

# Client Care Coordinator Position Agreement

The overall role of the Client Care Coordinator is to provide the highest level of support to <<<team name here>>> and its clients and customers. It is expected that this position will support and assist all departments within the company with all clerical duties, data entry, and all other relevant administrative duties so that the <<<team name here>>> maintains and grows its client base.

Deliberate duties to be performed in this position include but are not limited to the following :

## Administrative

- Oversee all aspects of the administration of the agent's business.
- Create and manage all systems for sellers, buyers, client database management, lead-generation tracking, lead follow-up, and all office administration.
- Maintain all agent financial systems, profit-and-loss statement, bill payment, budget(s), bank accounts, and business credit card(s).
- Coordinate the purchasing of any office equipment, marketing materials, and any other business-related supplies and materials.
- Create and update a business operations manual and all job descriptions/employment contracts for any future hires.
- Manage the recruiting, hiring, training, and ongoing leadership of all future administrative hires.
- Hold agent(s) accountable for conducting all agreed-upon lead generation activities.
- Ensure that all agent activities are limited to listing property, showing property, negotiating contracts, and lead generation.
- Open office and turn on all electronics; turn on lights and prepare office for staff and client arrival.
- Answer phones in a polite, professional manner.
- Return all emails within 15 minutes.
- Participate in Daily Huddle, review daily schedule, and determine course of action for anything unscheduled.

- Prepare team meeting agenda and distribute prior to meeting .
- Take and distribute full meeting notes.
- Send cards for upcoming milestones (birthdays, anniversaries, and so on).

## **Listing (Listing to Contract)**

- Oversee all aspects of seller transactions from initial contact to executed purchase agreement.
- Prepare all listing materials: pre -listing presentation, listing agreement, seller's' disclosures, comparative market analysis, online property profiles, multiple listing service (MLS) research, etc.
- Consult and coordinate with sellers all property photos, staging, repairs, cleaning, signage, lockbox, access requirements, and marketing activities.
- Obtain all necessary signatures on listing agreement, disclosures, and other necessary documentation.
- Coordinate showings and obtain feedback.
- Provide proactive weekly feedback to sellers regarding all showings and marketing activities.
- Coordinate all public open houses and broker open houses.
- Enter all listing information in MLS and marketing websites and update as needed.
- Submit all necessary documentation to office broker for file compliance.
- Input all necessary information to client database and transaction management systems.

## **Transaction Coordination (Contract to Closing)**

- Oversee all aspects of buyer and seller transactions from executed purchase agreement to closing.
- Coordinate title/escrow, mortgage loan , and appraisal processes.
- Coordinate inspections, assist in negotiations regarding repairs, and coordinate completion of repairs.
- Regularly update and maintain communication with clients, agents, title officer, lender etc.
- Submit all necessary documentation to office broker for file compliance.
- Coordinate moving/possession schedules.
- Schedule, coordinate , and attend closing process.
- Input all client information to client database system.
- Schedule 30 -day, 90 -day and 120 -day client customer service follow -up calls to assist with any home improvement provider recommendations and to ask for referrals.

## Marketing

- Supervise client database management program and system.
- Create and regularly prepare all buyer and seller consultation packages.
- Coordinate the preparation of all listing and open house flyers, graphics, signage, and all other marketing materials.
- Manage and update agent website(s), blog(s), and online listings.
- Regularly assist agent's to manage and enhance their social media presence.
- Track and coordinate all inbound leads from websites, social media, and other online sources.
- Coordinate all client and vendor appreciation events.
- Regularly obtain client testimonials for websites, social media and other marketing materials.
- Coordinate and implement agent marketing videos and property videos on website(s), blog(s), social media, and client database email campaigns.

## Behavior expectations for Client Care Coordinator are as follows:

- Flexibility is key!
- Manage and facilitate all necessary listing and/or closing paperwork.
- Prioritize teamwork.
- Complete and document work in a systematic process so it can be replicated and repeated every time in the same way.
- Save all work as instructed.
- Adhere strictly to standards and policies of the Company when completing any tasks or work.
- Perform all work in accordance with all government laws, regulations, ordinances, and court rulings in those jurisdictions in which the Company operates.
- Implement action plans to achieve the highest possible degree of standardization so results can be continually duplicated.
- Set and meet deadlines on time.
- Maintain a positive mindset and appropriate professional conduct while representing the Company, either in the office or while meeting clients.
- Keep strictly confidential all personal information about clients, customers, staff and/or employees.
- Promote and embody the philosophy of the Company at all times.
- Use the phrase, "We're selling houses!" when asked how the office is doing.
- Adhere to dress code policy at all times.

- Follow appropriate code of conduct implicitly and explicitly.
- Work scheduled days and hours.
- Practice and implement scripts and dialogs.
- Check and respond to email regularly.
- Refrain from removing company property from the premises without prior approval.

In accepting our offer of employment, you certify your understanding that your employment will be on an at -will basis, and that neither you nor any Company representative has entered into a contract regarding the terms or the duration of your employment. As an at -will employee, you will be free to terminate your employment with the Company at any time, with or without cause or advance notice. Likewise, the Company will have the right to reassign you, to change your compensation, or to terminate your employment at any time, with or without cause or advance notice.

## Position Hours

- Part time (Hours)
- Full time (Hours)
- Part time transition to full time (Start hours to end hours)

## Compensation

Paydays are on the 15<sup>th</sup> and 30<sup>th</sup> of each month.

Compensation for this position is as follows:

- \$2,050.00 gross per month

. OPTIONAL BONUS:

- \$50.00 bonus per file (up to 100 files per calendar year) that closes successfully and results in payment for the team. The bonus will be paid on the 30<sup>th</sup> of the month for all closings from that month.

## Agreement

Signing on behalf of the Client Care Coordinator and agreeing to this three (3) page document in its entirety is:

\_\_\_\_\_  
Signature of Client Care Coordinator

\_\_\_\_\_  
Date

\_\_\_\_\_  
Full name (please print)

Signing on behalf of the Chief Executive Officer and agreeing to this three (3) page document in its entirety is:

\_\_\_\_\_  
Signature of Chief Executive Officer

\_\_\_\_\_  
Date

\_\_\_\_\_  
Full name (please print)