



# Module 1

Welcome |

# \*\*\*First Things First\*\*\*

## Module 1 – Priorities

1. You will receive a welcome email from the Weichert Cornerstone Support Team with your log in credentials. All Weichert systems can be accessed through my.weichert.com, with SINGLE SIGN on credentials. If you can't find the email, contact Support at [support@weichertcr.com](mailto:support@weichertcr.com).
2. Register for Fast Track as soon as possible. Ask your manager/mentor for the next available date or find it here: [Weichert® Fast Track Training](#)

## Welcome to Weichert, Realtors – Cornerstone

We are pleased and excited that you have chosen our team at Weichert, Realtors®-Cornerstone. We hope that one of the reasons you joined Weichert is because you learned about our strong commitment to the training of our Associates to ensure profitability and success.

You are in a unique position of opening a business within a business. We are here to help and guide you, but ultimately your success is up to you.

If you are waiting for your license, there are activities and trainings in which you may participate, to acclimate yourself to real estate and familiarize you with some of the Weichert tools. Until you are a licensed real estate professional, you CANNOT participate in prospecting or sales activities, but we hope you will spend your time on the activities listed below, to build the foundation for your new real estate business.

### **Activities to begin while waiting for your license**

#### **Build a Sphere of Influence Database**

This list includes family, friends, former co-workers, and anyone else in your private, or previous, business life, NO MATTER where they live. Our business is based on referrals!

- Start with your personal email account and prepare a CSV file to import into *myWeichert* CRM, when you have access.
- Ask your manager/mentor to provide the following resources from Weichert University, ***myWeichert Resources*** to get you started:
- You will use this list to connect with your sphere of influence. Continue to build the contact record.
- Select a “farm” area and LEARN IT... schools, parks, transportation, etc.

- Familiarize yourself with Weichertcr.com.
  - Search for Weichert listings in your market area to learn the inventory,
  - Search for “Just Listed” properties from your office.
- Complete your Bio page in your *myWeichert* profile. Reference Module 2 in Onboarding Guide.
- Get a professional headshot and turn this into the office. See Module 2 in Onboarding Guide.
- Announce on your social media sites that you have joined Weichert, Realtors – Cornerstone
- Download the recommended business apps to your phone. See Module 2 in Onboarding Guide.
- Ask your Manager/Mentor for opportunities to shadow other agents at Open Houses.

We are serious about your training. Please work through these modules thoroughly and timely. These activities will make sure that you enjoy a smooth transition into our company.

Our team is here to help you. Remember to have some fun along the way and always feel free to ask our team questions.

Again, welcome aboard!



# Core Values

1. Demonstrating **Integrity** in all our dealings
2. Maintaining **Professional Standards** with clients and colleagues alike
3. Creating **Added Value**: “We Sell More Because We Do More”
4. Providing **Personal Service** through responsiveness and attention to detail: “We Do What We Say We’ll Do”
5. Building **Relationships For Life** through constant follow-up

Each Weichert® franchised office is independently owned and operated.

## How Weichert® Spells S.U.C.C.E.S.S.

- S**pend time on self improvement; attend sales meetings, call sessions, training and role play with a buddy.
- U**se our proven, 2-step process on every Listing Presentation. Always complete the *Getting to Know You* brochure on the first step and DOORS and the Price Trend Analysis on the second step.
- C**onduct a minimum of 2 Open Houses per month and display 8 directional signs per house.  
3 Open Houses each month for new Associates. Use our Open House App to capture attendee info and ensure they get automated follow-ups.
- C**all a minimum of 100 neighborhood homes weekly. A minimum of 200 calls for new Associates; use the Weichert Calling Dialogue & Follow Up Guide.
- E**nter a minimum of 4 new contacts into your myWeichert database weekly. Target 40 touches annually to each via calls, texts, social media, email, drip campaigns, direct mail and drop-ins.
- S**end out at least 250 direct mail pieces every month. Follow up with phone calls.
- S**ecure business by using our other exclusive Weichert resources.

1 Listing or Sale Per Associate, Per Month

# Ready to reach your goals?



## Agent Commitment Agreement

### First 90 Days

I understand that following the Weichert Realtors – Cornerstone introductory plan will assist me in having a successful future in real estate. I intend and agree to do the following:

1. Register and attend all Fast Track Sessions, beginning on: \_\_\_\_\_.
2. Meet with my mentor weekly, to receive guidance, training, assignments, and observation opportunities. First meeting scheduled for: \_\_\_\_\_.
3. Attend: Sales Meetings – **Day of the week/time**  
In-House Training – **Day of the week/time**  
MTS Training – <https://calendly.com/kdacanay-weichertcr>  
Wednesday Webinars – Wednesdays 1 PM EST  
One on ones with Mentor – **Day of the week/time**
4. Use the 2-step DOORS listing presentation system to include “Getting to Know You” brochure on the first step and the Doors presentation, Leave Behind, Property Business Cards and the Price Trend Analysis on the second visit.
5. Use the Buyer Consultation System when working with buyers, including “Getting to Know You and Your Next Home” brochure, Pledge of Service, and the Guide to the Process brochures.
6. Hold a minimum of 3 Open Houses per month, using a minimum of 8 directional signs and 2 balloons on each sign. Follow the Weichert Open House system, using the Open House Timeline and Open House Checklist.
7. Call a minimum of 200 contacts weekly. Use the Weichert Calling Dialogue and Follow Up Guide.
8. Complete the myWeichert Quick Start Classes. Enter a minimum of 4 new contacts into your data base weekly. Target 40 touches annually to each through calls, social media, emails, drip campaigns, direct mail, and drop-in visits.
9. Send out at least 250 direct mail pieces every month.
10. Get familiar with all the Weichert tools and resources on Weichert University.
11. Review Weichert Tools Section on myWeichert.
12. Select a geographic farm area. Develop a calendar and schedule of touches, (calls, emails, texts, visits)
13. Complete your annual business plan, using the Business Planning Tool Kit found on Weichert University.
14. Present a professional image in the marketplace. (Include Dress Code if applicable.)

Date: \_\_\_\_\_ Sales Associate Signature: \_\_\_\_\_

Date: \_\_\_\_\_ Broker/Manager Signature: \_\_\_\_\_

### Office Policies & Procedures

✓	Policy	Rules
	Fast Track	Fast Track is mandatory for new associates. The program consists of 9 sessions of comprehensive sales training. Cost is \$169.00. Register by visiting Weichert Events on the home page of Weichert University.
	Dress Code	Business Casual. Please, dress as if you are interviewing for a job with your clients...because you are!
	Wednesday Webinars	1-hour online training session, once per week. <b>Every Wednesday at 1 PM EST.</b> We will email you the schedule to these each month. When we do, register for each class at <a href="http://weichertevents.com">weichertevents.com</a> and <b>add to your Calendar.</b>
	Sales Meetings	Sales Meetings are mandatory. Occurs every other week – unless announced. <b>Add to your Calendar.</b>
	In Office Trainings	WR-Cornerstone will schedule various trainings with management and guest speakers. These meetings are mandatory as trainee schedule permits. Times and dates will be communicated via email or text message.
	Weekly Mentor 1:1	Growing your business takes time and diligence. It can and will be frustrating at times, we. We don't want you to go at this alone. Schedule a 1:1 with your Mentor each week as your schedule permits. It will be worth it for your business.
	MTS Training	Kickstart your marketing: Meet with the MTS regularly.
	SUCCESS Card	The minimal monthly activities for associates are itemized on the SUCCESS card. The SUCCESS card is included in the Resources Section for Module 1. Sales Associates are required to complete the minimum monthly activities.
	Office Events	Sales associates are expected to attend office/community events.



## Meet Your Coach

Mentor Name	Phone	Email	Date

[illegible]





## NEW SALES ASSOCIATE AGREEMENT

1. The Experienced Sales Associate and New Sales Associate fill out Section 1, Experienced Sales Associate/New Sales Associate Agreement upon establishment of the relationship.

2. All parties should sign and give the original to the Broker or Manager. Upon new Sales Associate's first and second transaction, the Experienced Sales Associate should:

- Obtain a copy of this form from the Broker or Manager
- Complete a "Transaction Worksheet" to indicate both Sales Associates are working together on the transaction

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### SECTION 1: Experienced Sales Associate/New Sales Associate Agreement

\_\_\_\_\_ (Experienced Sales Associate's name) agrees to partner with \_\_\_\_\_ (New Sales Associate's name) on the first two transaction sides of real estate purchase or sale transactions the New Sales Associate is credited with closing. As part of the partnership, the Experienced Sales Associates shall allow the New Sales Associate to shadow him/her to accomplish the items identified in the PartnerUp Program Guidelines. In return, \_\_\_\_\_ (Experienced Sales Associate's name) shall be entitled to 25% of the commissioned earned by \_\_\_\_\_ (New Sales Associate's name) on the first two Weichert transaction sides closed.

New Sales Associate's Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Experienced Sales Associate's Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Broker/Manager Signature: \_\_\_\_\_ Date: \_\_\_\_\_

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### SECTION 2: Transaction Information

**Transaction 1** MLS #: \_\_\_\_\_ (Attach copy of MLS Sheet)

Type (Check One): ☐ Listing ☐ Sale ☐ Both      % to Exp SA \_\_\_\_\_ % to New SA \_\_\_\_\_

Property Address: \_\_\_\_\_

Broker/Manager Signature: \_\_\_\_\_

**Transaction 2** MLS #: \_\_\_\_\_ (Attach copy of MLS Sheet)

Type (Check One): ☐ Listing ☐ Sale ☐ Both      % to Exp SA \_\_\_\_\_ % to New SA \_\_\_\_\_

Property Address: \_\_\_\_\_

Broker/Manager Signature: \_\_\_\_\_

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## PartnerUp Program Guidelines

The PartnerUp program is designed to help a new Sales Associate get started in the business by having them partner with a competent, experienced Sales Associate who embraces Weichert's tools and systems.

The recommendations below are provided to help make the partnership as successful as possible, however, it is up to the two Sales Associates who are partnering to determine the best way to work together to close two transactions. In return for partnering, the New Sales Associate will share his/her commission with the experienced Sales Associate (recommendation is 25% of the new Sales Associate's commission on each of the first two transactions).

In addition to partnering together on the first two transactions, the experienced Sales Associate agrees to allow the new Sales Associate to **shadow** him/her on the following key sales activities.

- Open Houses (preparing for, conducting, and following up from Open Houses)
- Buyer Consultation
- Completing contracts and necessary paperwork as part of the transaction
- Step 1 Listing Appointment and prep for that appointment (using "Getting to Know You")
- Preparing a Price Trend Analysis
- Step 2 Listing Appointment and prep for that appointment (using the customized DOORs Portfolio)
- Completing a listing agreement and necessary paperwork as part of taking a listing

Target Audience: New to Real Estate.

Duration: Until new Sales Associate completes first two transactions.

Eligibility: Any licensed Weichert Sales Associate proficient in the Weichert tools and systems.

Anyone interested in working with a new Sales Associate as a partner should speak with their Broker or Manager.



## PartnerUp Program Checklist

Bring this coaching guide with you to each PartnerUp meeting to check your progress and review next steps. Possible observation opportunities with your PartnerUp partner include:

Shadowing Appointments to Observe your Partner in the following:

- Open House (Minimum of 2)
- Listing Step One
- Listing Step Two
- Buyer Consultation
- Buyer appointment to view homes
- Home Inspection
- Settlement/Closing

Prospecting Activities:

- Practice dialogue
- Attend company/office call sessions together
- Neighborhood door knocking

Open Houses:

- Observe how to maximize traffic to an Open House – Calls, email blasts, social media, neighborhood invites, etc.
- Prepare for and conduct an Open House
- Build Your Open House Kit: Create marketing and neighborhood materials to display at Open Houses
- Observe and practice dialogue to engage and close with each of your guests
- Use the myWeichert Open House App to register attendees
- Observe tools and dialogue to follow up with each guest

### Opportunity Time:

- Learn Opportunity Time Policy
- Handle phones at Opportunity Time
- Review and practice Point of Sale dialogue

### Working with Buyer Activities:

- Customize and conduct a Buyer Consultation
- Review Exclusive Buyer Agency and disclosure forms
- Review procedures, paperwork, and checklist
- Prepare a sales contact
- Present and negotiate an offer (Present “in person”, when possible)
- Prepare for and attend a closing/settlement
- Attend appraisal appointment
- Attend property inspection
- Attend final walk-through

### Working with Seller Activities:

- Customize and present DOORS Listing Presentation
- Complete and review a listing packet
- Prepare a Price Trend Analysis
- Conduct a Two-Step DOORS Listing Presentation
- Prepare/conduct a Price Improvement meeting using the Market Update Tool
- Negotiate an offer
- Prepare and go to a closing