

<b>PROFESSIONAL &amp; BUSINESS DEVELOPMENT COMMITTEE REPORT</b> <b>2014</b>
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**Prepared For:** *BOARD OF DIRECTORS*  
**From:** Professional & Business Development Primary Committee (PBD)  
**Chairman:** Lori Doerfler  
**Vice Chairman:** Gary Nelson  
**Staff Liaison:** Barb Freestone  
**Date:** March 11, 2014

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*REALTOR®... the best prepared real estate practitioner with the highest standards.*

**CURRENT TOP PRIORITIES**

*GRI monitoring*  
*Continue to finetune the Remote Live Broadcasting Class*  
*Submit AAR and REBAC courses to ADRE for c/e approval*  
 MRE Society – promotion and processing  
 Spring Conference – *promote and implement*  
 Implement new digital platform for AZQ – combine Risk Management Broker/Manager Update and AZQ  
 Converting MyBrokerCoach to Learning Library platform  
 Discussion of feasibility of creating a leadership development program  
 Broker University – identify direction for 2014 activities

**RECOMMENDATIONS**

**None at this time**

**GROUPS FORMED**

- GRI Oversight Workgroup (Stacey Onnen)
- Spring Conference Planning Workgroup (Beth Adams)
- Broker University (Holly Eslinger)
- Leadership Development (Holly Mabery)

**Measureable Objectives Update**

**Support & Resources**

<b>Measurable objectives</b>	<b>Status</b>
Resources and tools are available to develop, offer, market or communicate programs and products within this business plan.	
Appropriate groups are updated and provided information throughout the year.	
Emerging technology, medias and platforms are used, where appropriate, to deliver products and services to members throughout the state.	GoToWebinar – Dodd Frank – March 12 Learning Library – GRI Business Planning online course
Staff continually develops the needed knowledge and skills to develop educational	Worked with Sue Flucke to develop Anatomy of the Lease Agreement

programs/products that are responsive to member needs and changes in the industry	class. In the process of developing an advanced Property Management Bootcamp
An effective and efficient learning management system is utilized to develop and host AAR's online education.	Partnered with NAR's Learning Library to convert MyBrokerCoach and develop online versions of the Broker Management Clinics
Opportunities are identified and utilized to partner with allied groups or vendors when appropriate	

### **Broker University**

<b>Measurable objectives</b>	<b>Status</b>
Programs and services are developed and/or offered to brokerages/owners which focus on operating a successful brokerage and/or managing risk.	Survey conducted in March
Partnership opportunities are explored that bring quality programs to our brokers when partnering is more advantageous than developing.	
Communication strategies and tools are employed to build broker support and awareness of programs, products and resources available to them	Facebook ad for MyBrokerCoach ran for two weeks (reached 16,500; 222 clicks)
A blended learning program, MyBrokerCoach is offered to develop or enhance brokers skills in operating a successful real estate brokerage.	Completed
Broker satisfaction with broker-related services are monitored and measured.	
A dedicated "broker" page is available on the AAR website and continually updated to address the needs of the brokers.	In process of reviewing and developing recommendations

<b>rCRMS (Certified Risk Management Specialist) Measurable objectives</b>	<b>Status</b>
The risk management certification program (rCRMS) focuses on state specific issues and is offered and available to members throughout the state where feasible.	<ul style="list-style-type: none"> <li>• Federal Legal Issues – Scottsdale, Jan 16 (22 attended)</li> <li>• Federal Legal Issues - WeMAR, Jan 24 (34 attended)</li> <li>• Leasing Essentials – West USA Realty, Jan 31 (41 attended)</li> <li>• Federal Legal Issues – AAR, Feb 18 (15 attended)</li> </ul>
A cadre of qualified instructors to deliver the rCRMS courses is maintained and monitored.	On-going Frank Dickens, Sue Flucke, Mary Frances Coleman, Rick Mack, Denise Holliday
Members are aware of the value of the rCRMS program through key “WIIFM” messages.	
A variety of marketing materials are developed and utilized to promote the rCRMS program.	
Newly certified members are recognized through appropriate AAR vehicles.	
Options to create online delivery of the rCRMS program is explored and developed where feasible	Currently approved for remote delivery CRMS Employment, Agency & The Standards of Care CRMS: Essential Skills for a Successful Closing. CRMS: Disclosure & Due Diligence. CRMS: Federal Legal Issues. CRMS: Claims & Remedies.

### Education Outreach

<b>Measurable objectives</b>	<b>Status</b>
Partnership opportunities are provided to local associations to offer REBAC designation and certification courses to members in a favorable financial environment.	Partnerships formed to date with: <ul style="list-style-type: none"> <li>• SEVRAR</li> <li>• Scottsdale</li> <li>• Bullhead City</li> <li>• WEMAR</li> <li>• West USA</li> </ul> Revenue share/subsidy to date: <ul style="list-style-type: none"> <li>• Scottsdale: \$450 (also - subsidized \$115 loss for SRES class)</li> <li>• SEVRAR: (\$616)</li> <li>• WEMAR: (\$824)</li> <li>• West USA:</li> </ul> Subsidized ABR loss in BHC
Educational programs are offered that address the needs of the members in helping them grow	SEVRAR <ul style="list-style-type: none"> <li>• 3P's of Broker Audits – Jan 13 (86</li> </ul>

their business and prepare for changing trends in the industry.	<p>attended) Scottsdale</p> <ul style="list-style-type: none"> <li>• SRES – Jan 30/31 (17 attended)</li> <li>• MRP – Feb 6, (15 attended)</li> </ul> <p>AAR</p> <ul style="list-style-type: none"> <li>• RSPS – Feb 4, (14 attended + 8 at remote locations)</li> <li>• BPO – Feb 28, (Cancelled) Bullhead City</li> <li>• ABR – Feb 5/6, (10 attended)</li> </ul>
A forum for local education staff and ADRE (updates and Q&A on school process, policies, and guidelines) is provided.	
Effective communication strategies are developed and utilized to inform members of educational opportunities, including a calendar that is accessible 24/7.	Ongoing – calendar AAR present at Eagle University and Coldwell Banker Quarterly event
Resources are available to local education staff and volunteers charged with overseeing or developing their education endeavors.	
Cross marketing strategies are utilized to promote designation and certification courses where appropriate.	e-blast marketing include a list of upcoming classes
A list of colleges is compiled that offer real estate degrees in Arizona.	

### ***Education Development***

<b>Measurable objectives</b>	<b>Status</b>
Established quality standards are followed in developing curriculum for all AAR education programs to help set the bar for excellence in education.	Utilizing Course Certification criteria as a checklist when developing or revising courses
The spectrum of delivery systems is broadened and monitored to deliver education to the members.	<p>Classes approved to date for remote delivery include:</p> <ul style="list-style-type: none"> <li>• CRMS Employment, Agency &amp; The Standards of Care</li> <li>• CRMS: Essential Skills for a Successful Closing.</li> <li>• CRMS: Disclosure &amp; Due Diligence.</li> <li>• Federal Legal Issues.</li> <li>• Claims &amp; Remedies.</li> <li>• Contracts, Clauses &amp; Contingencies.</li> <li>• What your buyer doesn't know can hurt you</li> <li>• BMC #1 Statute &amp; Rules</li> <li>• BMC #2 Broker Policies</li> <li>• BMC #3 Supervision</li> <li>• Gen Buy</li> <li>• Practical Side of Fair Housing</li> </ul>
Remote-delivery classroom volunteer monitors and instructors are trained in the chosen AAR platform.	Testing conducted over the last two months

<p>A library of AAR c/e courses which can be delivered live or remote is developed, monitored and maintained.</p>	<ul style="list-style-type: none"> <li>• BMC 1,2 and 3</li> <li>• Sticky Situations</li> <li>• Real Sticky Situation</li> <li>• Contacts Clauses &amp; Contingencies</li> <li>• A Practical Guide to Fair Housing</li> <li>• Anatomy of a Lease Agreement</li> <li>• Do It Right or Get Out of Property Management</li> <li>• Risky Business</li> <li>• What Your Buyer Doesn't Know Can Hurt You</li> </ul>
<p>A vehicle is used, available and monitored for members to review and comment on instructors and courses.</p>	<p>REteach.us</p>
<p>Emerging education trends are monitored throughout the year and programs developed which are responsive to the changing industry and needs of members.</p>	
<p>Trends (content and delivery platforms) are closely monitored to ensure AAR utilizes the most effective delivery systems and technologies..</p>	
<p>Assistance is available, when appropriate, to help enhance prelicensing and postlicensing curriculum criteria and/or the ADRE processes.</p>	
<p>Tools or resources are available to help members assess their own skills and identify where they need to hone their skills and knowledge</p>	

### Instructor Development

<p><b>Measurable objectives</b></p>	<p><b>Status</b></p>
<p>Opportunities are available for instructors to communicate and share with each other</p>	<p>Proposed Contract IDW to be presented to PBD Committee in March</p>
<p>AAR qualifies all its instructors against established instructor criteria and offers an Instructor Certification Program to all instructors who desire to earn the certification</p>	<p>On-going</p>
<p>Opportunities are available for instructors to examine their subject knowledge through self-assessment tools.</p>	
<p>Incentives are offered, where applicable, to encourage local associations to engage ME certified instructors when offering AAR courses.</p>	

### ***Industry Partners Conference***

<b>Measurable objectives</b>	<b>Status</b>
An educational program, through partnership program with AMLA and ASEA, is offered to help members understand each others role in the real estate transaction.	Planning will begin in April
The Industry Partners Conference is evaluated annually to ensure it meets the needs of our members.	

### ***Leadership Training & Development***

<b>Measurable objectives</b>	<b>Status</b>
AAR celebrates the accomplishment of outgoing president and installs incoming officers at the annual Leadership Conference.	
Training is available to prepare incoming leaders to fulfill their incoming leadership roles.	
Members are aware of opportunities to serve in leadership and committees within AAR.	
Opportunities for volunteer leaders to network with each other are available to state and local leadership.	
Resources are compiled and available to assist or develop future leaders.	
The feasibility of offering the LTA or a portion of the LTA program is studied and implemented (if determined it is wanted).	Work Group in process – anticipate recommendation coming

### ***MRE Society***

<b>Measurable objectives</b>	<b>Status</b>
A tool is available and used to recognize members lifelong learning commitment through their educational accomplishments 1	Marketing efforts consisted of: 7 e-blasts sent to expiring members, New GRI designees, and all of AAR's membership Number of applications received to date: 41
A program or resources are identified and/or developed to help facilitate career growth/path for new members or members looking to take their career to the next level	Brainstorming to begin in April.
Input from MRE Society members is solicited and reviewed annually regarding the value of the program..	Annual MRE survey planned for September.

### ***Member Communication***

<b>Measurable objectives</b>	<b>Status</b>
Pertinent, relevant and timely industry and association information is broadcast to member utilizing all methods of electronic/print/media delivery (i.e., social networks, e-publishing, website, video, newsletters or magazine, etc).	AAR currently disseminates information via the following channels: Website, Social media channels, monthly e-Magazine, Quarterly e-Blast to Brokers, and the AAR blog.
Trends inside and outside of the real estate industry are monitored throughout the year.	Currently working on stories related to "How to retire?", "Impact of Biggert Waters". Ron

	LaMee and Nicole LaSlavic will now be contributing articles on RAPAC and Market Trends to the AZR.
Members are aware of AAR's value proposition and relevancy to their business practice through key WIIFM messages in AAR's communication strategies.	AAR is focusing this year on expanding the exposure of our volunteers through a monthly Volunteer Spotlight series. To date, we've interviewed Kent Simpson and Bob Hertzog.
Opportunities are available for members to share their insights and engage with content through comments polls, contests, etc.	<p>Polls are currently active on AAR's site, as are social social sharing buttons on the website. Comments are open on most AAR articles (excluding legal) and on most blog posts.</p> <p>Recent polls include:</p> <ul style="list-style-type: none"> <li>• What is the most important quality you look for in an instructor</li> <li>• Do you understand the new Dodd-Frank Wall Street Reform and consumer Protection Act (23 responses)</li> <li>• How long have you been a REALTOR (110 responses)</li> </ul>
Communications vehicles are closely monitored evaluated and evolve as needed.	Recently, AAR reached out to Risk Management committee to combine the Broker Manager Risk Management emails with the Arizona REALTOR® Quarterly. Reducing duplication and strengthening the messages
Options are explored to identify members preferred communication methods and steps taken to delivery information the way members want to receive it.	AAR's last communications survey was in July 2013. In 2014, AAR will be working with nSight marketing to audit our communications vehicles. First meeting with Mission:Connect 2/28/2014
Communication briefs for each of AAR's communication vehicles are maintained and evaluated annually.	<p>Communications briefs exist for the following communications vehicles: Arizona REALTOR® magazine, Arizona Broker/Manager Quarterly, Website, Twitter, Facebook, Blog.</p> <p>Utilizing the Mission:Connect project to update and analyze communications briefs.</p> <p>Communication briefs in place for the following AAR vehicles: Blog, twitter, facebook, AZR, website</p>
Social media channels are managed and monitored to ensure a steady rise in engagement and alternate sources for members to receive information.	<p>AAR uses a combination of Hootsuite and Google Alerts to monitor AAR's social media channels. AAR continues to see a rise in followers within its social media channels. As of 2/24/2014, AAR's social media stats are:</p> <ul style="list-style-type: none"> <li>Facebook: 5,664 followers</li> <li>Twitter: 5,717 followers</li> <li>Google+: 149 Circle Followers</li> <li>Linkedin: 855 followers</li> <li>YouTube: 179 subscribers</li> </ul>
A modern, functional website which provides information and resources to members 24/7 is maintained and enhanced as needs expand and technology evolves.	AAR's website received 87,834 unique pageviews in January 2014. We are currently in the testing phases of a beta opt-in functionality that would allow users to opt in to the following content types: 1. Business Tools + zipForm, 2. Business

	Tools + eSign, 3. Forms + Addendum, 4. Contract + Residential Lease, 5. Forms +Landlord Tenant, 6. Legal Articles +Landlord Tenant, 7. Legal Articles + New Forms, 8. Legal Articles + Contracts, 9. Buyer Advisory + Buyer Advisory, 10 . Sample Forms + New Forms
Print and digital collateral adheres to the AAR brand and is member centric and speaks to AAR's value proposition.	AAR currently employs a brand/graphics standards manual and implements the structure within all AAR print and digital collateral. Recent collateral pieces are the new GRI brochure and the Member Benefits brochure (in development)
The use of video communication is expanded.	Utilized video for President's Quarterly Message; Ask Scott.
Communication statistics are compiled and reviewed monthly.	<p>January Stats   Web</p> <ul style="list-style-type: none"> <li>• Unique Visits: 19,253</li> <li>• Unique Page Views: 87,834</li> </ul> <p>January Stats   Arizona REALTOR® Magazine</p> <ul style="list-style-type: none"> <li>• Opens: 17,827 (33.59%)</li> <li>• Click-Throughs: 2,804 (9.63%)</li> </ul> <p>January Stats   Blog</p> <ul style="list-style-type: none"> <li>• Unique Visits: 2,597</li> <li>• Page Views: 4,344</li> </ul>
Development of a mobile app is researched and developed, if desirability is identified.	Reached out to mobimanager to see if AAR could use an existing credit to create an AAR app. Waiting on contract language from mobiManager before we proceed.
Marketing collateral is available and used to promote AAR programs, products and services, where appropriate.	AAR currently uses many types of marketing collateral to promote services, products and events. The most commonly used print collateral includes class flyers and designation information that is distributed at industry events. AAR is currently developing collateral to support the upcoming Spring Convention.
Workgroups, task forces, and/or advisory groups are utilized to shape and enhance AAR's communications efforts	Reached out to communications workgroup for story sources and ideas for upcoming issue.

### REALTOR Institute: GRI Designation

Measurable objectives	Status
The GRI program is available to members throughout the state.	<p>10 associations offering live GRI classes</p> <p>8 associations offering classes via live remote feed</p> <p>1 firm offered GRI (Prudential)</p> <p>52 GRI classes scheduled in 2014</p>
Partnership opportunities are available to local associations and firms who wish to deliver the GRI courses to their members.	<p>8 associations offering classes via live remote feed</p> <p>10 associations offering live GRI cases</p> <p>1 firms sponsored a class</p>
The program is evaluated for effectiveness,	Ongoing review of course



structure and format to ensure it offers unsurpassed curriculum and meets the needs of our members.	evaluations and feedback from students.
The new GRI program is rolled out in 2014 and continually evaluated and updated to be responsive to the changing industry and needs of our members.	On-going January classes: <ul style="list-style-type: none"> <li>• rCRMS Fed Legal Issues – 13 GRI credit</li> <li>• rCRMS Fed Legal Issues – 29 GRI credit</li> <li>• SRES – 4 GRI credit</li> </ul> February classes <ul style="list-style-type: none"> <li>• RSPS – 3 GRI credit</li> <li>• ABR – 6 GRI credit</li> <li>• MRP – 0 GRI credit</li> <li>• rCRMS Fed Legal Issues – 10 GRI credit</li> </ul>
The GRI program incorporates introductory designation and certification courses into the curriculum where appropriate.	rCRMS and REBAC classes approved for GRI credit
A cadre of qualified instructors who meet the established GRI instructor criteria and AAR Instructor certification standards are maintained and monitored.	On going 21 instructors Two new instructors approved in February
Communication platforms and tools are used to inform members of the GRI program and its benefits to building a successful career.	GRI Facebook page GRI Website E-blasts about the program
Outreach efforts are employed to build broker support of the GRI program.	Eblast to Brokers about scholarship (19% open (445); 1.2% click thru (28)
Resources are available to provider-partners to help to deliver and promote the courses.	GRI videos available to providers Flyer templates available to providers Series of ads available to providers
New designees are recognized where appropriate and provided resources to help them promote their accomplishment.	New designees are announced on GRI facebook group as well as the GRI webpage. List of new designees also sent to local association AE's and presidents
Proactive efforts are made to work toward developing/offering more online options for earning the GRI designation.	The NAR designation/certification courses that are approved for GRI credit are offered online Arizona's business planning module is offered online
A financial scholarship program is available to members and evaluated annually	39 scholarships have been disbursed for the 1 <sup>st</sup> Quarter (1 <sup>st</sup> quarter 2014 form emailed on 12/2/2013 and closed on 12/31/2013) 2 <sup>nd</sup> Quarter Scholarship closed (opened 3/3 and closed 3/5)  The GRI Get Smart Sweepstakes runs through March 31st: \$2,000 in fund. Winners will be announced

	<p>on April 1<sup>st</sup>. 9 applications received to date (Prize: AAR pays for the remaining 2014 GRI class) (eblast stats: 40% open rate/4% click thru rate)</p> <p>Eblast to brokers promoting the Scholarship and encouraging them to promote to their agents (e-blast stats: 19% open rate/1.2% click thru rate)</p>
Advanced tools and processes are utilized to ensure administration of the program is streamlined and efficient.	Ongoing
Curriculum development and maintenance adhere established curriculum standards.	<p>Most of the course curriculum has been rewritten and field tested in the fall of 2013.</p> <p>Ongoing review of course evaluations and feedback from students</p>
National trends in each state's GRI programs are monitored to keep AAR's GRI program growing and evolving.	On-going

### ***Spring Convention***

<b>Measurable objectives</b>	<b>Status</b>
A statewide conference is offered that explores the challenges of the current market and provides information on best practices to help members learn how to adapt and succeed as well as networking opportunities and information exchange	<p>April 15-18, 2014 165 registered as of 3/10/14 8 confirmed vendors as of 3/10/14</p> <p>Weekly eblasts sent to targeted areas Past attendee eblast: 29% open rate/.6% click thru Full membership eblast: 27% open rate/1.49% click thru PAAR members only: 26% open rate/1.2 click thru</p> <p>Local Associations have been asked to assist in marketing to their members</p>
Cutting-edge and emerging technologies are incorporated into the program and marketing efforts where possible.	
Positive feedback is received.	