

The key to being a successful real estate agent is to have plan. Set Goals and be strict. Its your business so run it successfully.

Mark

Solo Agent

Single-Page Business Plan

Annual Goal

Close 45 Transactions

3 Key Focus Areas

1. Establish Online Presence
2. Lead Generate for New Business Daily
3. Organize COI in CRM Database and systematically grow & contact it

5 Objectives for each Focus Area

1. Online Presence

2. Lead Generate

3. COI Database

5 Objectives

5 Objectives

5 Objectives

1. Set up and/or update all social media network profiles. Establish general action plan for communication on each network.	1. Lead Generate every Monday - Friday for 3 hours (9:00am to Noon). Alternate contacts to SOI, FSBOS, Expires & Just Listed/Solds.	1. Contact all my family, friends, past clients, and lead to get updated contact information.
2. Create personal landing page linking al social media networks.	2. Meet w/ accountability partner every Monday morning at 10:00am to hold me accountable to my goals.	2. Contact 50 people per week until everyone has been contacted, and all updated info is received.
3. Complete 4 Agent Websites for 1) Sellers; 2) Buyers; 3) Neighborhood Farm; and 4) Blog.	3. Be faithful to my calendar! Time-block my lead generation times so I am no longer available in the mornings.	3. Enter all contacts in Database Management System. Add 10 new contacts per week to database.
4. Locate & attend 3 training courses on internet lead generation.	4. Role play scripts with an accountability partner regularly.	4. Attend CRM trainings to help me get everyone uploaded, create & launch campaigns.
5. Develop blog theme, create action plan and start blog posts.	5. Obtain 3 new listings, 3 buyer contracts, and 4 closed transactions per month.	5. Systematize campaign contacts & calendar.

Guide to creating a sales process

Build a repeatable sales process that guides and supports sales teams through the entire sales cycle from the first touchpoint with a prospect to the close of a deal.

According to [Marketo](#), when sales and marketing teams are in sync, companies become 67% better at closing deals, but only 30% of CMOs have a clear process or program to make marketing and sales alignment a priority and a mere 44% of companies are using [any kind of lead scoring system](#).

To reach the kind of synchronization state that drives higher sales, a company needs to follow a clear-cut process with explicitly defined rules and criteria. A Harvard Business Review [study](#) found that there is an 18% difference in revenue growth between companies that define a formal sales process and companies that don't. So it seems that creating a reliable, scalable sales process is of utmost importance to all companies that have their eyes set on growth.

If you're wondering how to pull this tricky task off, we've gathered the most pertinent advice that will guide you the right way.

Improve Your Sales Processes in Minutes

Convert more leads to deals and increase your sales figures.

Understand and document your current sales cycle

The average sales cycle length is the amount of time it takes to close a deal, measuring from the first touchpoint with a prospect to the conversion point, averaged across all won deals.

An [analysis](#) of pipelines of hundreds of companies has revealed that the average length of Lead to Opportunity (or from MQL to SQL) is 84 days and the average length from Opportunity to Close (or from SQL to Deal) is 18 days. That puts the average sales cycle length at 102 days. This, of course, varies significantly based on the source of the opportunity, the quality of leads, the complexity of the sale, and so on.

However, before anything else, it must be said that there is no single *right* sales cycle. Different markets, products, and internal team dynamics mean that the only way to develop a world-class sales process is to know your typical customer sales cycle like the back of your hand.

The most important step to building a killer sales process is to audit your baseline and document every step that a lead goes through until it converts. If you've never done this before, you'll be surprised to see how much chaos and confusion can cloud what seems like a straightforward process. Only by knowing what needs to be changed or improved can you confidently begin implementing new tactics and strategies.

The average sales cycle length is 102 days. Image Source: [Pexels](#)

To trace back the steps your sales reps took with each lead, accurately answer these questions and you'll quickly see a clear picture of the current state of your sales cycle.

- How did you learn about new leads? When were you notified? How were they distributed?
- What was the initial form of contact – a phone call, an email, a face-to-face contact? How long after they came in?
- What questions were asked and how were they answered during the first conversation?
- When were you able to make contact with the new leads (1st call or email, 1st follow-up, etc.)?
- How did the sales rep handle and coordinate the follow-up? Did they use a reminder tool, made a note in your CRM system or relied on their memory?
- What sales material did the lead receive? At what stage in the cycle was it given to the lead?
- What was the main reason for your closed-lost leads?

Guide to creating a sales process

- Roughly, how long did it take for the lead to move from one stage to another?

Knowing where you stand before you make any changes to your sales process will help you measure their impact and ensure the right decisions are made along the way.

The goal of every sales team is to [shorten their sales cycle](#). The shorter a company's sales cycle, the faster they make money, simple as that. That's why sales cycle length is one of the most important metrics measuring the efficiency and effectiveness of a company's sales team. Poring over the sales cycle statistics to find points in which leads slow down or speed through in the hopes of discovering ways to optimize the process, is a number one priority for sales operations professionals. Here are three ways how to measure the length of your company's sales cycle:

1. When a lead is created. The most obvious way to recognize the beginning of a sales cycle is to track when a lead is created in your CRM. Then, to know the length of your sales cycle, you simply look at when that deal is closed. It's worth noting, though, that lead duplication issues and the variability of when leads are created and when they're worked can skew your analysis.
2. When an opportunity is created. Some sales teams choose to consider the time when a lead is converted into an opportunity as the beginning of the sales cycle to have more contextual information on their deals in the CRM and reduce the time it takes to clean the leads. Because the changing of the lead status is a manual task carried out by a sales rep, there is often a risk of it not being created along consistent criteria. Enforcing strict rules for the process when a lead should be converted to an opportunity is crucial to ensure you have an accurate view of your pipeline.
3. When the sales conversation starts. Measuring the actual conversation length of closed-won deals is probably the most accurate gauge of how long it takes for a lead to convert. However, this method also carries the human error risk, as it relies on a sales rep to update the CRM for every email they send or every prospect they target.

The solution that many sales teams are finding is to [automate the entire process](#). And it can be done by choosing [a modern sales software like Teamgate](#) that can analyze conversation length, automate CRM data entry, and create reports by rep, deal, team or company to reduce the burden of sales cycle analysis.

The typical stages of a sales pipeline and how to create one

Think about sales stages as milestones in your sales process, signaling how far from the typical conversion point your leads are. Although the exact stages and their names vary from company to company, the basic idea is the same – leads are either in an open stage or in a closed stage, such as won or lost.

As an example, here are the default stages in [Teamgate](#). You can customize them as you like.

For the sake of this article, let's focus on the typical stages of a sales pipeline:

- Lead generation. At this stage, a company focuses on finding and attracting new prospects through marketing campaigns, aiming to capture their contact information (inquiries). The most effective B2B marketing methods used to generate leads include email, events, and content.
- Lead nurturing. Once a lead expresses an interest in a product or service, they're usually entered into a lead nurturing campaign to establish the pain points and continue to foster the relationship. Marketing automation is the go-to tactic to further qualify leads and send the best ones to sales. According to Forrester Research, companies that excel at lead nurturing generate 50% more sales-ready leads at 33% lower cost.
- Marketing Qualified Lead (MQL). Based on your definition of a marketing qualified lead, your CRM can use lead scoring to track meaningful activities and behaviors to determine which leads are more

Guide to creating a sales process

likely to become customers. This is a vital stage in your sales process that will help you ensure your sales team is fed high-quality, sales-ready leads.

- Sales Accepted Lead (SAL). Once sales receive a lead from marketing, they need to check if it matches the key targeting criteria and either accept it or decline it. Typically, SALs are identified as having a verified propensity to buy.
- Sales Qualified Lead (SQL). SQLs represent a quantifiable business opportunity with a clarified need, timeline and budget. They are close to making the final purchase decision and can either move to closed won or closed lost opportunities.
- Closed deal. At this stage, around [27%](#) of opportunities convert to deals, according to [Capterra](#). Assisting with implementation is one of the tactics that sales reps use to improve and speed up the conversion process.
- Post sale. A sale is not the end of the pipeline, as the customer relationship continues to develop and both sales and marketing teams should work to further engage buyers and add value through loyalty programs, upsells and cross-sells.

If you're just [creating your sales pipeline](#), there are a few basic rules you can follow to build clearly defined sales stages and a smooth process:

1. Remove ambiguity. Make sure each stage of your sales cycle is self-explanatory and immediately clear. The best way to examine the current status of your sales cycle is to test it on a new hire. If a new sales rep can't see a difference between Stage1 and Stage2, it means you have a problem.
2. Define stage criteria. One of the factors that will determine whether your sales stages are easy to understand is knowing the 'trigger' that moves a lead from one stage to another. To maintain consistency and clarity in your pipeline, ensure that every sales rep knows why and when to change the status of a lead.
3. Take on the buyer perspective. The new school of sales teaches that the sales process should reflect how a customer buys, not how a sales rep sells. This means your sales stages should be part of a buyer's journey, not the seller's steps. Map out your buyer journey to identify the key stages and replace seller-centered milestones, such as "Demo Completed" and "Trial" to buyer-driven stages, such as "Evaluating solutions" and "Technical Fit Assessment".
4. Ditch the linear way of thinking. The order in which milestones are achieved is becoming less and less important, as sales reps start recognizing that different customers make decisions differently. Rather than sticking to a rigid, linear process, allow your buyers to progress through the funnel as they like, even if that means they sign up for a trial before watching a demo. Focus on the list of activities that need to happen to make the sale possible and let the buyer follow their own path.
5. Monitor and iterate. Since every company is unique and follows a different sales process, there is no single optimization strategy that can kick your business into higher gear. However, you should make it a priority to track the time leads spend in each stage of your sales cycle to quickly identify optimization opportunities. If you notice that leads tend to linger at one stage or even drop out altogether, you will be able to put some measures in place and prevent deal loss.

The benefits of a daily routine for your sales team

Poor time management will always result in [disappointing sales performance](#). Sales reps are often masters of multitasking, but even the best can benefit from a daily routine that helps to set the priorities straight and

Guide to creating a sales process

ensure the key tasks are accomplished on time. To help your team drive the sales performance through the roof, introduce some practical habits that will become part of their daily schedules.

1. Review and plan before you wrap up for the day. Take 10-15 minutes at the end of each day to review your pipeline and prioritize the next day's to-do list. Check your calendar events, meeting notes and emails to ensure no important information falls through the cracks endangering your ability to close.
2. *Here's an example of Teamgate's agenda that comes in handy for busy salespeople.*
3. Start your day strong. While you're sipping on your first cup of coffee, review your to-do list from the day before and scan through the inbox to see if there are any high-priority issues that need to be addressed immediately. The key here is not to get distracted by the gazillion of low-importance emails and requests. Sticking to a plan will help you stay on track no matter how many tasks you have to juggle.
4. Group your tasks. The best way to tackle the most important tasks during your most productive time of day is by organizing your tasks into groups. Instead of handling each task independently, set time aside for a set of tasks that require a similar level of energy and type of approach to reducing the time wasted on readjusting and refocusing your attention. By carving out a certain amount of time for each group of tasks and scheduling them into your calendar, you will be able to better manage your time and keep your mind focused.
5. Automate where possible. With so many useful tools at their fingertips, salespeople are learning to free up time in their schedules and focus on doing what they do best – engaging with customers and closing deals. Leverage technologies available to you to make sure your time is spent on activities that have the best ROI.

Conclusion

The biggest mistake you can make is to treat your sales process as a one-and-done project. Making a habit of tracking your sales performance metrics on a daily basis and reevaluating the sales process every five to six months is a surefire way to ensure your sales process map is regularly updated and remains a work in progress, as it should.

Instead of wasting your time on manual data entry, cold leads and tasks that detract your attention from the most important task at hand – selling, improve and modernize your sales process with the help of a [smart CRM that will keep you at your game](#).

I would love to discuss our CRM with you and how it can help you work smarter, handle more, and grow your business more easily than you ever imagined possible.

Leave me a comment & let me know what CRM you use and how it has helped your business grow.

Use these real estate farming ideas to target specific neighbourhoods and become the agent of choice for each community.

Successful geographic real estate farming specialists systematically and continuously market to a neighbourhood brand themselves as the area's real estate expert. They do this by diversifying the types of marketing methods used to contact neighbours to display their many marketing techniques and to avoid annoying recipients through any one method too frequently. Marketing materials should focus on **evidencing the success** of the agent while also showing the neighbourhood that no other agent works harder to get homes sold. Also know that real estate farming is a **Game of Touches**, so the more times that you can contact neighbours the higher the likelihood of getting more listings in the community.

1. Neighbourhood Market Updates

Sending a monthly or quarterly comparative market analysis (CMA) of the community to its members not only shows that you stay aware of the neighbourhood's sales activity, it provides residents with something of value that they will look forward to receiving regularly.

2. Just Listed & Just Sold Emails

Send emails that market your new listings in the Neighbourhood as Just Listed or Sold are critical to evidencing your success to other residents. Remember that frequency of contacts is the key to farming success, so additional emails for Coming Soon, Price Reduced, Back on Market and Open Houses just give you more ways to stay first of mind with the neighbours and show how hard you work to get homes sold.

3. Telephone Calls to Neighbours

As another means of evidencing success like the Just Listed & Just Sold emails explained above, telephone calls to the residents of the farm advertising your new listing as Just Listed or Just Sold typically result in more new listing appointments than any other real estate farming ideas. As with emails, calls around the Neighbourhood to advertise listings as Coming Soon, Price Reduced, Back on Market and Open Houses just increase an agent's chances of getting new listing appointments. Home Owner's Association (HOA) directories can also provide phone numbers and email addresses too. For some great scripts to use to make these phone calls check CRM scripts

4. Door Knocking (Security Guards etc)

Although this traditional activity can be laborious and difficult depending on your area's change in the seasons, there is no better way to obtain the "mind-share" of residents than by meeting them face-to-face.

5. FSBOs & Expired Listings

Staying in contact with For Sale By Owner (FSBO) sellers and owners of expired listings is the most lucrative real estate farming idea since these residents typically have their hand up wanting to sell their home right now. Stay in continuous contact with FSBO sellers by showing how hard you work to market your listings while building relationships by helping them market their home along with your listings. Show the FSBO homes to buyers as much as you can to prove how much more buyer traffic you can generate. For expired listings, create a "hotsheet" in MLS to notify you of any listings in your Neighbourhood that expire each day. That way you can call them and drop off a marketing packet on their doorstep for a chance to interview for the job the first day the listing expires.

6. Open Houses

Real estate farmers know that open houses not just to attract buyers, but more importantly to meet Neighbours. Owners that are thinking about selling love to check out open houses in their Neighbourhood prior to putting their homes up for sale, and hopefully they know that you are the area's expert by now. So they will want to not only check out what other competition on the market looks like, but they will also want to meet and see what you do too. So holding successful open houses is critical to real estate farming specialists.

7. Email Campaigns

Real Estate Geographic Farm. Whether you meet Neighbourhood residents over the phone, at open houses or at their front door, it is crucial to always ask for their email address to be able to "provide them with regular updates about what other homes are selling for so that you know how your home is changing or increasing in value." Once you start creating an email database of all of the residents in the area, it becomes much cheaper and easier to systematically contact them to evidence your success. [Click here for a list of customer relationship managers \(CRMs\) to manage your email database contacts.](#)

8. Social Media & Facebook

Joining or creating a Neighbourhood Facebook page is another effective way to keep yourself in front of Neighbours to show your efforts. Advertising the page on all emails, mailers and to Neighbours at open houses proves your commitment to community involvement. Post things of value on the page like CMAs, just listed & just sold links, open house invitations and other community events and information.

Why use **EXCLUSIVE** agent?



‘ ABODE PROPERTY

Contrary to the trend in Dubai, it is not good practice to list your property for sale or rent with several agents. This adds to the appearance of oversupply and can potentially convey a sense of urgency on the seller's behalf and work against you by achieving a lower price. People presume you are desperate if they see multiple listings!

‘ AGENT NETWORK

Abode Property has an external agent network reach of over 1300 agents. As soon as we have signed exclusively we send an email and SMS to all external agents with your property details and pricing. We actively encourage our industry colleagues to help us. This way you get 1 listing with maximum network exposure.



‘ PREMIUM MARKETING

Abode Property has purchased community top spot for Dubai Marina so therefore can guarantee you will appear on at the top of the **page 1**, maximizing your exposure. Furthermore we offer featured and premium listings to further enhance your property's visibility. Why choose multiple agents when your exclusive agent, Abode Property, guarantees page 1?



‘ OUR GOAL IS TO CLOSE

Our end goal is to achieve a sale or rent for your property. We are experts in our field and offer the best exposure possible as well as the best advice on current market pricing. It's important to get the price correct at the outset. Overpriced and no one will enquire, under-priced and you lose valuable income.



The Fundamental Real Estate Team Model



Buyer's Agent Job Duties & Responsibilities

- Prospect for both seller and buyer leads, convert leads to appointments & close for buyer agency agreements.
- Conduct a thorough needs analysis to ensure Financial service to all buyer clients.
- Ensure that buyer clients are pre-qualified with mortgage lender.
- Show homes to prospective home buyer clients.
- Identify homes to show that meet buyers' criteria.
- Schedule showings of homes with buyer clients, listing agents and/or home sellers.
- Refine buyers' criteria and select additional homes to show as necessary.
- Write & submit all offers to purchase homes for buyer clients.
- Negotiate offers to purchase and oversee entire negotiation process.
- Schedule and attend on-site property inspections with clients and vendors.
- Negotiate all inspection repairs.
- Provide buyer clients access to homes under contract as needed for measuring, inspecting & etc.
- Promptly return all buyer client telephone calls, texts and/or emails.
- Gather and answer buyer questions about potential homes and local community information.
- Provide buyer clients pricing information and market research.
- Educate buyer clients about home buying process.
- Regularly assure buyer clients that lead agent is involved & informed – Promote the team concept
- Keep lead agent informed on all client communications and developments (copied on all emails & update notes in CRM).
- Close buyer clients to written offers to purchase.
- Communicate diligently with administrative staff to ensure the highest level of service to buyer clients from initial contact through contract to close.
- Regularly attend team meetings.

Buyer's Agent Production Expectations

- Lead Sourcing – Buyer's Agent is expected to generate an equal amount of leads & closed transactions from Buyer's Agent's own Center of Influence (COI) and general prospecting efforts to match the number of leads & transactions generated by the team and ultimately closed by Buyer's Agent.
- Team Generated Leads – (definition) Apply the "But-For Test": But for the existence of the team & its listings, would the lead have been generated? So inbound calls from signs on listings and internet inquiries from online listings would be considered Team Generated Leads since but for the team & the listings they would not have been generated in the first place.
- Buyer's Agent Generated Leads – (definition) Leads generated from Buyer's Agent's own COI and other prospecting efforts like Expired Listings, For Sale By Owner (FSBO), Just Listed/Just Sold contacts and etc. Any listings generated by Buyer's Agent will be counted as Buyer's Agent Generated Leads for sourcing purposes too.
- Activity Tracking – Buyer's Agent is expected to input & report all prospecting and client servicing activities regularly for accountability and to keep the rest of the team informed.

Qualifying a buyer

Use the following buyer lead sheet and buyer scripts for real estate agents to convert inbound buyer leads from sign calls and internet leads into buyer consultation appointments. Similar to working with a seller lead sheet, it is important appear confident and prepared when initially speaking with a prospective client on the telephone. Using a series of questions and listening to the responses enables agents to control the conversation while gaining a better understanding of a buyer's needs.

Mark

Buyer Questionnaire & Lead Sheet

Date: _____ Lead Source: _____

Name: _____ Spouse Name: _____

Property Address: _____ City: _____ State: _____ Zip: _____

Phone #s - Mobile: _____ Spouse Mobile: _____ Home: _____ Work: _____

Email: _____ Spouse Email: _____

Family/Children w/ Ages: _____

1. Have any other agents shown you homes? Signed agency agreement? _____

2. Is anyone buying the home with you? _____

3. Are you renting or do you home a home? _____

(a) HOMEOWNER: Do you need to sell your home before you buy? _____

- Have you signed a listing agreement to sell your home? (Y/N) ____ If "NO" use Seller Lead Sheet.

(b) RENTER: Do you know when your lease ends? _____

4. What date do you want to be moved by? _____

5. Are there any negatives to not moving by then? (suggest lifestyle sacrifices, job, costs, schools, family, etc.)

6. Tell me all the benefits of buying a new home: (dig deep & find out WHY?) _____

7. Can you rank your motivation to move on a scale of 1 to 10 for me? With 10 meaning you must by as quickly as possible and 1 meaning you're not sure you'll really buy anything: _____

- What's missing? What would it take to make you a 10? _____

8. Do you know where you want to move to? _____

9. Will you be paying cash or getting a mortgage? _____

10. Have you been pre-approved by a lender? _____

11. How much will your down payment be? _____

12. What price range are you looking in? _____

13. How many BR: ____ Baths: ____ SqFt: ____ Stories: ____ Other: _____

14. What else are you looking for in a home? _____

15. Will anyone else be involved in your home buying decision? _____

16. "Thank you! I'd love to help you find your perfect home. All that we need to do is to set an appointment so that I can help you find the home you're looking for. Does 4:30 tomorrow or 5:00 Wednesday work for you?"

Appointment Date/Time: _____

DISC Behavioral Profile: _____ Why? _____

Qualifying a seller

Use this seller lead sheet and learn how real estate agents use it to ask more questions on pre-listing phone calls to set more successful listing consultations. Agents come across confident and organized when they use a seller lead sheet to take control of telephone calls from potential home sellers. Additionally, the use of a seller lead sheet ensures that agents don't skip any important questions that might leave them unprepared in the actual listing consultation. A seller lead sheet also enables agents to learn more about seller motivation and behavioral profiles to tailor listing presentations to meet clients' needs.

Mark

Seller Questionnaire & Lead Form

Date: _____

Name: _____ Spouse Name: _____

Property Address: _____ City: _____ State: _____ Zip: _____

Phone #s - Mobile: _____ Spouse Mobile: _____ Home: _____ Work: _____

Email: _____ Spouse Email: _____

Family/Children w/ Ages: _____

1. Have you spoken with any other agents? _____
 2. Have you considered selling the home yourself? _____
 3. Why do you want to move? _____
 4. Do you know where you want to move to? _____
 5. What date do you want to be moved by? _____
 6. Are there any negatives to not selling by then? (suggest lifestyle sacrifices, job, costs, schools, family, etc.)

 7. Tell me all the negatives of not selling at all? (same suggestions above) _____

 8. Tell me all the benefits of selling into a new home: (dig deep & find out WHY?) _____

 9. Can you rank your motivation to move on a scale of 1 to 10 for me? With 10 being the highest: _____
 10. When did you buy your home? _____ What price did you pay? _____
 11. Do you know how much you still owe on it? _____
 12. Have you made any major improvements to the home since? _____

 13. Do you happen to have an idea as to what you think it's worth, or should sell for? _____
 14. Do you have a price you won't sell your home below? _____
 15. Tell me about the positive & negative features of your home: _____

 16. How many BR: _____ Baths: _____ SqFt: _____ Stories: _____ Other: _____
 17. How did you hear about me/us? _____
 18. Are you interviewing any other agents? _____ Who? _____ When? _____
 19. "Thank you! The next step is for me to take a quick look at your home and I can answer any other questions you may have. Then you can decide what we do next. How does that sound?" (pause)
"Great! Does 4:30 tomorrow or 5:00 Wednesday work for you?" _____
- DISC Behavioral Profile: _____ Why? _____

Why?

The following outlines the correct process that allows maximum exposure of your properties across all portals. If followed you WILL be on page one on all portals.

Failure to adhere to the policies will leave you on page 2, page 3 of portals and will decrease your leads and ability to earn and hit your target.

Listings

The following criteria will make sure you are on page one always...

- Follow our [Property Listing Retirement](#) write up exactly. This has been written using the portals algorithm to ensure maximum exposure. Do not deviate from this.

Daily

Each and every day you must manipulate the system.

- Why? Our listings are sent to portals via what is called an XML feed.
- What is that? Basically it is a file containing a lot of digital data and dates. This file is sent to portals and they turn it into the listings on each site. The portals look at this file every time it is sent or retrieved from our CRM and merits date adjusts, word changes or photo changes. It sees any of these as a "listing update".
- What happens then? It rewards the "listing update" with a current date. Meaning it sees the listing as new. ALL listings are positioned on a page with several factors which are..
 - **Date of listing**
 - **Featured**
 - **Premiered**
 - **Verified**
- How do we achieve number 1 guaranteed? - We must edit (manipulate) our listings every day. Best way to do this is to change lead photo and edit title. Why? Changing lead photo and editing title have a double impact! It makes it appear as a new listing and editing it tricks the XML feed into seeing it as new. It will put it higher on page ranking and "leads" will see it as a different property [also] as new photo and new title.
- We must also select OUR best properties for featured and premiered for maximum exposure.

What is my best property?

Agents should always have a focus of around **6 to 10 HOT properties** within a bank of 30 or more. It should be a floating focus, meaning, as you sell or rent you should replenish. If you feature, premiere or verify these they WILL generate leads for specific properties making you are generating all your leads toward these and they will close quicker.

- What would class as "my best property?" - Agents should focus on the following criteria to ensure HOT properties.
 - Exclusive contract A signed (If lease exclusive NOC)**
 - Documents submitted (Title Deed, Passports etc)**
 - Trakeesi complete**
 - Propertyfinder verified**
 - Key in office or direct contact (Tenant phone number)**
 - Properties in our prime buildings.**
 - Properly priced to current market value (not as advertised)**
 - VACANT or rented at or above market rates**

If an agent can achieve **A to H** the company will guarantee 100% support to close within 4 to 6 weeks for a sale. THESE ARE HOT HOT properties.

An agent should only look for these type of properties.

- What is an example of this?

You have a client renting or selling in Iris Blue. He has signed Form A, given you passport and title deed. You have key. The price is exactly as market dictates.

- We can Verify this listing, premier this listing and put all focus on it as we can be confident no one else can "steal" the property from us. In this situation, especially, we would guarantee close within 4 weeks.

If a landlord gives us exclusively we can commit to them and spend money to sell their property nit just list it!



Property Listing Policy

1. PURPOSE

To create a clear visual process to allow staff to see property listings status to enable proper follow up

To create a process to enable properties to be listed as soon as possible

2. SCOPE

- a. This policy applies to all organisation's employees, management, brokers, admin, PM's
- b. This policy describes the organisation's objectives and policies regarding timeline and process for listing properties to ensure on time "live" properties.

3. REFERENCES

- a. Property listing format
- b. CRM Property Policy
- c. CRM Property LISTING Policy
- d. Listing Portal Format
- e. Property Survey Form

4. DEFINITIONS

Term:  Draft

Definition: A property that has been identified for sale or rent and has been passed to Sales Director.

Term:  Waiting Approval

Definition: A property that has met all criteria and can now go live to "published" by Sales Director

Term:  Published

Definition: A property that is live in CRM and across all property portals

Term:  Un-Published

Definition: A property that is no longer live and has been sold, rented, etc and no longer available

Term: Archived

Definition: A property that is no longer live and has been sold, rented, etc and no longer available and has been removed from the active system



5. RESPONSIBILITIES

- a. Management
 - 1) Establish Process
 - 2) Enforce Policy
 - 3) Provide training for work force on this policy and referenced procedures
 - 4) Enforce sanctions
 - 5) Designate actions and roles
- b. Employee responsibilities
 - 1) Understand and comply with organisation's policies regarding PROPERTY LISTING
 - 2) Ensure all related and referenced procedures and policy are understood and followed

6. WORK FORCE TRAINING

- a. Sales Director will offer training on this policy every morning as required for all staff and as requested ongoing. Staff need to ask the question if they are unsure and they will be trained accordingly.
 - 1) **New staff member training:** Sales Director; CRM Propspace Thursday afternoon
 - 2) **Recurrent training:** Sales Director; Updates on all Procedures and Policy with Q & A at all meetings.
 - 3) **Special function training:** MD, Sales Director; As requested and qualified by staff

7. EMPLOYEE FEEDBACK

- a. If a member of staff feels they are not learning effectively enough the procedure and policy set out regarding Property LISTING or any other procedure and policy ask MD for further help and training

8. SANCTIONS

- b. All employees must understand and adhere to this policy to enable target driven environment to be fully operational and achievable. After training Failure to adhere will result in:-
 - I. Initial loss of 5% of commissions
 - II. Loss of access to CRM and Property Listings support from company



Property Listing Procedure

1. STATUS OF LISTINGS

Draft

Definition: A property that has been identified for sale or rent and has been passed to Sales Director.

- I. The purpose of the draft listing is to identify properties on our system that are upcoming and available for rent or sale. Only the basic required details needed here. The person inputting should put basic details and fill out the property survey form with same details and property reference number generated when draft listing is raised
- II. If the draft is raised by PM dept they must handover top copy of property survey form to MD and second copy to sales director. He will then assign property to appropriate agent. The PM dept must have their own property survey book and copies of all properties given to MD and sales dept for purpose of their commission.
- III. If the sales director enters draft he must then assign to agent and give MD top copy of the property survey form and agent second copy. He will retain third copy.
- IV. From draft to awaiting approval must be 2 days maximum.

Waiting Approval

Definition: A property that has met all criteria and can now go live to “published” by Sales Director

- I. When the agent has completed listing and it is ready to go live he will change listing status to awaiting approval and submit the completed property survey form back to sales director. He will change states to published and put second copy in live properties file.
- II. The landlord or seller must be entered as a CONTACT and a LEAD.

Published

Definition: A property that is live in CRM and across all property portals

- I. The sales director will authorise publication of all live listings. These can only go live after permit process has been completed.
- II. Listings can only go live if the correct paperwork is in place to VERIFY property. Title Deed, passport(s) and NOC or form A.

Un-Published

Definition: A property that is no longer live and has been sold, rented, etc and no longer available

- I. When a property is rented or sold or is no longer available the property should be unpublished immediately by the sales director.
- II. To unpublished you must follow these steps overtime;
 - III. Edit listing



- IV. Additional info - property status change to rented or sold depending on sales or rental property
- V. If property featured change to NO
- VI. Set NEXT AVAILABLE date to exact expiry date on tenancy contract (if any)
- VII. Set REMIND to ONE MONTH (an email will be sent to PM to remind us next year of property availability)
- VIII. Save listing and it will automatically set status to “UN-PUBLISH”
- IX. UN-PUBLISHED properties must be moved to ARCHIVED immediately

Archived

Definition: A property that is no longer live and has been sold, rented, etc and no longer available and has been removed from the active system

- I. Archived properties are there primarily as a means of recording past properties and landlords.

Summary

If adhered to the property visibility will enable us all to see stages and process from property found to property live.

Are foreigners restricted on purchasing in Dubai?

No, anyone can purchase property in Dubai across all designated freehold and leasehold developments either primary sales directly from the developers or in the secondary resale market.

Leasehold or Freehold?

Freehold properties are most commonly available when buying through Abode Property Real Estate. This is when you own the structure and land in perpetuity. However you might occasionally find a property for sale in a leasehold development [areas of Dubai] which implies that a third party has an interest in the property, usually the land. Leasehold contracts are normally renewable after 99 years.

Can I purchase a property more cheaper directly from the developer?

Often it is quite the opposite where properties available in the resale market are cheaper than if you were to purchase directly from a developer. Make sure you deal with a reputed and registered brokerage firm like Abode Property Real Estate and make sure you are aware of your financial commitment and the structure of the sale before you buy. Minimum selling prices are often set by developers however individual sellers can transfer ownership and conclude on a sale at any reasonable & agreed sale price.

How do mortgages work?

Abode Property Real Estate partners with preferred mortgage brokers who will guide you through the complete process and advise you on which lender or terms will suit your individual requirements and investment. Competitive rates and terms are available and linked to other more mature markets. Contact us today for free assessment and qualifying information

What payments are required?

The standard minimum deposit is 10% of the purchase price, payable on signing the contract of sale. On secondary resale's the balance payment is made on transfer of the ownership and dependent on the terms of the contract but usually 30 - 45 days later. On [off plan] primary sales there are staged payments made at regular intervals to the developers through to completion. Managers cheques are a must to ensure effective transfer.

How long is the purchase process?

In general, due to our complete service and professional partners, purchases are extremely swift especially when there are no mortgagors involved. Completion of a sale and transfer of ownership can be completed in as little as 2 weeks

What happens if the property I purchase is already tenanted?

As the new owner you inherit the tenant and the terms and conditions of the tenancy agreement. A prorated rent back figure can be calculated as part of the contract of sale and ensure that all future rental cheques are changed to your name as the new owner. The security deposit paid by the tenant to the landlord (Seller) at lease commencement also needs to be transferred to the new property owner whom will take over as the Landlord.

Do I need to be in Dubai to complete my purchase?

If you are not able to be in Dubai then a Power of Attorney (POA) can be used to buy property on your behalf. This can be anybody nominated by yourself holding a specific POA which has been accredited both in the UAE Embassy located in the country where

the delegation has been issued and again in the ministry of foreign affairs in the UAE. To arrange a POA from Dubai the process is quicker and more cost effective but you have to be present in person in Dubai. Abode Property will guide you through this process when purchasing through our company.

Are there service charges?

Reasonable service charges are payable to all developers/ home owners associations for maintenance, landscaping and refuse collection. This charge varies according to the development and is normally calculated on the built up area of your home. This is the size of your apartment as stated on the title deed.

Are there any other costs I need to consider & what taxes must be paid?

When buying on the resale market there will be a real estate agency commission that is paid to the broker handling your transaction and this is normally 3% of the purchase price or is charged as a minimal fixed amount. As a buyer you will also pay a transfer of ownership fee to the Dubai Land Department (DLD) which is 4% of the purchase price. There is a set fee of AED 4000 payable to the Transfer Office that completes the formalities of the transfer.

Currently, there are no government taxes of any kind when purchasing a property in Dubai. If your property is mortgaged you will expect to pay a further 0.25% of the value of the loan as mortgage registration.

Does ownership entitle you to residency?

The Dubai Government will issue 2 year renewable residence visa to property owners subject to conditions. For completed properties purchased over and above a value of AED 1,000,000 you can apply. The Property owner can sponsor additional family members including maid/driver. This residence visa does not permit you to work in Dubai. See www.dnrd.ae or www.amer.ae or contact davideddy@emiratesconveyancing.com for assistance with application.

What is the investment potential of Dubai property?

Abode Property Real Estate have the inside market knowledge to know which developments project the most substantial gains. Investors in Dubai enjoy high capital growth and rental yields of anywhere between 6-12% and together with the tax-free regime, makes Dubai a highly sought after property location. With Government initiatives and regulations to secure & protect the real estate industry along with the geographical position of the U.A.E attracting international investors Dubai is a city that can realize the dream.

Why?

Only use THESE is Sub Status

Open

In Progress - means you are active with the client and working with them now

Follow Up - Means you can reach the lead (called no reply) or you have to contact in future

Offer Made - If a client makes an offer acceptable to Landlord and provides deposit

Viewing Arranged - When you have arranged viewing and have set calendar appointment. After viewing update to correct status according to above

Closed

Successful - Deposit Taken Deal Done

Unsuccessful - No deposit No deal

The following outlines the correct process that allows maximum exposure from a lead and how to enter lead and follow up with correct marketing and procedures.

Leads MUST be updated fully and properly within 2hrs of lead enquiry or if enquiry is late in evening 30 minutes after working day begins.

What is updated?

1. Status change in lead from "Not Yet Contacted (NYC)" to one of above status **ONLY**
2. **AND notes** in the system to reflect the change of status

Both of these are imperative to assure contact has been made

If this process hasn't been followed lead will be re-assigned by MD/SD to ensure agent and company has maximum exposure.

*In event you can't access CRM for some reason simply put Lead Name | **Lead Number** | Note on company group whatsapp*



Auto Lead

If lead is loaded automatically from property portal it will show a blue arrow. The broker will be alerted to new lead with an automated SMS with lead details. The following must be adhered to...

1. **EDIT** lead and expand "Property Requirements" to "Property 2" (3 & 4). This should be a broad criteria based on initial enquiry in "Property 1" box. For example if someone enquires on a 1 bedroom apartment in Al Majara Dubai Marina at AED120,000/-Broaden the search to 1 bedroom apartment in Dubai Marina at AED125,000/-. After this Save Lead do property match.
2. **EMAIL** by Clicking this button and choose all properties you wish to send to lead. The lead will then receive an email will links to view your selected properties.
3. **SEND SMS** to lead with your details. Also send yourself an SMS so you have the leads details in your in box.
4. **CALL** lead. If details are missing from auto lead get all details and UPDATE CRM!!!

A. Full name

B. Email Address

These are imperative for future contact campaigns

C. Mobile Number

D. Source of Lead

If the auto lead doesn't have full details or wrong number. CHECK lead email from source and correct if you can. If some details are missing ask the lead when you speak with them and update

Manual Lead Enter

The exact same process should be followed above with ALL details being entered.

If a contact exists in CRM choose contact then add lead.

If NO contact exists then it must be added first then lead added against contact.

Qualifying a lead

A. Maximum Budget

- a) If rental ask maximum cheques?
- b) if buyer are they cash or mortgage AND if mortgage are they pre qualified?

B. Move in date

- a) Set Priority to Normal, Low, High or Urgent depending on move in date. Normal would be within next 7 days.
- b) If longer than 3 weeks do not view. Set reminder to "follow up"

C. Visa Status

- a) VISA MUST be at very least applied for with supporting docs and application forms.
- b) If not do not view. Set reminder to "follow up"

D. Decision Maker

- a) Make sure the decision maker will be on first viewing. Qualify by asking questions like Will you be in a position to deposit today? Is it for you only? etc.

E. Property Details

- a) Find out about whats important to lead...
- b) Do you like high floor or low floor?
- c) Is view important? Yes the ask - Marina or sea or ?
- d) Do you need a balcony?

Tell them about the properties you are offering, Positive and negative

- Amazing view / Looks over main road
- Panoramic windows / Small windows
- Spacious rooms / Small bedrooms but large lounge
- Low floor looking over main road / high floor full sea view
- Etc.

VIEWINGS should be added only in the "**main calendar**". This records property and lead and puts in diary. You can also SYNC this with your phone.

Viewing status should be marked as follows

- **Scheduled** when you have a planned viewing
- **Cancelled** if lead cancels viewing

- **Successful** if lead deposits on property
- **Unsuccessful** if lead does not deposit on property

Leads Status / Sub Status

The most **important** part of the leads is the status. This helps you follow the flow of the lead and determine what is hot and what is not.

A lead should be closed successfully or unsuccessfully as **quickly as possible** to help you manage your lead portfolio.

If the lead is a stuck opportunity (AS STATUS ABOVE) then put in a calendar reminder and leave open. Otherwise qualify the lead to closed. Closed can be deposit taken or not proceeding. Either way it lets you focus on income stream leads.

Open leads should be your pipeline of **HOT** leads.

Work out **how many deals** you need to hit your target and focus on qualify that amount and focus.



Deposits and Banking

Deposits

1. Holding deposit to be taken in name of Abode Property
 - (i) 5% plus vat or AED5,000/- plus VAT whichever it is.
 - (ii) If either Landlord or Tenant has problem with this at point of application we must take Holding deposit 5% in LL name AND commission PLUS VAT (5% OR 5000) in Abode Property name.
2. At point of contract signing and cheque handover assuming point 1 followed above then security deposit and rent payments at this stage to be made in LL name.

Client Money

- ALL client money from today must be made in name of client or client POA with NO client cheques being taken in Abode name or deposited in Abode Account.

If anyone in the deal process has any problems with this discuss with me don't just accept in Abode Name.

This has serious implications for Abode Property so no exceptions or mistakes accepted.

Mark Tolland

MD



TimeKeeping and Dress Code Policy

1. PURPOSE

To create a clear process for all staff with regard to contractual timekeeping and dress code

To create a professional vision to all our clients to align our brand image and transparency

2. SCOPE

- a. This policy applies to all organisation's employees, management, brokers, admin, PM's
- b. This policy describes the organisation's objectives and policies regarding image branding and perceptions along with onetime objectives and contractual obligations.

3. REFERENCES

- a. MOL Contract
- b. Job Offer

4. DEFINITIONS

Term: Dress Code

Definition: Staff attire policy for all

Term: Timekeeping

Definition: Hours of work and calendar appointments.

Term: Image and Branding

Definition: Perception and vision of Abode to our client base

5. RESPONSIBILITIES

- a. Management / Department Heads
 - 1) Establish Process
 - 2) Enforce Policy
 - 3) Provide training for work force on this policy and referenced procedures
 - 4) Enforce sanctions
- b. Employee responsibilities
 - 1) Understand and comply with organisation's policies regarding dress code and timekeeping.
 - 2) Ensure all related and referenced procedures and policy are understood and followed

6. WORK FORCE

- a. Managing Director will fund all staff attire in current premises to defined and agreed budget.
- b. Abode are currently sourcing attire and branding for all employees to be introduced soon.



TimeKeeping and Dress code Procedure

1. Timekeeping

Definition: Hours of work and calendar appointments

- I. All staff must conform to hours of work as laid out in MOL contract or offer letter or any other superseding information. Current office hours are;
 - I.I. Saturday to Thursday
 - I.II. 8.30AM TO 5.30PM
 - I.III. From time to time the company will amend working hours and inform staff if any temporary change in advance. Staff should always attend during hours noted in point 1.1 and 1.11 unless otherwise informed on company whatsapp by MD or Senior Manager.
 - I.IV. All appointments for **all employees** WITHOUT exception must be in your company calendar.

Dress Code

Definition: Staff attire policy for all

- I. All working hours and all working days staff must dress appropriately and in line with policy and branding. We are a customer facing company and must be prepared for this at all times without exception.
- II. Suit or Dress (ladies) at all times. Dress must be (at least) knee length and partially cover arms.
- III. At no times may employees wear jeans, training shoes, sweat clothes, shorts, gym clothes, mini dresses or any casual attire not in fitting with a professional appearance.
- IV. At all times all employees must look clean, tidy, fresh and professional.

Summary

As a professional company we need to make sure we service our core customer in the hours they require us to attend to them.

Furthermore we must present our brand at all times so our client base know we are serious and respectful of their custom to us.

You are representing Abode and yourself. Be early, be prepared and be professional in appearance and manner.