



HIRING BEST PRACTICES

AMPLIFIED SOLUTIONS | HIRING BEST PRACTICES

Top 10 Hiring Tips:

1. How to Identify the Need

Take a deep look at what you have and what strengths the current team members have. People tend to make a mistake in hiring people similar to themselves, when in reality they need to be hiring to supplement their weaknesses. Spell out the position and the ideal, perfect world candidate. Then get real about your salary range and skillset. This can range from an unpaid intern helping with a variety of items to a salary plus bonus based on production.

We like to recommend sitting down with pen and paper and making a list of things you like doing and don't like doing. Another tip is to ask others or do an anonymous survey to get feedback here too. You have to be honest with yourself about your strengths and weakness to get the right people on board.

You should also speak to an accountant or HR professional to assess if you can hire staff as a 1099 contractor versus employee. There are a number of companies that can help you maintain compliance for w-2 employees and handle a simple payroll. We use and recommend TaxinHouse.com (be sure to drop our name) and also LegalDepot.com is great for documents specific to state laws (free, fully functional trial).

2. How to Write a Job Description and Come up with a Title

This is a crucial part of this process that is often underserved. It's really important to spell out the role you're looking to hire. Both in the day to day and in the high level of "what does it feel like" when this role is done well. You also want your company culture to shine through on this description.

The job title is very important too. Don't make it super fluffy, but don't make everyone your assistant either.

3. Where to Post the Job Description

We are big fans of Indeed and social media for sharing out jobs. One of the most overlooked opportunities is marketing to your sphere and past clients. These are people who really know you, how you work, and people that might work well with you. We highly recommend pushing out to your database that you are hiring. It's great marketing for your business that, "We're growing!", and also a great way to find ideal candidates.

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4. How to Manage Resumes

We highly recommend getting an account at Workable.com. At \$50 per month per job, posting with unlimited users, and a 14 day free trial this is an excellent low cost option to manage all resume information. This gives you the capability to invite others on your team to help review resumes and make notes on candidates. It also allows you to email the candidate(s) directly and create and save email templates for easy, consistent follow-up. Another advantage is the ability to put the candidates in different categories based on screening method or skill set. As you wean the number of candidates down you can easily cross them off the list or invite them to stay on the interview process. Resumes can be uploaded automatically which means you can spend more of your time analyzing candidates rather than working with software.

5. How to Screen Candidates and Set a Simple Follow up to Narrow Applicants

Read through with an open mind. We almost always send a round of some basic questions to narrow applicants quickly for anyone that qualifies for a second look. Some people won't even fill them out, some people will eliminate themselves with grammar or spelling and then you have a smaller pool to really dig a little deeper on. Once you receive the feedback on that second tier of questions, you will have a better idea who each candidate is based on their answers and their resume.

We highly recommend Calendly (free trial, then also a free, one-event version after that) for setting up in person interviews or phone calls.

6. Interview Questions to Ask

It's important to ask questions to get a feel for how the person will respond to day-to-day tasks.

We suggest focusing on asking open-ended questions and letting the interviewee talk as much as they can.

You can also plan to ask for a DISC profile as an additional measure - at meeting or in advance. We're big fans of the report from the free Tony Robbins DISC found here: <https://www.tonyrobbins.com/disc/>

Generally, your first impression of someone will be right, in our experience - read "Blink" by Malcolm Gladwell if you ever want to dig deeper on this.

Consider giving them some time with someone else at the office or the team they will be joining - largely to get that person's opinion. You can step out to "grab a call" or get some coffee to give them a few minutes. Your agents and staff will respect you for asking their opinion too.

As with many things, you get better as you do a few interviews. We recommend setting up interviews with a few B prospects before meeting with any A prospects to find what techniques work best for you.

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7. How to Pick a Final Candidate

Take some time with the narrowed resumes and ideas. Make a spreadsheet if that's your thing and give applicants a score or a way to compare and contrast them. Meet them by phone and then in person. This gives you two different viewpoints of their behavior and professional work ethic. It also allows you to see if they would fit into your company culture and day-to-day office business. Another option is to have them "test drive" or "shadow" the office for a day. Have final candidates meet some of your staff to see if they fit in well and see how quickly they pick up on certain things to help you determine the best fit. Keep in mind skill set and personality traits so you come out with the best fit for your company on all levels.

8. How to Make the Job Offer

It's super important that you MAKE THE PERSON AN OFFER. We see people all the time basically say, "You're not terrible, let's try this out." That's just not a good way to start. Make it a big point that you are choosing them from a pool of candidates and that you are excited to work with them. Make sure they know that it will be hard work, but you're confident in their abilities and happy to get to know each other. We also recommend a formal offer letter spelling out the basic terms and expectations.

9. Onboarding Basics

Have a formal onboarding process - even if it's super simple. One great way to start your own onboarding list is to just start writing down everything that you do when you bring on the next hire or agent. Think really basic items like software logins, company email address, business cards, pic and bio, etc.

10. Now What? 30/60/90, Etc.

Set a note in your calendar for 30/60/90 day reviews as soon as the person signs their agreement. We recommend having a one-on-one in person meeting to talk about what's going well and what could be improved. You should plan for an annual review moving forward after your initial reviews.

We also highly recommend writing this down and keeping a copy on file and ideally sending the employee/agent/contractor with a written copy to review beyond the meeting. Pro tip: this also makes dismissal easier if there are things addressed early that don't get fixed over time.

You can find our sample review form, sample job descriptions, and interview questions later in this guide.

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Hiring Best Practice Tips:

It is very important that you have a process for taking applications. For one, to keep all applications organized and accessible, but also to cast a wide net for candidates. This allows you to quickly eliminate those who don't match or don't follow instructions.

We recommend posting the job as many places as possible, with clear instructions, for the applicants to follow. Our general process is to take all submissions through Indeed.com and use a template there to send a follow up typeform questionnaire. Applicants are eliminated if they don't follow this second step.

We then only review resumes who submitted a Typeform and generally set up very short, 30 minute maximum, calls. If the applicant is still of interest, an introduction to a hiring manager or person who interviews follows with a written history of Applicant (resume, typeform, notes on pros and cons, and notes from calls).

We also highly recommend a DISC profile on the applicants either prior to a call or after a call if the applicant is of further interest. There's a great free disc profile you can link them to at: <https://www.tonyrobbins.com/disc/>. There is also a number of paid versions that you can purchase to facilitate the test going out to the applicant/candidate. Make sure you "verify" or validate the results with a follow up call or meeting.

For resume management, we highly recommend Workable or a similar platform. Google Drive can also be a useful tool to organize resumes and typeforms that have been reviewed or need to be reviewed, and for keeping notes on candidates.

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Tools to Use to Take Applications or Follow Up:

Indeed

Typeform

Jotform

WuFoo

DISC profile

(We use Calendly or meetme.so to schedule calls and interviews)

Places to Post Your Ad:

Facebook profile or Company page

Other social media as relevant

Indeed.com (recommended as a source to manage resumes and notes)

Any local job boards or relevant Trade associations

Market to your database or past clients (if applicable)

Specifics If You Need to Post Anonymously:

Sometimes it makes sense to make your job postings anonymous. Either replace someone at your current company or otherwise don't reference your company name. Using a free Gmail address can be an excellent way to do this. Create a new Gmail address such as, "AustinRealEstateJobs@Gmail" and use that to take all applications. Be sure that the "real name" on the account isn't affiliated with your company in any way as well. You can also set up an autoresponse in this account to send a typeform or automated second step for applicants.

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Title: Operations Manager/Team Manager | Team Job Description

Overview: This role is responsible for managing all aspects of the team and its activities.

The Operations Manager should have excellent communication skills, strong organizational skills, detail oriented, and methodical in following up.

Previous management experience is highly preferred. This includes non-traditional management or leadership (such as volunteer work, involvement at church or community activities). Applicant should be good at seeing the big picture and delegating, or otherwise be sure priority tasks are consistently being handled.

Responsibilities:

1. Working with the owner(s) to create a comprehensive plan for the team.
2. Basic training sessions for all relevant team members to implement the team's plan.
3. Organizing and conducting meetings for the team.
4. Creating and measuring systems and processes to help the whole team work effectively and efficiently.
5. Managing the buyer specialists and helping them set goals and time manage.
6. Keeping the owners attuned to details of the business and providing statistics, data, and profit and loss statements at consistent meetings.
7. Staying aware of emerging technology

Specific Knowledge or Software:

The Operations Manager or Team Manager is the hub of the team. They are ideally a leader AND a manager who can think creatively and execute a reasonably thought out plan with the ability to pivot as the team evolves and the market changes. It is nice to have real estate experience, but people out of industry can often have success in this role as well. The ideal candidate should be capable of having "hard conversations" with those when needed, and also a strong motivator for everyone on the team.

Compensation: [COMPENSATION HERE] Recommend base + Bonus tied to production

[SPECIFICS on how to apply here]

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Title: Buyer Specialist/Buyers Agent | Team Job Description

Overview: This role is the primary sales force of the team. They are often the consumer's first contact with the group and should be good communicators.

Responsibilities:

1. Converting leads for various sources (unless team has an ISA structure in place)
2. Showing properties and advising clients on "pre-offer" things to know or consider
3. Writing offers and negotiating them to contract
4. Turning in fully completed contract to appropriate parties (Attorney, Title, TC, etc)
5. Managing appropriate parts of the contract process - inspections and similar
6. Attending training sessions for the team or office
7. Following the plan set forth by the owner(s) or Operations Manager

Specific Knowledge or Software:

The Buyer Specialist position is the most varied position on the team. Some teams use an ISA model, where the agent needs to only take a warm lead to tour homes and write a contract. Other teams rely on the agent to convert and prioritize leads (ideally using a CRM system to help and notate progress). It is highly recommend that you consider your team's short and long term model before deciding on what type of agents you want on your team. Be sure they are clear on their responsibilities as an agent on the team.

Compensation: [COMPENSATION HERE - generally commission only]

[SPECIFICS on how to apply here]

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Title: Transaction Coordinator | Team Job Description

Overview: This role is responsible for managing the documents and tasks associated with managing a transaction. The Transaction Coordinator should have strong organizational skills, be detail oriented, and methodical in following up and making sure everything is handled properly. Since they interact with agents on a day-to-day basis, they will need some level of people skills.

Responsibilities:

1. Collecting contract documents from the agent, or from the buyer or seller
2. Communicating with title and mortgage contacts
3. Reviewing contracts and materials for compliance issues that should be flagged for the broker to review in depth.
4. Maintaining an organized set of files for each contract, and tracking all relevant deadlines and contract-related dates.
5. Proactively communicating with agents for whom the transaction coordinator is managing transactions. Weekly communication about the status of the transaction is required, and as-needed communication for any issues that arise during the transaction.

Specific Knowledge or Software:

Transaction Coordinators should have in-depth knowledge of the real estate transaction. Candidates for this position should have managed either their own personal transactions or acted as a transaction coordinator for another agent or firm. Candidates should possess customer service and communication skills, and will have demonstrated capabilities in past roles and jobs. The Transaction Coordinator must be detail oriented and self-organizing in order to fulfill this role. Working knowledge of electronic transaction management systems is required; specific experience with our firm's system is not required.

Compensation: [COMPENSATION HERE]

[SPECIFICS on how to apply here]

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Title: Listing Manager/Specialist | Team Job Description

Overview: The Listing Manager will ensure that all company listings are entered uniformly and timely, and that all listing marketing is handled according to company standards.

Responsibilities:

1. Entering and managing listings in the MLS,
2. Creating marketing collateral (usually from templates) for print materials,
3. Managing listings on portals such as Zillow, Realtor.com, and Trulia.
4. Manage paid advertising in print newspapers and magazines.
5. (Optional) prepare seller reports showing activity on listings,
6. (Optional) write marketing descriptions of properties
7. (Optional) manage social media promotion of listings, and advertising spend associated with Facebook marketing.

Specific Knowledge or Software:

The Listing Manager should be familiar with the listing process; data entry into the MLS service(s), general compliance of that data, creation of essential marketing materials to company standards, and general license law.

[Your CRM, Graphics programs, software specifics here]

Compensation: [COMPENSATION HERE]

[SPECIFICS on how to apply here]

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Title: Marketing Admin | Team Job Description

Overview: The Marketing Admin is responsible for coordinating all marketing for the company and for individual agents. Experience with basic design preferred, but not required to have the level of a full graphic designer. They would usually work from existing designs and templates.

Responsibilities:

1. Create marketing collateral for agent's (listing materials, persona branding pieces, newsletters, blog articles, social media, etc.)
2. Basic knowledge of HTML
3. Writing experience
4. Basic graphics production.

Specific Knowledge or Software:

Marketing Admin should have an eye for design and understanding of general real estate marketing. Familiarity with real estate terminology strongly preferred, as well as strong writing and editing skills. This position should be a solution-oriented project manager.

[Your CRM, Graphics programs, software specifics here]

Compensation: [COMPENSATION HERE]

[SPECIFICS on how to apply here]

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Title: Graphic Designer | Team Job Description

Overview: The Graphic Designer is responsible for creating graphics and templates for the real estate company, property listings, agent marketing materials, and branding. This person should have some level of training or background in graphics or the arts, as well as experience creating marketing materials.

Responsibilities:

1. Creation of marketing materials for the brokerage and for agents
2. Creation of materials for recruiting agents
3. Creation of templates for the Marketing Manager to fill in

Specific Knowledge or Software:

The Graphic Designer should be an experienced graphic artist with prior work experience in graphic design. Examples of past work should be a part of the application process. Experience with real estate preferred, but not required.

Adobe creative cloud experience preferred
[Your CRM, Graphics programs, software specifics here]

Compensation: [COMPENSATION HERE]

[SPECIFICS on how to apply here]

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Title: Technology Coordinator | Team Job Description

Overview: The Technology Coordinator is responsible for supporting the agent's use of brokerage technology. They are also responsible for advising the company on other technology tools to consider and help in company technology decisions. The role could work in tandem with the Sales Manager role on training.

Responsibilities:

1. Training agents to use CRM database
2. Developing best practices for broker-supplied tools,
3. Managing (or training on) agent websites and social media,
4. Training agents on their day-to-day use of all tools and software

Specific Knowledge or Software:

The Technology Coordinator should have a strong general knowledge of existing real estate technology (including, but not limited to; IDX services, CRM software, website platforms, cloud storage software, digital signature programs and document management and financial/accounting software). They should also be competent to keep aware of upcoming technologies and make rational decisions and suggestions based on company needs and changing real estate landscape.

[Your CRM, Graphics programs, software specifics here]

Compensation: [COMPENSATION HERE]

[SPECIFICS on how to apply here]

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Title: Inside Sales Agent/Lead Converter | Team Job Description

Overview: The Inside Sales Agent is responsible for handling leads generated by the company and assigns them to the appropriate agent at the appropriate time.

Responsibilities:

1. Follow up with all leads
2. Determine lead motivation
3. Assign to appropriate agent or put on marketing campaign and follow up plan if not
4. Manages the follow up process, keep track of leads and prioritize for follow up,
5. Follow up on leads once assigned to agent according to company policy and systems

Specific Knowledge or Software:

The Inside Sales Agent should have a broad understanding of local real estate, consumer behavior and sales/conversion scripts. This role may be responsible for creating best practices for lead conversion for company agents if applicable. The Inside Sales agent should nearly always have prior sales experience and documented success in a sales role.

[Your CRM, software specifics here]

Compensation: [COMPENSATION HERE]

[SPECIFICS on how to apply here]

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Title: Agent Assistant | Team Job Description

Overview: This role assists an agent with administrative tasks so they can focus on sales and meeting with clients.

Responsibilities:

1. Manage listings and marketing material creation for the agent,
2. Manage transactions at a high level,
3. Manage important projects for agents (newsletters, holiday cards, and other marketing)
4. Organize an agent calendar and appointments

Specific Knowledge or Software:

The Agent Assistant should be a very organized person and task-oriented with a structured schedule. Experience working with real estate agents or brokers preferred.

[Your CRM, Graphics programs, software specifics here]

Compensation: [COMPENSATION HERE]

[SPECIFICS on how to apply here]

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Title: Office Manager (Single Office) | Brokerage Job Description

Overview: The Office Manager is responsible for the daily operation of the office and management of staff in the office.

Responsibilities:

1. Ensure all staff resources, technology, or materials are functional and accessible at all times
2. Manage staff, including projects and priorities and resolve any conflicts or confusion
3. Manage and report budget and P&L to owners
4. Manage payroll
5. Maintain compliance with real estate commission and federal and state laws

Specific Knowledge or Software:

Proven capabilities managing an office and small business including, basic bookkeeping, staff management, and business compliance processes. Ability to set priorities and organize projects for staff members to complete.

Working ability with accounting software, MS Office or Google Docs, and ability to organize files electronically is a requirement.

[Your CRM, Graphics programs, software specifics here]

Compensation: [COMPENSATION HERE]

[SPECIFICS on how to apply here]

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Title: Sales Manager | Brokerage Job Description

Overview: The Sales Manager is responsible for managing all sales operations in a brokerage context. Sales managers often have broker supervisory responsibilities.

Responsibilities:

1. Onboard real estate agents new to the company
2. Provide training calendar and company materials to agents
3. Keep agents informed of changes to company procedure and policies
4. Deliver training to agents on company processes, sales, and real estate process
5. Coach and manage agents within the office to improve productivity and retention
6. Identifying potential agents to recruit into company
7. Recruiting targeted agents into the company
8. Conduct recruiting appointments
9. Follow up with and nurture potential recruits as a sales activity

Specific Knowledge or Software:

Sales Manager must have excellent knowledge of real estate sales and should have a significant background in their own personal sales. The Sales Manager must also have demonstrated skill in training, coaching, and mentoring other agents. The Sales Manager must be able to plan and organize training for the agents including arranging facilities, materials, and communicating to agents about the training. Sales Manager must have demonstrated experience at recruiting agents, either to their own team or in another sales management context.

Compensation: [COMPENSATION HERE]

[SPECIFICS on how to apply here]

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General Interviewing Tips:

We suggest focusing on asking open-ended questions and letting the interviewee talk as much as they can.

You can also plan to ask for a DISC profile as an additional measure - at meeting or in advance.

Generally, your first impression of someone will be right in our opinion (read "Blink" by Malcolm Gladwell if you ever want to dig deeper on this)

Consider giving them some time with someone else at the office - largely to get that person's opinion. You can step out to "grab a call" or some coffee to give them a few minutes. Your agent/staff will respect you for asking their opinion too.

As with many things, you get better as you interview a few times. I would try to set up interviews with a few B prospects before meeting with any A prospects.

Lastly, try to be open ended and let them answer or keep talking - or ask short questions like:

- Why?
- How did that make you feel?
- What did you do after that?

We also HIGHLY recommend trying to scare them a little at this point in the game.

OVER-emphasize that real estate is demanding and agents are needy and want everything yesterday. Be clear that you have very high expectations of them. This will (hopefully) hedge your bets for people to stay long term and not be surprised by the constant stuff coming at them.

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Examples for NEW Agent Interview Questions:

Questions to Possibly Ask:

- Do you currently have your license? Or have you started the process?
- Have you bought or sold real estate personally before?
- Do you know other real estate agents in the area?
- What attracted you to Real Estate?
- What is your ideal day like (can be work or personal)?
- What do you think an “average” day in real estate looks like?
- What other experience do you have that might be relevant to real estate?
- What are your areas of weakness and how have you learned from past mistakes?
- What systems do you currently use to keep organized?
- Do you feel comfortable with the area (geographically)?
- Where do you see yourself in 5 years? 10 years?
- What are you looking for in a brokerage/team?
- What do you look to for inspiration?

Beyond that, you should read some of their resume out loud and let them fill in some blanks or answer questions that you have.

We also HIGHLY recommend trying to scare them a little at this point in the game.

OVER-emphasize that real estate is demanding and agents are needy and want everything yesterday. Be clear that you have very high expectations of them. This will (hopefully) hedge your bets for people to stay long term and not be surprised by the constant stuff coming at them.

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Examples for Experienced Agent Interview Questions:

Questions to Possibly Ask:

- What attracted you to Real Estate?
- What is your ideal day like (can be work or personal)?
- What are your areas of weakness and how have you learned from past mistakes?
- What systems do you currently use to keep organized?
- Do you feel comfortable with the area (geographically)?
- Where do you see yourself in 5 years? 10 years?
- What are you looking for in a brokerage/team?
- What do you look to for inspiration?

Beyond that, you should read some of their resume out loud and let them fill in some blanks or answer questions that you have.

We also HIGHLY recommend trying to scare them a little at this point in the game.

OVER-emphasize that real estate is demanding and agents are needy and want everything yesterday. Be clear that you have very high expectations of them. This will (hopefully) hedge your bets for people to stay long term and not be surprised by the constant stuff coming at them.

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Examples for Staff (Non-Management) Interview Questions:

Questions to Possibly Ask:

- What attracted you to Real Estate?
- How has your prior experience prepared you for this role?
- How do you prioritize tasks given to you?
- What are your areas of weakness and how have you learned from past mistakes?
- What is your ideal day like (can be work or personal)?
- What systems do you use to keep organized?
- Are you a good speller? Writer?
- Do you feel comfortable with the area (geographically)?
- Where do you see yourself in 5 years? 10 years?
- What would you do if you won the lottery (i.e. Didn't HAVE to work)?
- What's the worst job you've had? Why?
- What is the best job you've had? Why?
- Have your ethics ever been tested at a job? How?

Beyond that, you should read some of their resume out loud and let them fill in some blanks or answer questions that you have.

We also HIGHLY recommend trying to scare them a little at this point in the game.

OVER-emphasize that real estate is demanding and agents are needy and want everything yesterday. Be clear that you have very high expectations of them. This will (hopefully) hedge your bets for people to stay long term and not be surprised by the constant stuff coming at them.

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Examples for Management/Staff Interview Questions:

Questions to Possibly Ask:

- What attracted you to Real Estate?
- How has your prior experience prepared you for this role?
- How do you prioritize tasks given to you?
- What are your areas of weakness and how have you learned from past mistakes?
- What is your ideal day like (can be work or personal)?
- What systems do you use to keep organized?
- Are you a good speller? Writer?
- Do you feel comfortable with the area (geographically)?
- Where do you see yourself in 5 years? 10 years?
- What would you do if you won the lottery (i.e. Didn't HAVE to work)?
- What's the worst job you've had? Why?
- What is the best job you've had? Why?
- How your ethics ever been tested at a job? How?

Beyond that, you should read some of their resume out loud and let them fill in some blanks or answer questions that you have.

We also HIGHLY recommend trying to scare them a little at this point in the game.

OVER-emphasize that real estate is demanding and agents are needy and want everything yesterday. Be clear that you have very high expectations of them. This will (hopefully) hedge your bets for people to stay long term and not be surprised by the constant stuff coming at them.

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Offer Letter Example:

COMPANY LETTERHEAD

Company Street Address
City, State & Zip

Offer of Employment

Offer Date

Offeree's First & Last Name
Street Address
City, State & Zip

Dear (Offeree First & Last Name),

Congratulations! On behalf of (Company Name) we are pleased to offer you the position of (Job Description). This is a vital role to the success of (Company Name), and we believe you are the perfect candidate. Should you accept our offer, your start date will begin on (Month Date, Year).

Your compensation and benefits package includes the following:

- Annual salary of (\$XX,XXX) paid bi-monthly with a performance review in (X Days/Months)
- Bonus of (\$ or % of salary) based on (individual/team performance/goals)
- (Dental & Health Insurance Package)
- (401k or Retirement Plan Package with Vesting Schedule)
- (X weeks/days of vacation days and/or X weeks/days of PTO)
- All additional benefits outlined in company handbook

Everyone who met with you was very impressed with your character and experience. We believe you will be a great fit in our company's culture. We are looking forward to your response. If you have any questions, please don't hesitate to give me a call.

Sincerely,

(Inked Signature)

(Offeror's First & Last Name)
(Offeror's Position Title)

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Employee Performance Review Example:

Employee: _____

Date: _____

Position Title: _____

Date of Last Review: _____

Reviewer: _____

Performance Evaluation	Excellent	Good	Fair	Poor	Comments
Punctuality					
Work Ethic					
Cooperation					
Attitude					
Takes Initiative					
Creativity					
Completing Tasks					
Enthusiasm					
Client Relations					
Coworker Relations					
Honesty					
Work Consistency					
Communication					
Quality of Work					
Leadership					
OVERALL RATING					

You can also use a number system from 1-10 to rate each category and get a total number. From this you can find employee averages to compare against and set the standards.



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New Agent/Employee Onboarding Example:

Company Name New Agent/Employee Onboarding Guide

- Sign Agent/Team/Brokerage Agreements
- Execute all legal documents (tax paperwork, etc)
- Set up @MyCompanyHere.com email address – firstname@MyCompanyHere.com email address
- Set up email signature (See agent handbook)
- Update Cell phone voicemail (See agent handbook)
- Set up on any communication tools as user and add to appropriate channels
- Order business cards
- Add to Intranet site (and/or other software)
- Get Agent/Employee picture + bio
- Share any relevant calendar invites or ongoing events
- Create Follow Up Boss (or other CRM) account - add to lead rotation when ready
- Add to voicemail and phone system (if relevant)
- Add to appropriate virtual folders
- Add to website(s) as agent/staff
- Obtain any brokerage logins as needed.
- Set up phone/tablet (See agent handbook)
- Review handbook with team member (how to turn in contracts)
- Agent responsibilities to generate business
- Team swag
- Key to Brokerage/Team office (if relevant)
- Discuss basic safety for agents (add tips to handbook)
- Send agent agreement to appropriate parties at brokerage
- 30/60/90 day review