



RDC Roundtable
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Sales Associates Training Outline

A. Eligibility Criteria for Relocation Specialists

B. Relocation Specialists Training – discussion points

1. Mandatory?
2. Training fee: to charge or not to charge?
3. Re-certification training class every year
4. Agent Profile/Bio
5. Database of Relo agents – categories
6. Selecting dedicated team of agents for clients
7. “Requested” agents who are not on the relocation team
8. Referral Fee: Do you up charge the referral fee to the agents?
9. Referral Policy and Procedures
 - a. Do you involve your managers in referral assignments?

C. Relocation Training Syllabus

I. Relocation – Overview

- Sources of Relocation Referrals
- Key Players in the Relocation Process
- Role of the Relocation Department

II. Expectations of the Relocation Specialist

- Eligibility
- Do's and Don'ts
- Accountability and Commitment

III. Referral Process

- Listing Opportunities
- Buyer Referrals
- E-mail Confirmations
- Referral Agreement
- Agent's Responsibility & Expectations
- Closing Process

IV. ERC – BMA

- How to fill out a BMA

V. Homesale Programs

- Buyer Value Option (BVO)
- Appraised Value Option
- Amended Value Option
- 11 Elements of Compliance

VI. Referral Fee Policy

- Incoming referrals
- In-house referrals
- Outgoing referrals
- Requested agent

VII. Inventory Properties

VIII. Internet Lead Management

- Internet Lead Management (Client Services)
- Lead Routing Rules
- Internet Response Team (IRT)

IX. Relocation Marketing Materials

X. Agent Profiles/Bio and Relocation Specialist Agreement

XI. Test