



## **Job description**

### ***Personal Assistant / Customer Relationship Manager***

#### Objective

(You should share your mission statement with your assistant and build their objective around them helping you to achieve your objective)

#### Major tasks

1. Organise
  - a. Develop a system for the processing of all work. Checklists & kits for items that are needed repeatedly are to be developed and kept up to date so that work may be delegated with ease at any time
  - b. Schedule of work (When, where and how work will be performed)
  - c. Maintain supplies of stationery and forms
  - d. Organise and maintain clean pleasant work space
  - e. Develop and maintain filing system
  - f. Maintain petty cash and associated records
2. Prospect
  - a. Develop & maintain salesperson's personal profile
  - b. Develop with agent a marketing plan
  - c. Plan and organise mail outs
  - d. Write/source editorials
  - e. Arrange quotes as required for marketing material
  - f. Organise distribution of marketing materials
  - g. Telemarketing
  - h. Record responses to marketing
  - i. Arrange/distribute 'just listed' and 'just sold' cards
  - j. Organise and assist in writing seller's newsletter
  - k. Source listings from own sphere of influence
  - l. Develop/maintain/distribute pre-listing package
  - m. Prepare & maintain listing kit
3. Research
  - a. Research market facts as required
  - b. Source data for CMA's
  - c. Monitor sales and listing information on areas of influence
  - d. Monitor local press
  - e. Monitor key performance indicators as required for discussion at monthly team meetings
4. Database
  - a. Develop database
  - b. Maintain database

- c. Develop, in consultation with agent, activity plans, marketing plans and correspondence
  - d. Send material to database
  - e. Monitor responses
  - f. Back-up files on a regular basis and arrange with agent appropriate storage of back-up disks off-site
5. Process Listings
- a. Notify office of listing
  - b. Prepare window card
  - c. Prepare brochure
  - d. File listing authorities & other relevant documentation
  - e. Write standard letters to seller (as per activity plan)
  - f. Confirm Open Home details with sellers
  - g. Arrange key cutting
  - h. Prepare/arrange contract of sale and other relevant documentation
  - i. Advise others in the office of changes to listing details when necessary
6. Co-ordinate Property Marketing
- a. Confirm marketing plan with agent
  - b. Send copy to seller along with receipt for monies paid in advance
  - c. Book advertising
  - d. Book photographer
  - e. Organise/put up sign
  - f. Assist in production of advertising copy
  - g. Assist in production of editorials
  - h. Produce floor plans of properties
  - i. Ensure timely delivery of advertising or editorial material
  - j. Monitor advertising
  - k. Send copy of advertising to sellers
  - l. Invoice sellers for any outstanding amounts of money
  - m. Ensure materials prepared for Open Homes
7. Handle telephone traffic
- a. Ensure that all telephone calls are handled promptly and courteously
  - b. Solve as many problems as possible for people on the spot (rather than simply report them)
  - c. Return calls promptly
  - d. Advise agent when urgency is required
  - e. Be discrete in what is said to people over the phone
  - f. Maintain a message system for agent
  - g. 'Insulate' agent from unnecessary calls
  - h. Assist agent to avoid interruptions during "block-out" time
  - i. Make follow-up and routine calls as necessary
8. Process correspondence
- a. Develop standard correspondence, mail and email
  - b. Develop file name protocols for standard correspondence for ease of identification
  - c. Send correspondence as necessary
  - d. Develop email signature/s for Agent
9. Process sales documentation
- a. Advise office of sale details
  - b. Send copies of contracts as required
  - c. Arrange for 'sold' sign

- d. Follow up items required under the contract of sale (pest inspection, building inspection, finance etc.) including meeting people at the property, as necessary
- e. Write to seller (What happens next & what not to forget info)
- f. Write to buyer (Welcome to the area & what happens next info)

10. Organise settlement processes

- a. Ensure keys (& other security access as appropriate) are ready at settlement time
- b. Check with buyer and seller to ensure they have the information that they need for a smooth settlement
- c. Arrange gift at settlement
- d. Place new buyer and seller details on database
- e. Arrange removal of sign

11. Internet marketing

- a. Develop and maintain agents personal web site/s
- b. Develop and maintain email database
- c. Develop and maintain email newsletter

12. Personal organisation

- a. Personal support tasks as required including:
- b. Banking
- c. Car washing/cleaning
- d. Dry cleaning
- e. Lunch
- f. Arranging gifts, thank you notes and flowers
- g. Encourage agent to have time out (before it is necessary)