**Referring Agent Orientation**  A picture containing drawing

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Team Leads should educate new RAs on our systems and processes and their role on their new team. We typically see this transition taking a couple transactions before the RA becomes comfortable with Stepping Up!

Items to have ready: RA Agreement, Team Roster & Numbers, Examples of Your Marketing Items, Your Intro Letter, Your Team Mission and Motto, Onboarding – Presenting the Team (in Ops Manual).

* Review and sign RA Agreement. Explain each section making sure they understand the commission splits and responsibilities. Reassure them that no matter who their client calls first, they get the commission. Explain 2nd and 3rd generation referrals.
* Roles and Responsibilities – It’s time to relax! Your new role:

It’s difficult for some agents to sit back and relax. Help them do that! Once a client goes into contract, they want to start all the busy work they’ve done for years, but that’s our job now!

1) Bring Client, 2) Cash Check, 3) Repeat!

* Your team takes care of ALL: showings, paperwork and scheduling.
* Explain team roles – Admin Agent, Working Agent, Team Lead.
* Who to call with a referral, how is it handled, and who will work it?
* RA contact with clients during transactions:
* Your WA will keep you updated.
* You should check in with your client once or twice during the transaction, and especially after closing.
* You want to keep your client focused on the WA, not on yourself!
* Expect a period of dating as we learn to understand each other and our systems!
* Order Business Cards.
* Website updates – we need your PWs.
* Need your bio for our website and our WAs.
* Sign riders (only if you want to handle the sign calls)?
* Database – Do you have one? We can help you put it together:
* We can extract past sales from MLS.
* We can have Office Manager print out past production records.
* We can pull from your phone contacts.
* Once organized by us, you can sort and qualify clients (A, B, C, D).
* A = Sends you referrals and business.
* B = Potential to send if we show them how!
* C = Need to work on, doesn’t get working by referral as of yet.
* D = Delete out of your system!

**Presenting the Team (may want to do this as a separate hour):**

* Review your team’s marketing program (Intro Letter, Monthly emails & US Mail).
* How to present YOUR Team: Review *Orientation – Presenting the Team*, Watch videos.
* When scheduling appointments, set up times with WA first – Tell your clients you’re bringing a “Business Partner” with you.
* IF desired, have your RA speak with a seasoned RA about how they hand off:

Sherie Broekema – 520-977-4560

Jim Fairchild – 520-360-3411

Shirley Holle – 520-918-5960

* Future outreach:
  + Stay in touch regularly – We’ll have regular events that will give you the opportunity to reach out to your clients just to say hi. This facilitates working by referral!
  + Take them to lunch, coffee, etc – Keep in touch with them, do the fun stuff!
  + Client outreach events – RA responsibilities.
  + Never use the “R” word (Retirement)! Your competitors will use it against you! You’ve Stepped Up to a Team and now have Team Members to take care of the details while you focus on other activities.