HQ Agent Checklist

Sales Agent Personal Audit

Date: ____
Name: ____
Office: ____

Personal Audit (rate yourself 0 > 10)

1. Life Balance	/10
2. Managing your personal finances	/10
3. Prospecting for new business (consistently)	/10
4. COI/Network Group (do you have one)	/10
2. Nurturing past clients (staying in touch via regular letters, calls, newsletters, emails etc)	/10
3. Pipeline follow up	/10
4. Rewarding / Recognising referrers	/10
5. Thoroughness in preparing for an MA	/10
6. Using Pre-List Kits	/10
7. Dealing with price at the listing	/10
8. Using price guides	/10
9. Your listing presentation (do you win min 80% of the business?)	/10
10. Understanding of local architecture?	/10
11. Do you believe VPA really works?	/10
12. Obtaining VPA (Dealing with VPA objections)	/10
13. Dealing with Fee objections	/10
14. Using case studies	/10
15. Having your sales manager and auctioneer make a ‘Welcome Call’ to every	/10

new vendor	
16. Expectation meeting (set to sell) on every listing?	/10
17. Vendor management (daily calls, weekly face to face, weekly written reports, price alignments)	/10
18. Buyer management (regular contact, buyer meetings prior to auction)	/10
19. Adding all buyers into the Eagle software	/10
20. Private appointments with qualified buyers (min 3x a week)	/10
21. Negotiation strategy – ability to extract best price	/10
22. OFI call backs	/10
23. Selling prior to auction	/10
24. Selling at auction	/10
25. Selling post auction	/10
26. Having critical and courageous conversations	/10
27. Getting offers/price indications from all buyers	/10
28. Running an effective reserve price meeting	/10
29. Auction floor work (Negotiation during auction)	/10
30. Using an ideal week	/10
31. Asking great questions – finding out more from clients	/10
32. Writing Thank You cards	/10

Knowing your Numbers

	Do you know how many	Don't know
Cold calls: MA		
Letters/DL's: MA		
Warm calls: MA		
Expired: MA		
MA: List ratio		
List: Sell ratio		
Your market share %		
# Houses in your BDA		
# Units in your BDA		
# New listings of houses and units in your BDA per month		
# Sales of houses & units in your BDA per month		
Average sales price of houses & units in your BDA		
Average commission in your BDA PA		
Your average com?		
Your auction clearance rate?		
Your DOM Auction		
Your DOM EPT		

What 3 things if done better would have the biggest impact on my business?

1. ____

2. ____

3. ____

What 3 things are holding me back?

1. ____

2. ____

3. ____

Relevant Legislations

Australian Government

1. Competition and Consumer Act 2010 (Cth) Schedule 2 or Australian Consumer Law s30
2. Australian Competition & Consumer Commission (ACCC) Guidelines
3. Privacy Act 1988
4. SPAM Act 2003
5. Corporations Act 2001 (Cth) s127 and s129

New South Wales Legislation

1. Property, Stock and Business Agents Act 2002
2. Property, Stock and Business Agents Regulation 2014
3. Guidelines issued by NSW Commissioner for Fair Trading (or if applicable, the Secretary of the Department of Finance, Services and Innovation)
4. Conveyancing Act 1919 S66W
5. NSW Government Fair Trading
6. REINSW

Queensland Legislation

1. Property Occupations Act 2014
2. Property Occupations Regulation 2014
3. Agents Financial Administration Act 2014
4. Agents Financial Administration Regulation 2014
5. Qld Government Fair Trading
6. REIQ

Compliance

Compliance Checklists

Location in Google Drive: Agency HQ > Training > Compliance Checklists

- New Listing (NSW) Checklist
- New Listing (Qld) Checklist

Systems/Tools

CRM:	Eagle Software https://www.eagleagent.com.au/users/sign_in
Property Data:	National Property Data https://npdata.com.au/login
Marketing Platform:	CampaignTrack live.campaigntrack.com Printforce (QLD) https://online.printforce.com.au/
Cloud Storage:	Google Drive and Dropbox

The Database Operations Manager will provide the access/log ins.

Step-by-step Instructions and Tutorials: Refer to Schedule A

Client Success Champion

Responsible for rolling out support work sales agent services in QLD & NSW for the following:

Prospecting

Done by agent

Appraisal

Comparative Market Analysis (CMA)

Listing

- Preparation of Form 6
- Compliance
- Storage
- Entering into System

Marketing

- Budget Preparation
- Receipt of Vendor Approval
- Evidence of funds received
- Orders for marketing
- Approval of VPA invoices
- Liaising with finance
- Liaising with agents on reconciliation of marketing

Contract

- Receiving & Reviewing contracts
- Distribution
- Contract Conditions
- Process from UNDER CONTRACT To CONDITIONAL To UNCONDITIONAL
- Commission Apportionment Confirmation

Settlement

- Documentation
- Update of Status
- Process Settlement docs
- Forward to Trust
- Reconciliation
- Notify Agent/Seller for any balance deposit or outstanding balance

Appraisal

1. Sales Agents will add the property to Eagle Software and enter the details of Sellers

Pre-listing - Eagle Software

1. CSC to send an email to all Sales Agents every start of day to remind them to send their Form 6/Agency Agreement requests together with the Marketing Quote.
2. Once Form 6/Agency Agreement/CMA and Marketing Set are done, send it to Sales Agent via clientsuccess.qld@agencyhq.net.au or send to Sales Administrator/Compliance Officer for checking.

Listing

1. Sales Agents will be sending the completed and signed Form 6/Agency Agreement & CMA to clientsuccess.qld@agencyhq.net.au
2. Sales Operations (Leah or Mych) will check the submitted signed Form 6/Agency Agreement and will notify CSC if it's okay to process. **Compliance Check**
3. CSC to send signed Agency Agreement to vendor (CC agent into any correspondence) via Eagle Software and attach:
   a. Thank you for Listing letter
   b. Service Guarantee
   c. Signed Form 6/Agency Agreement & CMA
   d. Marketing Invoice via Campaign Track (until Eagle Software has the trust account running)
4. (NSW) Send the Agency Agreement and Sales Inspection report to Vendors Solicitor
5. Add the listing expiry to your Eagle Software calendar and invite the agent
6. Convert the property to a Listing via Eagle Software (should be entered as an appraisal from the agent)
7. Once VPA has been received and a receipt has been emailed from FCRE to CSC, save the receipt to the GDrive and Eagle Software and email vendor with the appropriate canned response
8. If Auction, book the auctioneer and create an Auction calendar invite to agent

9. (QLD) Order property searches via National Property Data and save to Dropbox and Eagle Software
10. Order marketing collateral (brochures and signboard) via Campaigntrack or Printforce **(only once money is received and receipted)**
11. Book Newspaper advertisements via Campaigntrack (if applicable)
12. (QLD) If the property is a unit, order the **disclosure statement from body corporate** or ask your agent to organise with the vendor - This is needed to create the contract.
13. (QLD) Create the Sale Contract and save to the Dropbox and upload to Eagle Software - **must not** enter contact details of the Vendor on the Sale Contract, names **only**
14. If Auction, add the auction documents to the Dropbox and upload to Eagle Software (QLD and NSW different forms)
    a. **Bidder Registration Form - required**
    b. **Conditions of Sale for Public Auction - required**
    c. Authority to Bid on Behalf of Another
    d. Authority from Buyer to Convey Telephone Bid
    e. **A Bidders Guide - required**

15. CSC to send email to Sales Agent for review of the listing preview links (Sales Agents must approve in writing) before going live
16. Upload new listing to Social Media accounts (Mark to provide strict guidelines)
17. Once listing is live, send the templated email to view vendor with a link to the online listing

Marketing

1. Apply a Marketing Action Plan in Eagle Software
2. Create Marketing Invoice based on the signed Marketing Planner via Campaign Track
3. CSC to send the Marketing Invoice together with the signed Agency Agreement to the Vendors
4. Request photos and marketing copy from the Sales Agent
5. Once VPA has been received, CSC can now book the marketing
6. Download pdf proofs of the marketing and email to Sales Agent for approval
7. Once a written approval from the Sales Agent is received, we can approve marketing brochures and signboard in Campaign track
8. Book a Newspaper advertisement and create proofs for agents, CSC to approve the weekly Newspaper advertisement.
9. Supply Vendor a copy of the photos once received

Contract Management

1. Sales Agents will send the signed copy of the **Conditional Contract** and a **Sales Agent Apportionment Sign Off Sheet (commission splits)** to the shared email (clientsuccess.nsw@agencyhq.net.au or clientsuccess.qld@agencyhq.net.au)
2. CSC to complete title search
3. CSC to send title search and contract to Head of Operations
4. Head of Operations will do Compliance Check
5. Once approved by the HOO, CSC will proceed on processing
6. CSC will send a copy of the contract to the Buyer, Seller and both of their solicitors with templated email from (clientsuccess.(qld or nsw)@agencyhq.net.au
7. Enter contract details into Eagle Software until it goes unconditional
8. Send templated calendar invite to agent, CEO and HOO with the important dates
9. CSC will reach out to Solicitors

   All Conditions must be satisfied

Unconditional

1. Once notification has been received from both solicitors, CSC will process the unconditional contract status
2. CSC to update listing status in Eagle Software to Unconditional/Exchanged (will mark the property as sold)
3. CSC to send Settlement Advice email to Sales Agent to check their commissions
4. CSC to send vendor the commission tax invoice
5. Sales Agents to provide bank details of the Vendors

Pre-settlement

1. Call Solicitors and ask for the schedule for settlement date

Settlement

1. Both solicitors to provide us with a Settlement Letter - keys cannot be handed out until both settlement letters have been received

2. Send email to Vendors with the Settlement Statement
3. CSC to fill out Trust Payment Authority from ACCOUNTING TEAM
4. Update listing card status in Eagle Software to Settled

Fall over

Possible reason for fall over (financial/B&P)

33. Written notification from solicitors
34. Refund the deposit
35. A form from ACCOUNTING TEAM to refund
36. Change status back to listing

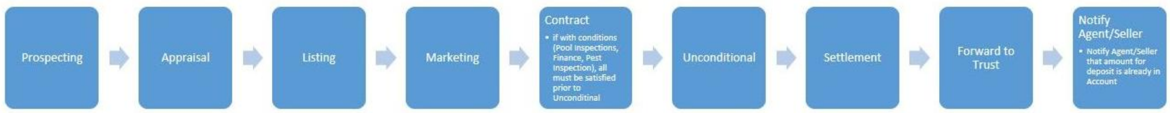
Withdrawn

(property has not sold in required time frame or not happy with the services)

2. Written notification from the owner to withdraw the property
3. Marketing that needs to be refunded, ACCOUNTING TEAM to refund, ask bank details of the Vendors in writing
4. Remove listings
5. Remove sign

Sales Process Checklist

PROCESS FLOW:



PROCESS	TASKS	
PROSPECTING		☐
APPRAISAL		☐
	- CMA preparation	☐
	- enter the property in Eagle as New Appraisal	☐
LISTING		☐
	- Marketing quote preparation	☐
	- Prepare Form 6	☐
	- Eagle (Convert the property as New Listing)	☐
	- Marketing Tax Invoice Preparation (MYOB) to be done by CSCs	☐
	- Issue Marketing Tax Invoice	☐
MARKETING		☐
	- Ordering Marketing supplies	☐
	- Agent to provide web copy, photos, instructions on OFI dates to CSCs	☐
	- CSCs to enter property description in Eagle before they push the property in website portals	☐
	- Order TS & Prepare Contract of Sale (send draft to agent)	☐
CONTRACT/ UNDERCONTRACT		☐
	- New Contract of Sale Received	☐
	- Browse through the Contract	☐
	- Email Seller & Buyer Solicitor separately and attach Title and Contract – to be done by Agent	☐
	- Email Seller and Buyer and attach Title and Contract – to be done	☐

	by Agent	
	- Detailed Compliance check to be done by CSCs	☐
	- Issue Deposit Receipt from Trust Dept	☐
	- Update Property details on the CRM - Eagle	☐
	- Conditions Met/Satisfied Conditions Email from Solicitors should be forwarded to the CSCs	☐
UNCONDITIONAL		☐
	- Change Status of listings accordingly on Eagle	☐
	- Reconcile Marketing	☐
	- CSCs Email Settlement advice (Financial details) to Agents	☐
	- Agent to provide the following:	☐
	☐ Vendors' Bank Details & New Address	☐
	☐ Signed Commission Sign-off Sheet	☐
	☐ Agent Commission Invoice	☐
	☐ Vendor's forwarding address	☐
	- CSCs to Prepare Commission Tax Invoice	☐
	- Send Commission Tax Invoice to Vendor Solicitor once approved by Agent	☐
	- Request for Tax invoice for other agents if contractors	☐
	- Agent to ensure below list is completed prior settlement - Commission Tax Invoice - Contractor Tax Invoice (if applicable) - Signed Commission Sign-off sheet - Vendor Bank Details	☐
Settlement		☐
	- Email Received from Solicitors that property has already settled	☐
	- Update Settlement Authority	☐
	- Forward Settlement Authority to Trust Dept	☐
	- Change Status property to SOLD in Eagle software	☐
Notify Agent/Seller		☐
	- Send Settlement Statement to Agent for review before sending to Vendor	☐
	- Send Settled Advice to Agents	☐
	- Removal of Signboards	☐

Listing Case Studies

Property	Address	Sale Method	Marketing Spend	Advertised Price	Days on Market	Sale price	% ↓ or ↑	Number of registered bidders	Origin of the Buyer

LISTING CASE SAMPLE CASE STUDIES

Property Suburb	Sale Method	Marketing Spend	Advertised Price	Days on Market	Sale Price	Number of registered bidders	Origin of the Buyer
Eastwood	Sold after auction	$6,564	$1,150,000	46	$1,300,000	4	Magazine
Beecroft	Sold prior auction	$5,434	$850,000+	15	$936,000	Sold prior	Data base
Epping	Sold at auction	$6,564	$1,000,000+	28	$1,210,000	9	Local newspaper
Eastwood	Sold at auction	$6,514	$950,000+	22	$952,000	2	Magazine
Epping	Sold at auction	$7,179	$1,275,000+	26	$1,300,000	4	Newspaper
Epping	Sold at auction	$5,329	$675,000+	26	$756,000	6	Newspaper
Ryde	Sold at auction	$5,074	$675,000+	26	$793,000	12	Sign board
Ryde	Sold at auction	$5,184	$775,000+	26	$902,000	6	Database

Agency HQ OFI and Auction Checklist

Pre OFI:

☐ Call/SMS vendor as a courtesy reminder (30 minutes prior)
☐ Directional Signs – minimum of 2 on relevant corners where permitted
☐ Don't park out the front, leave spaces for buyers to park
☐ Inspection flag on sign board
☐ A-Frame in prominent position
☐ Arrive early for set up (5+ minutes)
☐ Property keys and alarm code (if applicable)
☐ All lights on
☐ Air-con/heating if required
☐ Background music on
☐ Drapes/curtains open
☐ Toilet lids down
☐ "Thank you for removing your shoes" sign if applicable
☐ " Thank you for not using the toilet" sign on all toilet lids
☐ Vendors should not be in attendance
☐ Two people to attend (must hold certificate of registration or Real Estate licence)
☐ Turn your mobile phone off

OFI set up (on main table/bench top):

☐ Property brochures
☐ Privacy notice on display (laminated
☐ OFT consumer guidelines
☐ Personal profile brochures or DL's
☐ Business cards
☐ OFI Attendance sheets (bound) to take names
☐ Pens
☐ Copy of Contract
☐ Letter of potential rental (Laminated)
☐ Property summary sheets (bound)
☐ Area map showing schools, parks, shops, transport etc.
☐ Oil burner or scented candle on

Post OFI:

☐ Call vendor straight after closing up with verbal update
☐ Call every attendee within 24 hours to qualify for purchase or potential sale and refer to Property Management
☐ Enter all buyers in Eagle
☐ Send written vendor report to your vendor every week
☐ Hold face to face meeting with vendor every week

Expectation meeting Agenda

Part A: Our Communication program

☐ Clarify your role and the role of your CSM (if applicable)
☐ Daily phone communication, Best number.
☐ Weekly face to face meetings (Monday evening best)
Date and time:
☐ I will brief the auctioneer the day prior to auction
☐ Weekly written vendor activity reports
☐ Complete transparency in all feedback
☐ Only legitimate concerns continue to re-surface (don’t shoot the message)

Part B: Open for Inspection

☐ No inspections or marketing until contract, agency agreement and owner marketing contribution
☐ Is someone else involved in the decision making (e.g. friends, family or solicitor) as we would need to include them in our communication.
Who:
☐ How to present the property (nice music and smells, de-clutter, no jewelry or $ left out, lawns mowed, garden neat etc.). First impressions are lasting
☐ Choose the time of the OFI
☐ My follow up with the buyers – when and how often
☐ What does the vendor expect from me?
Details:
☐ Fill out and return the “Property Summary”
☐ Other properties in the area for sale that could influence our price positively or negatively:
☐ Leave a hand-written note after each inspection as I like you to know immediately
☐ Private inspection from time to time.

Part C: Offers

☐ First offer can be the best offer and we’ll insist it’s on a contract.
☐ Parking buyers until auction
☐ What is the reason for sale so you/me/neighbours are all on the same page
☐ If property is well priced, number of offers/price indication in first week
☐ I will only ever recommend once, that you accept an offer

Part D: Pricing strategy

☐ Must give a perception of good value based on recent comparable sales
☐ Good offers are on a contract with S66W (or 30C in QLD) and a cheque
☐ Draw the buyers pyramid
☐ Draw the buyers wave
☐ Refer all inquiry through me (other agents, neighbours, etc.)
☐ We must get the guide positioned correctly by week 2

Part E: Gauging buyer interest

☐ The best indicator of buyer interest is contracts issued (contract drop outs can be as high as 80%)
☐ If the property is well priced, number of contracts issued in first week

Auction Guidelines

- Low number of buyer inspections and no contracts issued. A suggestion is made to lower the price guide
- Good number of buyer inspections and a few contracts. Marketing and price guide remains the same
- Low number of inspections. Interest is high with only one buyer and they are suggesting a strong offer. We will need to consider negotiating that offer
- Good number of inspections, interest is high and one or several buyers are suggesting weak price, price guide and marketing remains the same
- Good number of inspections and multiple interested parties suggesting strong prices. A suggestion of shifting the price guide higher is discussed
- If the strategy is correct, contracts should be requested after first week

Part F: Advertising

☐ SWAT team when?
☐ Signboard – where and when it will be installed?
☐ You will be able to sign off all marketing before print and upload to the internet
☐ Letterbox drops and open home invites will be delivered
☐ Sometimes things can go wrong. Websites and media ads can sometimes misprint or make mistakes. If you notice this before just call and I will rectify

Part G: Reserve Price

☐ To be finalized in writing prior to auction
☐ Full brief given to auctioneer the day prior
☐ Set reserve in line with feedback
☐ Full discussion in our meeting the week of the auction

Part H: Close

- ☐ Do you understand our strategy now?
- ☐ Any questions?
- ☐ Buyers could request:
  - Shortened/extended settlement Y/N
  - 5% deposit or deposit bond Y/N
  - Other changes (land tax /inclusions)

Vendor Weekly Meeting Agenda

1. Review marketing and current price guide

2. Review enquiry (volume and quality)

3. Specific attributes and concerns (buyer feedback)

4. Price indications/offers from potential buyers and contracts issued/contract lost

5. Refer to week 2 or 3 auction guidelines

6. Address the next week (Price guide/marketing need to be adjusted)

7. Identify competing properties that have sold, had price adjustments or have come onto the market during the last week

8. How does our owner feel the campaign is going?

____
____
____

9. Is there anything I am not currently doing that you would like me to do?

____
____
____

10. Anything else?

____
____
____

11. Set reserve price (address this in the week prior to auction)

____
____
____

Reserve Price Meeting Agenda

1. Review marketing channels and coverage, total enquiries and total inspections
   ____
   ____
   ____

2. Review all feedback (positive feedback and legitimate buyer concerns)
   ____
   ____
   ____

3. Review all offers
   Q: Based on all the feedback on the property and price, what price point would you be comfortable to sell at tomorrow?
   ____
   ____
   ____

4. Total Contracts lost and why?
   ____
   ____
   ____

5. Number of expected bidders for auction and their price level
   ____
   ____
   ____

6. Discuss other competing properties that have sold, come onto the market or had price reductions over the last 4 weeks and what affect they may have had on our selling program
   ____
   ____
   ____

7. Explain the auction quadrant
   ____
   ____
   ____

8. Explain the 3 scenarios of Auction

____
____
____

9. Discuss your strategy on the day (what if only 1 buyer etc.) and possible use and level of vendor bid

____
____
____

10. Set the reserve price

____
____
____

Measuring

Sales Manager Audit

Rate yourself in the following key areas of sales management.

1.	Do you know your market share in your BDA?	/10
2.	Do you know total available commission per year in your BDA?	/10
3.	Do you have a current business plan?	/10
4.	Are you personally involved in, or across, every sales transaction in your office?	/10
5.	Does every new vendor receive a welcome call from the Auctioneer?	/10
6.	Does every new vendor receive a welcome call from you?	/10
7.	Does every new landlord receive a welcome call from you?	/10
8.	Do you attend vendor meetings or at least call vendors to identify gaps to assist you coach your lower performers?	/10
9.	Do you call every missed listing from your team to find out why?	/10
10.	Everything you say and do is being watched by your team. Are you "on" every day or do you carry your baggage into the office with you?	/10
11.	Do you run productive sales meetings with a focus on aligning stock to market and matching buyers?	/10
12.	Are you prospecting for new people to join your team every week?	/10
13.	Are you meeting and interviewing new people to join your team every week?	/10
14.	Do you have an employment agreement which includes minimum performance standards and KPI for every role?	/10
15.	Do you actively help your people make a plan to increase productivity?	/10
16.	Do you manage people in lie with your minimum performance standards and KPI?	/10
17.	Besides your Christmas party, do you have any fun/team building activities during the year?	/10

18.	Do you know the names of the husbands/wives/kids of your team members?	/10
19.	When somebody new joins your team, do you use the 90 day success plan to keep them on track?	/10
20.	Do you do some form of team training every week?	/10
21.	Do you hold 1 on 1's with your team on a regular basis?	/10
22.	Do you regularly and openly recognize and praise individuals for their wins? (in sales meetings, via office emails, sms, voicemail)	/10

Customer Service and Conflict Resolution

The 4 levels of Customer Service

Customer service standards have changed over the last few years and will continue to change. Customers and Clients are judging you against other industries & other sectors not just the Real Estate office on the other side of the road.

When someone receives a 6-star customer service from the Hilton Hotel then that is the benchmark they will judge you on.

Businesses that move from good to great are not about mediocre service they are about World class service.

The entry level for this is now the basics: **Availability and accuracy**
Real World Class 6-Star service is also about: **Partnership and advice!**

These are the 4 levels of Customer Service

Research
The Gallup Organisation, for over 60 years, has been one of the world's most respected companies in the measurement of human attitudes, opinions and behaviour. This 20-year research study complied common data on what more than one billion customers "really want" irrespective of industry or sector. As you can imagine, the Gallup study is the largest of its kind ever undertaken and so the following extract provides a compelling framework in the quest for customer satisfaction.

Summary
There are four levels on the ladder toward customer satisfaction:

1. Accuracy
2. Availability

3. Partnership
4. Advice

The first two levels only prevent dissatisfaction. It is steps 3 & 4 that create satisfaction.

Step 1

Accuracy is the first step to preventing dissatisfaction. For example, customers expect their bank statements to reflect their balance accurately. When they eat out, they expect the waiter to serve what they ordered. It doesn't matter how friendly the employees are. If the organisation consistently fails the accuracy test, then customers defect. Accuracy is demanded and expected by the customer so meeting this expectation is the first step to preventing dissatisfaction.

Step 2

Availability is the next level. Customers expect you to be accessible when they need you. For example, if a waiter is unavailable when you are ready to order, you become dissatisfied, Importantly, the availability of the waiter does not provide you with satisfaction it simply prevents dissatisfaction. ATM's represent an innovative example of making banking more accessible yet at the same time ATM's do not differentiate one bank from another. Once again, they prevent dissatisfaction, but do not in themselves represent satisfaction.
Accuracy and availability are necessary steps in preventing customer dissatisfaction and build a platform for the following two steps that provide satisfaction.

Step 3

Partnership represents the first level of satisfaction. Customers want a service/product provider to listen to their needs and respond accordingly. In simple terms, partnership means that the customer feels you are on the "same side of the fence" as they are. For example, airlines create frequent flyer club to offer special treatment to loyal members. Importantly, partnership lives & breathes in the everyday actions of your employees not in technology or step-by-step processes. Effectively offering this level of customer satisfaction builds a solid platform for the ultimate step in customer satisfaction.

Step 4

Advice is the highest level of customer satisfaction because customers feel the closest bond with organisation that helps them learn. Companies are avidly trying to transform their tellers/clerks/sales people into consultants because they have realised that advice breed's loyalty. As for Partnership above, the learning usually occurs between one employee and one customer and is a very sensitive interaction. It required a special kind of retail clerk or bank teller to find just the right time and just the right way to educate a customer. Hence, employees that have the talent to listen and teach are invaluable in the quest for customer satisfaction.

Customer service Utopia:

"They don't just come back, they don't simply recommend you, they INSIST their friends do business with you".

6 Star Customer Service

What does it mean?

- Being acknowledged & recognized as a customer focused organization
- A company that is known for exceptional customer service delivery
- A company that is successful at the execution of customer service strategy
- A company that has a documented customer service charter
- A company that has a problem solving culture empowering employees to resolve issues quickly or refer them on in an escalation process – that ultimately converts the person complaining inti raving fans of the business
- A company that conducts regular customer surveys – NPS/Landlord & tenant surveys/Internal surveys
- A company that is always available for its customers and values its customers
- A company that engages in one to one customer dialogue
- A company that provides value to its clients
- A company that has a customer service DNA which relates to how it treats its customers and how internally they treat each other
- A company that keeps its promise
- A company that surprises customers by over delivering on its promises
- A company that responds to all customer requests with a sense of urgency
- A company that understands all business is in the business of relationships

The number one rule is : **Don't take it personally** – If you take it personally, you will become defensive and this will not work well to resolve an issue.

<u>A well-handed complaint</u>

Complaint marketing:
A well-handed complaint can actually increase customer loyalty

A well-handed complaint will:

- Educate a customer in the workings of your business
- Ensure that your customer will be easier to deal with in future contacts
- Be an opportunity for you to impress your customer with your sense of responsibility in business

Remember the impact a poorly handled complaint can have on business. A customer experiencing difficulties in achieving a resolution is likely to spread bad press about your business:

- An unhappy customer tells 10 to 25 others about a bad experience
- Internet customers are becoming increasingly aware of the possibilities for tarnishing your image following a poorly-handled complaint (making use of e-mail/Facebook/Twitter/Blogs, etc. with colleagues and other business partners)
- Badly informed about your business
- Are time-consuming or give up and go elsewhere

The cost of winning new business compared to retaining existing business can be as high as 10 to 1. An effective feedback management process will be far-reaching across your business – touching the parts that most other customer retention systems fail to get to! Your processes will be more customer-focused with customers aiding the business through quick reporting of possible problem areas, You will have a valuable source of information for predicting service breakdowns – ideal for feeding in to quality processes and systems.

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6 Steps to “6 Star conflict resolution”

What is conflict resolution – why is the world broken up?

Because it’s a time to re-create, re-view, re-focus, re-invent, re-discover and move forward.

It’s a time to “re-solution” the problem… it’s time to go inti “re-solution mode”

So what do you do?

Think: What is it that I want to get out of this encounter?
What is the purpose of the encounter?
What are the key results you want to achieve?
Will I need to modify my behaviour to deal with this encounter?

Also think of it as a workout for your emotions. Controlling your emotions is like building muscles. Take pride in controlling your temper – get a grip on self-control. The more you practice being calm, the better you get at it. Think – this is an opportunity for me to be self-controlled and calm. The more I do this, the better I will become at it.

Difficult people are the easiest people to deal with!

Why?

Difficult people are predictable!

Difficult people are not just difficult with you. They are into themselves and are usually difficult with everyone! You can prepare for them, plan for them, scheme and collude against them because they are stuck in their ways. It means use your brains more than you use your emotions!

You can't change a difficult person by being difficult yourself. Decide what you want from the encounter and maneuver, trim and be prepared.

6 Steps to "6 Star conflict resolution"

1. Listen – actively
2. Sympathise
3. Don't justify
4. Make notes
5. Apologise & Agree on a course of action
6. Follow through

Listen

Listen and show you are listening by your body language. Make notes of what is being said – if in person " Do you mind if I take some notes on what you're saying". If over the phone, "can you repeat that please, I'm taking notes on what you're saying". The more attentive you are, the more you will diffuse the situation. Ask questions at appropriate intervals – "just to clarify what you're saying…" or "I just want to get this down right, can you tell me about that part again…".

Sympathise

This is not the same as agreeing. This does not mean you are accepting liability either or that you are surrendering. It helps enormously though to take the heat out of the situation.
It confirms that you are listening and that you are not trying to evade the situation.
"I'm really sorry to hear what you are telling me…"
"That does sound awful…"
"That would be difficult to deal with…"

Don't justify

The irate person on the other end of the phone is not in any way interested in the fact that half the staff off with the flu, that you are having car trouble or that your child is having problems at school and that you believe you are overworked.
It's not their problem. Whatever you think is justifiable reason (excuse) this is not the point to be advising them. In the life of the complaint, this is not the milestone point to be justifying the situation. Is there any time that is right?

Yes – later once the heat has taken out of the equation then it is fine to add it in as “I’m not trying to justify anything, but you need to know…”
Major warning – This is also not the point to be inferring that what the client/customer is saying cant be 100% true. “I cant believe its that bad…” or “ This cant be 100% true…” these comments are kerosene to hot embers.

Make Notes
There is definitely something reassuring about having someone take notes about your complaint. That doesn’t mean you need to be a bureaucrat and record every word on form 101A. It’s about taking a simple record of who is complaining, when and what about. Why? – It reinforces the listening message and also creates what are called “contemporaneous” notes (which need to be dated and signed by you) which may be used as reliable documents in a tribunal should things go really wrong.

Apologise & Agree on a course of action
Not only should you tell the client/customer that you are sorry you should also thank them for bringing the issue to your attention. “I’m really sorry Peter that this has occurred and I also want to thank you for bringing this to my attention”. “It’s very important for us as a business to know when things have gone wrong and work on solutions to correct them now and make sure they don’t happen again”.
“This is how I think we should take this forward’ …”How would you like me to handle this from here”…
“ This is how I see us resolving the matter from here”, etc.

Making these statements or asking these questions will help you move this from your in tray and also move you on the way towards turning an angry customer into a raving fan again.

It’s about conveying the next steps in linear order, so there is a clear understanding that action will take place and what reasonably can be done within the timeframe suggested. Also include the linkages that will be necessary to action this matter (the third parties involved) this will also assist to clearly inform why the timeline for resolution may be longer than expected.

Take Responsibility & Follow through

<u>This is the pivotal part!</u>

Deliver what you promised. If you have agreed to call the customer/client back later in the say – do it! What if you have o update? Still call them! Keep calling them even if you have no news until you finally do. This is pivotal and this is where you turn a future detractor into a raving fan!

The easiest way to make a smoldering situation into a roaring fire is to not follow through. Whatever it is email, phone or sending something keep communicating alive (eve if you have no news) and keep resetting the deadline each time.

If you catch yourself sounding like this …
I can't believe that we could get this wrong – the problem is that I believe we are understaffed and with all the staff off this week with the flu and my car not working, it's been really difficult to get stuff done. I'm not really sure when I can get this sorted for you, but I'll try and do something as soon as I can. … by the way, what was your name again?

Then – GO BACK TO STEP 1