



## SALES & LETTINGS MANAGERS JOB DESCRIPTION

<b>Reporting to:</b>	Regional Director
<b>Responsible for:</b>	Designated Residential and Lettings staff
<b>Purpose:</b>	To create the largest active 'on market' share of any agent in the area To create the largest overall market share on exchanged/let business To maximise branch profit Exceed the branch's budgeted income levels for residential income, lettings income and all 3 <sup>rd</sup> party income lines Exceed personal budgets and targets Hit bonus scheme targets on quarterly basis
<b>Key Accountabilities:</b>	Branch performance and contribution Performance against key activity targets including referrals Business creation in all key areas Personal Client Visit generation Property register management Client Visit to instruction conversion personally and for the branch Operational Audit adherence Brand guidance adherence Potential log & Opportunity log standards NG notes standards Client Standards Branch Pre-Client Visit database development Branch phone call activity levels - dashboard Sales and Lettings core priorities Staff Development Third Party income generation

## **KEY RESPONSIBILITIES:**

### **ACHIEVING BUDGET**

Achieves all personal and team, financial and conversion targets and third-party targets

Ensures that we grow market share in area of coverage regardless of market conditions

Personally responsible as office main Client Visit generator and office main instruction taker for generation and conversion of Client Visits to achieve instruction targets within agreed fee parameters

Responsibility for high conversion levels of Market Appraisals to full service sole agency Instructions and Third-party sales with additional products and premium fee services

Ensures that Client Visit generation activities/objectives take precedent over other activities and are delivered regardless of branch challenges

Develops specific and detailed plans for Client Visit generation involving all members of the team and direct accountability by person. Ensures that all staff personally drop a minimum 300 leaflets a week.

Ensures the active growth of the Pre-Client Visit database of contacts to enable future Client Visit generation. Ensures that all staff personally contribute to increasing the volume and accuracy of these figures

Analyse market share in delegated post code areas and price bands and take appropriate action to improve in underperforming areas and price ranges

Ensures all branch expenditure is within budget or preapproved business plan variation

Reviews the office Opportunities Log daily and ensures this is used by all staff to maximise potential opportunities. Targets sales results not opportunity reduction.

Daily upload of tout clients to NG to achieve minimum of 80% penetration of clients on the market with other agents. Undertake door knocking to ensure this is achieved.

Ensure Client Care meeting is effectively run with the team and enables delivery of engaging and effective client contact and actions each week

Daily review of viewing feedback – utilising the mobile feedback app and the price slider

Reviews dashboard daily and ensures adequate time management structures are in place to allow all members of the team to achieve their daily and weekly call targets.

Reviews NG notes daily and email volumes and quality daily to ensure all staff are clearly communicating with customers and clients and staff are using correct note types.

Focuses the team on achieving/exceeding targets for all 3<sup>rd</sup> Party referrals and sign up levels. Monitors progress and coaches staff to improve performance.

Maintains and maximises historic contacts through the use of the NG chase date systems and notes records for Clients, Properties and applicants. Ensures no paper records are held offline and without a corresponding NG record

Maximises centrally controlled canvassing campaigns and DMS and develops local canvassing initiatives to compliment these on a weekly basis in line with canvassing targets.

Takes ownership of and maximises the campaigns and initiatives launched locally for their branch.

Ensures post listing process is correctly followed to set client expectation. Sell third party and agree review/revisit

Ensures a quality property register is maintained and appropriate revisits for price reviews are undertaken. Ensures full system data, via the marketing reports and portals, is used.

Ensures that every client is called weekly and an NG client note made summarising applicant response and advising next actions required. Undertake a client review meeting using the published agenda to ensure the maximisation of effective client care

Monitors and measures the quality of viewings feedback from every member of the team. Ensure

viewings feedback is completed via the mobile app, using the price sliders

Agrees Prediction with SST monthly and monitors SST progress via notes. Monitors immediate post sales opp lines to ensure conveyancers are instructed and mortgages are applied for swiftly. Escalates issues to SST and agrees actions with SST team leader to ensure a minimum of a 33% turn each month with exchanges taking less than 90 days. (Sales only)

Weekly review of the pipeline. Oversees the pipeline and liaises with SLT/CLT to ensure smooth move ins and swift exchanges that are all under 15 days from agreed lettings (Lettings Only)

Personally run offer process to provide assurance to the client and manage transaction to deliver their preferred outcome. Liaise with SST/SLT/CLT, monitor deals and take action to avoid abandons and manage branch responsibility compliance. Personally secure sales of third party where not previously secured by the team

Preparation of comps packs for surveyors at point of sale agreed (Sales only)

## **MANAGEMENT & BUSINESS STRUCTURE**

To keep up to date with and adhere to and actively implement all elements of the company's systems, processes, policies, procedures and Business Priorities and Client Standards, which are updated from time to time and ensure that all staff understand and focus on implementing them. This job list should be read in conjunction with those documents

Ensures that the branch focuses on delivering high levels of client standards and delivering a complete service which retains clients and maximises opportunities. Ensure all clients receive a weekly call regardless of viewing activity to re-enforce quality feedback, undertake competing property analysis and where appropriate plan for potential price reductions agreed. Ensure re-visits take place at 4 week intervals where no price change has taken place. Ensure there is an NG note emailed to the client to reflect this

Runs daily morning meetings using the daily potentials log and agrees daily focus and targets. Ensures that focus is maintained throughout the day on delivery of Client Visit potentials by monitoring and quality checks. Ensures records are kept of these meetings. Drives morning call activity by leading from the front during protected Client Visit call out.

Runs daily afternoon meetings using the daily potentials log and agrees daily focus and targets. Ensures that focus is maintained throughout the afternoon on delivery of Deal potentials by monitoring and quality checks. Ensures records are kept of these meetings. Drives afternoon call activity even if not present.

Runs weekly Client review meeting using the NG system. Reviews every client marketing progress and response to date. Delegates individual staff to make each client call based on various criteria and ensures by monitoring calls and client notes that calls have been made and that each call covered objectives agreed in the meeting. Complete the client care grid and sign off the teams quality of notes

Structures and organises the diary to ensure that adequate time is given to key activities e.g. applicant management, client feedback, canvassing, Client Visit booking etc. Gives protected time where appropriate. Checks during the day and following day that tasks were completed at the allotted time. As standard 9-12 should be set as protected outbound Client Visit generation call time.

Ensures that personal call time is protected by training staff to defend incoming calls and handle incoming enquiries so as not to impede personal call time.

Ensures the branch makes in excess of 50 proactive quality connected outbound calls per person per day, not including admin, which are noted on NG.

Upholds company standards at all times. Acts as a role model for all within the branch and ensures that

personal and team behaviour and presentation is exemplary at all times

Actively monitors activity and quality e.g. client notes, viewing feedback, opportunity log audits, applicants audits, review Client Visit forms, reviewing targets.

Ensures that the branch is focused on performing to standards that will engender positive 5 Star customer service reviews from customers. These reviews must be actively sort from all customers and they should be encouraged to post them online through the company approved partners

Ensures that applicants are maximised. Ensure the focus is on qualifying motivation before understanding requirements. Applicants should be matched requirement to requirement not by budget and applicants wants, needs and likes must be determined in order that staff can make recommendations and book multiple viewings. Ensure HOT applicants are discussed and called every 2/3 days and that LHTS and Local LL/Investors are given similar high priority and that at least one result is obtained from each call

Ensures that accurate information is given by staff regarding availability and viewing arrangements of properties to call applicants and that staff use the interest tab to record enquiries

Ensures that every enquiry is dealt with in a way that identifies the merits of that customer as an applicant in order that their interest can be put forward in its best possible light to the client and that the applicant has had the best opportunity to present themselves in a way that means they can secure the property.

Ensure all portal and website enquires (applicants and Client Visit requests) are called before 10am each day and throughout the day as they appear in NG.

Ensures quality file notes are made every week. Ensures the NG email notes facility is utilised to ensure effective client and customer communication and to allow for informed negotiations at all times.

Ensures that all new instructions are marketed same day as instructed using photos taken on Client Visit and absolutely no longer than company minimum standard timescales

Ensures that every property marketed is done so in line with CPR guidelines and that a CPR review has been done prior to marketing commencing so that the correct information can be provided to customers enquiring about the property

Ensures that the branch marketing activity is fully compliant with the company brand and compliance guidelines

Attends all training courses relevant to your role to enhance your knowledge and improve your performance.

Weekly participation on conference calls with pre-prepared information and action list update

## **STAFF MANAGEMENT**

Ensures staff meet their negotiator budgets. Sets and reviews targets on a regular basis, using weekly review form, e.g. call outs, daily targets, power hours, applicant management, weekly activity & opportunity reviews etc. Keep written records of these review forms

Conducts regular weekly/monthly reviews as directed by regional, using the latest Business Priorities and Client Standards document, call recordings and the activity & opportunity logs to analyse and monitor the strengths and weakness of individuals, the team and the branch. Develops staff to ensure maximum contribution.

Escalate to line managers where there is repeated failure to achieve required standards by an individual within the team. Provide a pack of weekly review records to support the escalation of the issues.

Ensure that their team are not 'order takers'. Focuses them on maximising opportunities and offering

multi service including viewings. Utilise mystery shopping records and review documentation to highlight improvements needed from individuals and keep records of these coaching sessions

Ensures that sickness and holiday is entered into the NG diary and that company procedures for record keeping, authorisation and notifying the line Director are adhered to.

Ensures that NG performance records are accurately recorded at all time. This includes but is not limited to the recording of; Diary events, Active register management, NG notes, Offer documentation, Sale agreed records, Lettings tenancy terms, abandons, withdrawals, internal and external splits on fees, records that would affect negotiator or manager commission or bonus claims.

Ensure all fees are above minimum fee level with any exceptions being approved in writing by a company director in advance

Ensure all other contract terms are within the target levels set.

## **COMPLIANCE REQUIREMENTS**

Equal opportunities – ensure that the whole team understand our equal opportunities policy and ensure that they personally follow the policy and the interview guidelines

Adherence to all sales, lettings and administration procedures

Ensures health, safety and security of the branch and all branch staff

Ensure staff undertake suitable risk assessments when carrying out viewings to ensure their safety and the safety of customers and clients.

Ensures appearance of branch is in accordance with documented standards

Ensures appearance and behaviour of staff is in accordance with documented standards and lead personally by example

Ensure high standards of staff interaction are maintained so that staff treat each other with mutual respect at all times and the team is one which people would aspire to work within. This includes ensuring there is no bad language, banter, inappropriate comments, bullying, harassment or innuendos.

Follows HR policy and procedures and raises matters to the HR Advisor or Line Director

Ensures accurate data is entered into NG at all times and that all client records are held and managed in accordance with Data protection guidelines

Follow CPR, Ombudsman and ARLA code of conduct and has passed the relevant examinations i.e. CPR, PRS, ARLA, NAEA etc.

Read and implement the guidelines/actions contained within the Particulars

Secure and maintain industry recognised qualifications, for example ARLA/NAEA Membership

Complies with Brand guidelines

Attends all training courses and ensures staff attendance with diary planning to avoid cover issues Is fully compliant with the company Dress and Operational Standards

## **AUTHORITY REQUIRED**

Authority is required from the relevant line Director prior to any actions taking place in any way in respect of:

- Recruitment/Dismissals/Disciplinary Measure
- Change of Staff Remuneration/Staff Benefits
- Holiday requests over 2 weeks / unpaid leave requests
- Changes, temporary or permanent, in working staff patterns or hours
- Non-attendance for sickness or unapproved reasons
- Budget Departures/Branch expenditure over pre-agreed budget
- Committing the company to instructions below the documented minimum fee levels
- Verbal agreement to or Signing of any corporate instruction arrangements
- Committing the company to upfront expenditure for an instruction beyond the standard marketing product offering
- Authorising any employee (CGEAL and Life FS) sale, purchase, let or rental
- Any Capital Expenditure or Property Expenditure
- Any marketing expenditure that is outside approved company ordering systems e.g. Capsule8
- Any marketing initiatives that is not detailed within the brand guidelines
- Local sponsorship
  - Any marketing initiative that has been drafted without approval from the marketing team or a Director
- Any communication with the press or any media representative
- Any communication with an industry body, the police, government or local authority

Authority is required from the Operations Director or Managing Director for all expenditure related to premises.

## **Estate Agency Recruiters**

**Matthew Davies-Pascoe 07779 149963**

LinkedIn [bit.ly/3AAEgDN](https://bit.ly/3AAEgDN)

[matthew@estateagencyrecruiters.com](mailto:matthew@estateagencyrecruiters.com)

**Derek Gardner 07834 303460**

LinkedIn [bit.ly/3P9CiON](https://bit.ly/3P9CiON)

[derek@estateagencyrecruiters.com](mailto:derek@estateagencyrecruiters.com)