



# REA 101 COURSE CURRICULUM CHECKLIST

REA 101: The Essential Guide for  
New Real Estate Assistants in Their First 90 Days on the Job

[www.KathleenMetcalf.com/Training](http://www.KathleenMetcalf.com/Training)

# REA 101 COURSE CURRICULUM CHECKLIST

## REA 101 Welcome Kit

### Welcome Kit Summary:

In this Welcome Kit, you'll learn how to navigate the REA 101 site to access downloads and the Discussion Forum. You'll also get insight into the motivation behind the creation of this program and hear tips for how to best go through REA 101 from its creator. Lastly, you'll be introduced to your talented instructors.

### Videos:

- REA 101 Site Tour
- Welcome from Kathleen Metcalf

### Downloads:

- REA 101 Course Curriculum Checklist

## Module 1: Real Life Working in a Real Estate Office

### Module 1 Summary:

In this module, we explain what working in a Real Estate office is really like. The lessons not only clearly lay out the office dynamics and work flow for you, but we also tell you exactly what specific traits and skills you need to acquire in order to be amazing at your job. After completing the module, you will have the foundation of knowledge you need to start your successful career as a Real Estate Administrative Professional!



### Videos:

- Quick Sketch: Introduction to Real Estate
- Lesson 1: Real Estate Offices 101 – Part 1
- Lesson 1: Real Estate Offices 101 – Part 2
- Lesson 2: Key Traits and Skills of Outstanding Assistants
- Lesson 3: The Business Circle

### Quiz:

- Module 1 Quiz

### Downloads:

- Module 1 Worksheet
- Business Circle
- Transcript: Quick Sketch: Introduction to Real Estate
- Transcript: Lesson 1: Real Estate Offices 101 – Part 1
- Transcript: Lesson 1: Real Estate Offices 101 – Part 2
- Transcript: Lesson 2: Key Traits and Skills of Outstanding Assistants
- Transcript: Lesson 3: The Business Circle

## Module 2: Time Management for Real Estate

### Module 2 Summary:

This module offers time management strategies that are tailored to the specific needs of real estate administrative professionals in order to help you make the most efficient use of your time. You will learn how to design an effective daily schedule as well as techniques for staying on track with that schedule, including how to overcome procrastination when you get stuck. You will also learn ways that you can save time in your workday, and finally, how you can use technology to better manage your time. Ultimately, after completing this module, you will have the tools you need to get the most done in the least amount of time!



### Videos:

- Quick Sketch: Importance of Time Management
- Lesson 1: A Step-by-Step Guide to Designing an Effective Schedule
- Lesson 2: Tips for Sticking to your Schedule
- Lesson 3: Time-Saving Strategies
- Lesson 4: Help from Technology

### Quiz:

- Module 2 Quiz

### Downloads:

- Module 2 Worksheet
- Sample Schedule for Agents First 90 Days with New Hire & Template
- Sample Schedule for New Assistants in First 90 Days & Template
- Transcript: Quick Sketch: Importance of Time Management
- Transcript: Lesson 1: A Step-by-Step Guide to Designing an Effective Schedule
- Transcript: Lesson 2: Tips for Sticking to your Schedule
- Transcript: Lesson 3: Time-Saving Strategies
- Transcript: Lesson 4: Help from Technology

## Module 3: Building Client Loyalty

### Module 3 Summary:

In this module, we provide practical advice on how to offer exceptional customer service to your clients. Many of our suggestions are drawn from well-known business resources that we have adapted to the real estate industry.



In the lessons, you learn how to meet and exceed your clients' expectations and how to smoothly handle any problems that may arise during the transaction. We also cover how to request and receive client reviews as well as ways to maintain contact with your clients long after the closing. Finally, we explain different methods of keeping track of your correspondence with clients and will provide templates for effective communication. By the end of this module, you will be prepared to help your Agent create raving fans of your business!

#### Videos:

- Quick Sketch: Importance of Client Loyalty
- Lesson 1: 7 Keys to Building Client Loyalty
- Lesson 2: Methods for Improving Client Communication

#### Quiz:

- Module 3 Quiz

#### Downloads:

- Module 3 Worksheet
- Recommended Reading List
- Sample Offer Accepted Letter & Template
- Sample Seller Preparing for Closing Letter & Template
- Sample January Closing Statement Letter & Template
- Phone Script: Sample Client Wants to Talk with Agent
- Phone Script: Sample Calling Clients to Update Database
- Sample New Listing Letter from Assistant to Client & Template
- Sample Buyer Accepted Offer Letter & Template
- Transcript: Quick Sketch: Importance of Client Loyalty
- Transcript: Lesson 1: 7 Keys to Building Client Loyalty
- Transcript: Lesson 2: Methods for Improving Client Communication



## Module 4: Effective Team Dynamics

### Module 4 Summary:

In this module, Kathleen shares some of the successful strategies she has developed as a real estate team coach and lays out steps you can take in order to improve your own team dynamics. The lessons provide specific ways to build trust, improve communication, and avoid conflict. After completing this module, you will have the tools your team needs to work productively and achieve excellent results together!

### Videos:

- Quick Sketch: Importance of Effective Team Dynamics
- Lesson 1: 3 Keys to Establishing Clear Expectations
- Lesson 2: 3 Keys to Ensuring Accountability
- Lesson 3: 3 Keys to Proactive Team Communication

### Quiz:

- Module 4 Quiz

### Downloads:

- Module 4 Worksheet
- 3 Phases of a New Assistant
- Sample Performance Review & Template
- Sample Self-Evaluation Worksheet & Template
- Sample Job Descriptions & Templates
- Sample Team Meeting Agenda
- Transcript: Quick Sketch: Importance of Effective Team Dynamics
- Transcript: Lesson 1: 3 Keys to Establishing Clear Expectations



- Transcript: Lesson 2: 3 Keys to Ensuring Accountability
- Transcript: Lesson 3: 3 Keys to Proactive Team Communication

## Module 5: Risk Management

### Module 5 Summary:

This module explains the main legal guidelines governing the real estate industry and how they impact you as a real estate administrative professional. The lessons cover the ethical and legal obligations Agents have to their clients, the provisions of the Fair Housing Act, and the rules regulating the use of the term REALTOR®. It also provides an overview of the types of contracts and other legal documents involved in transactions. Lastly, we discuss the duties that unlicensed assistants are and are not allowed to perform. After completing this module, you will have a solid understanding of how to respect the legal restrictions involved in the real estate industry and thus how to minimize risk for your Agent's business!

### Videos:

- Quick Sketch: Importance of Risk Management
- Lesson 1: The Six Fiduciary Duties
- Lesson 2: The Fair Housing Act
- Lesson 3: The Term REALTOR®
- Lesson 4: Legal Documents for Real Estate
- Lesson 5: Licensed vs. Unlicensed Assistants

### Quiz:

- Module 5 Quiz



### Downloads:

- Module 5 Worksheet
- Transcript: Quick Sketch: Importance of Risk Management
- Transcript: Lesson 1: The Six Fiduciary Duties
- Transcript: Lesson 2: The Fair Housing Act
- Transcript: Lesson 3: The Term REALTOR®
- Transcript: Lesson 4: Legal Documents for Real Estate
- Transcript: Lesson 5: Licensed vs. Unlicensed Assistants

## Module 6: Marketing an Agent's Brand Part 1: Branding and Direct Marketing

### Module 6 Summary:

As a real estate administrative professional, you may be asked at some point to assist your Agent in developing and marketing their brand. In this module, we give you the foundation of knowledge necessary to be able to help create a dynamic brand and to promote that brand through compelling marketing materials. We explain the main components of a brand and reveal the keys to good branding. The lessons also introduce you to the essentials of direct marketing: whom Agents market to and what types of marketing materials they send. Finally, we provide you with outlines of some direct mail campaigns. After completing the module, you will understand the fundamentals of branding and marketing, which will help get you through your first 90 days on the job.

### Videos:

- Quick Sketch: Importance of Branding and Direct Marketing
- Lesson 1: Branding 101



- Lesson 2: Direct Marketing 101

Quiz:

- Module 6 Quiz

Downloads:

- Module 6 Worksheet
- Transcript: Quick Sketch: Importance of Branding and Direct Marketing
- Transcript: Lesson 1: Branding 101
- Transcript: Lesson 2: Direct Marketing 101

## Module 7: Marketing an Agent's Brand Part 2: Online Marketing Strategies

Module 7 Summary:

In this day and age, it is essential for every real estate Agent to have an online presence and it may be your task as a real estate administrative professional to manage this presence. This module introduces you to the key components of an effective online marketing strategy. We explain how to create a website that promotes your Agent and successfully converts visitors into potential clients. The videos also discuss how to follow up with these leads through an email campaign. Finally, we cover how to make the most of social media platforms. By the end of the module, you will understand how to help your Agent get the best possible exposure through online marketing.



### Videos:

- Quick Sketch: Importance of Online Marketing
- Lesson 1: Keys to Creating a Successful Website
- Lesson 2: Keys to Maximizing the Benefits of Social Media
- Lesson 3: Guide to Email Follow-up Campaigns

### Quiz:

- Module 7 Quiz

### Downloads:

- Module 7 Worksheet
- Transcript: Quick Sketch: Importance of Online Marketing
- Transcript: Lesson 1: Keys to Creating a Successful Website
- Transcript: Lesson 2: Keys to Maximizing the Benefits of Social Media
- Transcript: Lesson 3: Guide to Email Follow-up Campaigns

## Module 8: Lead Generation and Management

### Module 8 Summary:

In this module, we show you how branding and marketing fit into the overall process of lead generation and explain how to manage the leads once they have been created. Lead management entails identifying and categorizing leads and contacting them appropriately. The goal, of course, is to turn them into clients. Having an effective method for lead management in place is essential for the success of your Agent's business and therefore for your success as well!



### Videos:

- Quick Sketch: Importance of Lead Generation & Management
- Lesson 1: How to Get New Leads
- Lesson 2: How to Process Leads
- Lesson 3: How to Follow up on Leads

### Quiz:

- Module 8 Quiz

### Downloads:

- Module 8 Worksheet
- Transcript: Quick Sketch: Importance of Lead Generation & Management
- Transcript: Lesson 1: How to Get New Leads
- Transcript: Lesson 2: How to Process Leads
- Transcript: Lesson 3: How to Follow up on Leads

## Module 9: Listing a Property Part 1: Pre-Listing and Marketing a Property

### Module 9 Summary:

This module covers the necessary steps you will likely need to take in order to move from securing a listing to marketing the property. Winning a listing is a competitive process. You can help your Agent stand out from the crowd of potential listing Agents by ensuring he or she has accurate information about the property and is well organized when meeting with the seller. By the end of the module, you will be prepared to help your Agent get ready for a successful listing appointment and develop a wide variety of effective marketing tools for the properties that he or she lists.



### Videos:

- Quick Sketch: Listings 101
- Lesson 1: The Pre-Listing Phase
- Lesson 2: Marketing the Property

### Quiz:

- Module 9 Quiz

### Downloads:

- Module 9 Worksheet
- Sample Listing Appointment Checklist & Template
- Transcript: Quick Sketch: Listings 101
- Transcript: Lesson 1: The Pre-Listing Phase
- Transcript: Lesson 2: Marketing the Property

## Module 10: Listing a Property Part 2: Listing Coordination and Buyer's Perspective

### Module 10 Summary:

In this module, we explain how to successfully coordinate the specific steps and timelines involved in listing a property. This process requires you to handle many details at once, so we give you strategies for keeping everything organized, meeting deadlines, and managing expectations. We then switch gears and provide tips for how to assist your Agent if he or she is representing a buyer in the process. We will cover how to best prepare the Agent for showing listings to potential buyers. By the end of the module, you will have the tools you need to help your Agent quickly and successfully move from securing a listing to an accepted offer.



### Videos:

- Quick Sketch: Listing Coordination 101
- Lesson 1: Coordinating a Listing – Part 1
- Lesson 1: Coordinating a Listing – Part 2
- Lesson 2: Buyer's Perspective

### Quiz:

- Module 10 Quiz

### Downloads:

- Module 10 Worksheet
- Sample Agent to Host Open House Checklist & Template
- Sample Listing Checklist & Template
- Transcript: Quick Sketch: Listing Coordination 101
- Transcript: Lesson 1: Coordinating a Listing – Part 1
- Transcript: Lesson 1: Coordinating a Listing – Part 2
- Transcript: Lesson 2: Buyer's Perspective

## Module 11: Pending to Closing Part 1: Seller Side

### Module 11 Summary:

This module introduces you to the steps that must be completed in order to move from contract to close. It focuses on what to do when representing the seller in the transaction and we share strategies for managing the process more effectively and efficiently. Finally, we cover how to translate a successful close into loyal customers and referrals. We know it takes a long time to learn the pending to closing process and even longer to know it well enough to be able to lead people through it. But this module gives you the essential information you need know in order to begin your journey toward this goal!



### Videos:

- Quick Sketch: From Pending to Closing Successfully
- Lesson 1: Keys to Successfully Coordinating a Transaction
- Lesson 2: Overview of the Process: Seller Side
- Lesson 3: Post-Closing: Keys to Ensuring Customer Loyalty and Referrals

### Quiz:

- Module 11 Quiz

### Downloads:

- Module 11 Worksheet
- Sample Transaction Contact Information Sheet & Template
- Sample Closing Checklist & Template
- Sample Post-Closing Client Feedback Survey: Seller Transaction & Template
- Sample Pending to Close Flow Chart
- Transcript: Quick Sketch: From Pending to Closing Successfully
- Transcript: Lesson 1: Keys to Successfully Coordinating a Transaction
- Transcript: Lesson 2: Overview of the Process: Seller Side
- Transcript: Lesson 3: Post-Closing: Keys to Ensuring Customer Loyalty and Referrals

## Module 12: Pending to Closing Part 2: Buyer Side



### Module 12 Summary:

This module provides additional information on how to help move a transaction along the process from contract to close and focuses on what to do when representing the buyer in the transaction. While your Agent will likely handle many of the steps, it's good for you to know the process because you may be able to participate in informing and preparing a client for what's coming next in the transaction. It is particularly good to be aware of the times when a deal can go off the rails; this is helpful information for the buyer, as clients don't like surprises when buying a home!

### Videos:

- Quick Sketch: Successfully Moving Buyers from Pending to Closing
- Lesson 1: Overview of the Process: Buyer Side - Part 1
- Lesson 1: Overview of the Process: Buyer Side - Part 2
- Lesson 2: Documents in the Process

### Quiz:

- Module 12 Quiz

### Downloads:

- Module 12 Worksheet
- Sample Post-Closing Client Feedback Survey: Buyer Transaction & Template
- Transcript: Quick Sketch: Successfully Moving Buyers from Pending to Closing
- Transcript: Lesson 1: Overview of the Process: Buyer Side - Part 1
- Transcript: Lesson 1: Overview of the Process: Buyer Side - Part 2
- Transcript: Lesson 2: Documents in the Process



## AGENT BONUS MODULE

# The Keep Calm Guide: Confident Communication with your Assistant for Successful Team Building Results

### Agent Bonus Module Summary:

In this bonus module, designed specifically for Agents, Kathleen shares the principles that she guides her private coaching clients and their teams through for greater team success and retention of talented staff. The tips you learn in this module will help to build trust, improve communication, and avoid conflict, whether you have a new assistant or an existing team. After completing this bonus module, you'll have the tools your team needs to work productively and achieve excellent results together!

### Videos:

- The Keep Calm Guide: Confident Communication with your Assistant for Successful Team Building Results

### Downloads:

- Agent Bonus Module Worksheet
- 3 Phases of a New Assistant
- Sample 90 Day Training and Goal Setting Worksheet & Template
- Transcript: The Keep Calm Guide: Confident Communication with your Assistant for Successful Team Building Results

