

COMPONENTS OF AN OPERATIONS MANUAL:

Leadership Documents

- Mission Statement
- Vision Statement
- Company History and Overview
- Yearly Goals, Priorities and Steps
- Monthly Accountability
- Production Tracker
- SWOT Analysis
- Sales Leadership Reporting
- Leadership Meeting Notes

General Admin

- Purpose of Manual
- Organizational Chart
- Team Roster
- Job Descriptions
- Swim Lanes
- Headshots
- Biographies
- Employee Handbook
- Team Production Historical
- Safety Guidelines
- Health Protocol
- Emergency Procedures
- Human Resources Standards
- Benefits
- Business Contracts
- Charitable Contributions

Standard Operations Procedures (SOP)

- Property Listing
 - Listing Intake Form
 - Listing Change Form
 - Photography Standards
 - Signage Standards
 - Seller Under Contract Form
- Buyer Relationships
 - Offer Form
 - Buyer Under Contract Form
- Lease
 - Lease Listing Intake Form
 - Listing Change Form
 - Executed Lease: Owner or Tenant
- Showing Practices
- Offers and Negotiations
 - Processes for Receiving, Reviewing
 - Processes for Reviewing
 - Processes for Negotiating
- Closing and Post Sale Procedures
 - Post sale activities
 - Relationship Management

Compliance and Legal Guidelines

- Relevant Regulations
- Fair Housing Compliance
- Ethical Standards and Practices
- Record Keeping and Documentation

Technology and Tools

- Software Systems
- Website Management
- Cybersecurity

Director of Sales/Listing Manager

- Director of Sales (DOS)/Listing Manager (LM)Profit Interest Tracker
- Calculating DOS Monthly Override
- Calculating DOS Annual Profit Bonus
- DOS Bonus/Profit Interest Tracker
- Calculating Listing Manager Bonus
- LM Bonus Tracker
- Performance Evaluations
- Book Recommendations

Agent

- Independent Contractor Agreements
- Tracker
- Yearly Business Plan
- Agent Transactions Year over Year(YOY)
- Commission Form
- Scripting
- Do not Call (DNC) Instructions
- Performance Evaluations
- Book Recommendations

Onboarding

- Agent Onboarding Process
- Administrative Onboarding Process
- Team Cap Agreement Example
- Agent Pre-Launch Checklist
- Email Signature
- Launch Agreement
- Contract Class Videos
- Bulletproof Your Transactions
- CRM Training
- Expectations Review

Offboarding

- Exit Agreement
- Employee Exit Interview Notes
- Offboarding Checklist for Agents
- Offboarding Checklist for Administrators

Financials

- Accounting Procedures
- Budgeting and Financial Planner
- Expense Tracker
- Payment Processes
- Wire Transfers
- Monthly and Yearly P & L
- Cash Management
- Payroll
- W2 Employee Bonus
- Commission Process

Recruiting

- Interested Parties
- KPA Request
- Recruiting Event Resources
- Email Invite template
- Social Media Invites Template
- Hourly Employee Payroll Process

Customer Relationship Management:

- Use Instructions
- Dashboard Training
- Client Interface
- Seller Valuation Emails
- Market Reports
- AI
- Complaint Resolution

Marketing and Advertising

- Marketing Resource Document
- Brand Guidelines
- Logos
- Vendor Concierge Book
- Property Marketing
 - On-line
 - Off-market
 - Social Media
 - Print Ads
 - Mailers
 - Virtual Tours
 - Brokerage Tours
 - Open House Processes
 - Feedback Reporting
- Marketing Calendar
- Client Touches
 - Newsletter Template
 - Letters
 - Yearly Invites
- Team Marketing
 - Social Media
 - Marketing Mailers
 - Lead Generation
- Thank You Note Ideas
- EOY Video Instructions
- EOY Closing Statement & Homestead Emails
- Team and Agent Reviews

Events

- Pop-bys
- Conventions
- Seasonal Events
- Educational Even

Appendices:

- Forms and Templates
- Glossary of Terms