**Referring-Working Agent Model** A picture containing drawing

Description automatically generated

**Referring Agent** – Could be a phasing back or retiring agent, OR agent wanting to be exclusively a Rainmaker/Business Development/Outside Marketing Agent, OR an agent moving out of town. A Team player and calls us HIS/HER Team.

**Working Agent** – Agent assigned to do the rest of the transaction work and responsible for listing presentations, follow up and negotiations. Caring, compassionate, resourceful, team player, no ego, peacemaker, availability, trainable. Keeps Referral Agent updated continually throughout each buyer/seller.

**Team Lead** – Team Lead may work some clients for RA or not, depending upon load. Team Lead will assign WAs to each referral from RAs depending upon personalities and WA current loads. If RA requests a specific WA for a specific client, the RA is king/queen!

**Job Descriptions** – Working Agents will be trained with the exact same presentation so agents can be interchangeable for listing appointments when necessary. If Referral Agents will accompany them on listing appointments, then the Referral Agent should be “familiar” with the presentation also. Working Agent will do all the listing appointment preparations and most of the presentation (possibly in conjunction with Referral Agent). Once the listing is signed, the Working Agent will take care of all the details and negotiations.

**Personnel Needs**

* Team Lead – Assist with presentations when Referral Agent not available, assist with negotiations as needed. Train and monitor.
* Working Agents – Team Lead should carefully watch the loan of each so not overwhelmed
* Operations Manager – Oversight of due dates and all transactions. Oversight of marketing & drip systems.
* Admin Assistants – manage details, some may be virtual working from home.

**RA Job Description**

* Refer Buyers & Sellers to Team, Team Lead may distribute to WA’s unless RA has preference
* Accompany on listing presentations if able and desirable to RA
* Stay in touch occasionally during transaction, if desired
* Don’t do the dirty work, that’s our job!
* Cash checks!

**WA Job Description**

* Liaison with Referral Agent, always keep them informed of status of every referral
* Attend weekly meetings
* Listing presentation
* Gathering listing input data
* Market home within Team budget
* Weekly seller updates
* Present and negotiate offers
* Review and negotiate Inspection Items and Repair Requests
* Turn in intermediate paperwork
* Monitor contractual deadlines
* Prepare seller for signing, Utilities changeover
* COE – show up at signing
* Work with referred buyers, show houses
* Write and negotiate offers and inspection items
* Give closing gifts to buyers
* Be sure all data entered in drip system and mailings spreadsheets

**Stats**

* Only 1% of agents sell their business when they retire
* Only 9% of clients use their agent the second time (84% say they would)
* Need to keep marketing and building relationships – Don’t let your sphere die before transitioning to our Stepping UP! program

**Working Agent Personalities –** Personalities are of critical importance. Attitude, understanding who your number one client is (Referral Agents), no egos, peacekeeping, etc. You can refuse to work with a client who is your own personal sphere because you don’t like them or how they work with you, but you cannot refuse the same with a Referral Agent because now you’re messing with their sphere and their income. Must be able to eat “humble pie” sometimes and just plow through! Caring, compassionate, resourceful, team player, availability, trainable. Willing to keep Referral Agent updated continually throughout each buyer/seller.