Real Estate Playbook Checklist

Getting Started

- ☐ Have your State Manager brief you on the Real Estate Office introduction process, managing expectations, establishing connections and an overview of Real Estate Language
- ☐ Obtain your Territory's Real Estate Office Contact List
- ☐ Book and attend initial introduction meetings with all of your Real Estate Partners in your Territory
    - ☐ Attend with or without your State Manager and meet with the Principal and/or Office Director/s
    - ☐ Establish a connection *(This could take time!)*
        - If connection made, initiate RE playbook discussions *(See microsite & below)*
        - If connection not quite there, work with your State Manager to keep at it
- ☐ Book/Schedule your next visit
- ☐ Add all staff to a communications schedule to keep in touch with the office *(See example schedule template)*
  **Your State Manager can work with you to customise a communication and Office Visit plan based on the initial visit*

Office Integration

Once you have established a connection with the Principal:

- ☐ Website | Team Integration: Discuss and seek permission to be added to the team page *(get approval in writing)*
- ☐ Team Meet & Greet: Agree a time where you can meet the whole team and provide a quick intro to yourself and provide Morning Tea or Afternoon Tea.
- ☐ Regular Office Visits: Confirm with the Principal a regular visitation plan and adding value at the weekly Sales & Property Management Meetings
    - Adding possible leaderboards/competitions for referrals from the team
- ☐ Front Office Displays: Agree to have materials displayed in the office and what mediums are preferred
    - Office Displays assist with being visual regularly to the team and customers *(Electronic displays, window display cards, banners, flags, team photos, brochures, business cards)*
- ☐ Staff Information 'Catch-ups': Establish a monthly/quarterly 'Lunch & Learn' with the staff where you can discuss financial insights and guidance for their personal needs.
    - Tips on how they can evaluate their own finances
    - The opportunity to have a private consultation and tailored finance plan
    - Highlight our 5-Star Special available to only LJ Hooker employees
- ☐ Agree to add value to Real Estate Customers and commence customer communications *(Once agreed, refer to microsite & below)*

Customer Communications

- ☐ Review RE Playbook Resources Hub
- ☐ Submit proposal to RE Office Principal, Sales or PIM Manager *(Template available)*

Sales

- Buyers
  - Integration into Office Newsletters (Banner, Feature Article or Full Newsletter)
  - Open Homes: Have an Open Homes Kit (See microsite) to attend in person or consider putting together an Office pack, for agents in a satchel, with everything they need
- Vendors
  - Consider adding material to the Listing Kits
  - Integration into Office Newsletters (Banner, Feature Article or Full Newsletter)

Property Management

- Landlords
  - Consider adding material to new landlords pack
  - Integration into Office Newsletters (Banner, Feature Article or Full Newsletter)
- Tenants
  - Integration into Office Newsletters (Banner, Feature Article or Full Newsletter)

- ☐ Agree on Communications Plan
- ☐ Confirm with Office what requirements are needed for distribution *(Flyers, Open Home Kits or Newsletter Imagery/text - see Office Newsletter Template)*
- ☐ With Franchise Support Team assistance, collate content any creatives for execution
- ☐ Diarise to follow-up and/or provide feedback to Office around responses from customers, to replenish any materials or to provide monthly/quarterly content

---

Other Customer Engagement

- ☐ Community Events: Liaise with the office on any office events, sausage sizzles, Auction events or charity drives where you can participate and/or support
- ☐ Dual Branded | Joint Marketing Initiatives: Are there any opportunities for you to engage in joint marketing and share the cost and promote your brand along side the Real Estate Office?
- ☐ Social Media Cross-contamination, Collaborative Campaigns, Podcast | Video Update Interview or Q&A's: Where can you add value to the Office with your finance expertise and/or share the Real Estate content online? (And vice versa, share with the Real Estate team content they can share to promote you)
- ☐ Suggest a Finance | Real Estate Education night: Have sales and property management present for views on buying and renting as well as a home loans & finances presentation on market insights, first time home loans, what lenders are looking for, investment loan insights etc.
  - Consider including a question sheet on Borrower Capacity which you can use to assess and contacted the customers the next day