

2018 PBD Measureable Objective Update

From: Professional and Business Development (PBD) Committee
Chair: Susan Slattery
Staff Liaison: Barb Freestone
Date: September 14, 2018

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The following are programs, products, services and activities (PPSA's) with Professional and Business Development oversight.

Current Top Priorities

- Leadership Conference
- Instructor Development – October 3
- Broker Summit – October 15
- 2019 Convention Planning
- 2019 Education class scheduling
- MRES Society Membership Drive
- GRI course curriculum review

Recommendations

- None at this time

Groups Formed

- GRI Oversight Workgroup – Sindy Ready
- Broker University Workgroup – Keri Means
- CRPM Advisory Workgroup – Sue Flucke
- 2018 Convention Planning – James Adams

Program, Product, Service or Activity (PPSA):

Broker University

This program involves:

- *Broker Summit*
- *Broker Management Clinic classes*
- *Mack In A Minute video series*
- *Broker Brief webinars*
- *Branch Manager resources*

Measurable objectives	
Design and deliver a broker summit that addresses the needs of the diverse brokerage community.	October 3 ADRE Update – Commissioner Lowe Legal Update – Scott Drucker/ Nikki Salgat Cybersecurity Panel Broker Panel – open Q&A
Develop, partner and/or provide programs that focus on broker and operational competencies.	Florida Association discontinued Operations webinar series Researching CRB program feasibility – affordability & interest
Communicate educational opportunities to brokers with messages that demonstrate the value of the programs to the broker and their agents.	Contract Conversation, Mack In Minute information included in 2 nd and 3 rd Quarterly Broker/Manager Newsletter
Student feedback is favorable regarding quality and relevance	
Redesign and deliver engaging and practical-based Broker Management Clinics	BMC 2 and 3 held during the AAR convention Broker University Workgroup agenda item.
Maintain, and update as needed, a Broker University webpage that compiles professional development resources:	Ongoing Workgroup in process of recommending ta Broker button on AAR’s homepage o Risk Management & BS&T
Provide opportunities for brokers/managers to stay abreast of issues, trends and AAR activities delivered through timely webinars and videos.	Broker Brief Webinars – 2018 Tax webinar held in August Contract Conversation and Mack In a Minute videos
Explore and engage in opportunities to provide professional development programs or resources to branch managers.	Forwarded recommendation to BS&T to include article or links of interest to Branch Managers in periodic Voice issues.
Continue to produce and distribute the Mack In A Minute video series.	On-going. Mack In a Minute videos are sent out via email to brokers/managers the first Monday of every month. Archived videos are housed on AARonline.com/Increase-Knowledge

Identify the needs of the diverse brokerages for use in developing professional development programs.	
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Program, Product, Service or Activity (PPSA):

rCRMS (Certified Risk Management Specialist)

This program involves:

- rCRMS Program development, administration, delivery and marketing

Measurable objectives	
Members will have access to rCRMS classes offered in partnership and live streamed at a competitive and affordable price	<p>24classes (live and live-streamed) scheduled to date in partnership with local associations</p> <p>January Federal Legal Issues – 46 attendees January Essential Skills – 25 attendees February Disclosure – 32 Attendees February Res Contract – 20 Attended March Agency (Remote) – 42 Attended April Disclosure – 17 Attended April Agency- 22 Attended April Essential Skills – 41 Attended May Disclosure (Remote) – 36 Attended June Essential Skills – 54 Attended June Federal Legal – 63 Attended July Res Contract (Remote) – 65 Attended August Agency – 38 attended August Leasing Essentials – 37 attended August Contract – 47 attended</p>
Monitor and update curriculum as needed.	On-going
Explore opportunities to incorporate or increase engagement activities into the curriculum.	On-going
Maintain and monitor a cadre of qualified instructors	On-going

Provide an easy to find master calendar and path earn the certification on rCRMS webpage	Done
Maintain a dedicated instructor page to house course materials.	Done (password protected)
Offer rCRMS certification holders discounted class registration fees.	Registration fee discounted by \$25 for current rCRMS Cert holders
Employ communication strategies to market upcoming courses and program value, including social media and video.	Inventory of instructor invitation videos will be conducted and reviewed by the end of March to identify needed updates
Recognize newly certified members on CRMS webpage, AAR Facebook page and announced to local associations.	Ongoing January – 1 Graduate February – 5 Graduates March - 6 Graduates April – 8 Graduates June – 1 Graduate

Program, Product, Service or Activity (PPSA):

Education Outreach

This program involves:

1. Delivery, admin and resources for live and live-streamed REBAC classes
2. Live-streamed c/e classes
3. Annual Trends Summit
4. Development of micro-learning segments
5. New agent resource

Measurable objectives	
AAR will engage instructors who have practitioner experience in the topic area and who adapt to learner-centered teaching with preference given to instructors who assist in marketing effort requests.	On-going Three new instructors added to the live streamed cadre
Provide partnership and revenue share opportunities to local associations, brokerages and NARPM who want to offer REBAC and AAR classes.	12 local associations participating in the AAR live streamed courses 3 local associations offering REBAC classes through AAR partnership 3 firms offering AAR c/e classes in through AAR
Live Stream one day of c/e classes with local associations each month.	Courses scheduled, instructors booked January CE class – 150 students

	<p>February CE Class – 53 Students March CE Class – 51 Students April CE Class – 35 Students (May CE Class cancelled) June CE Class – 65 Students July CE Class – 56 Students August CE Class – 82 Students</p>
<p>Collaborate with instructors to identify how to incorporate (or increase) engagement/ activities into the curriculum they teach.</p>	<p>Workshop held to teach Kahoot platform to instructors</p> <p>Library containing short videos in development highlighting engagement activities</p>
<p>Members will have access to education programs offered through AAR at a competitive and affordable price.</p>	<p>Completed</p> <p>3 hour c/e registration fees set at \$20</p> <p>3 hour CRPM registration fee set at \$25</p> <p>6 hour CRPM course registration fee set at \$79</p> <p>6-hour REBAC registration fee set at \$59</p> <p>6 hour rCRMS course registration fee set at \$59 (registration for live streaming set at \$49)</p> <p>12 hour rCRMS course registration fee set at \$79</p>
<p>AAR will provide local associations with an Education Chairman’s manual and Live Streaming Administrative Guide.</p>	<p>Completed</p>
<p>Deliver an Annual Trends Summit featuring national speakers for changing trends and business practices in the industry.</p>	<p>Target: December</p>
<p>Assist instructors who meet AAR’s criteria, in obtaining approval to teach REBAC classes</p>	<p>New REBAC instructor Mandy Neat</p>
<p>Grow the cadre of well-trained live streaming instructors.</p>	<p>New instructors added to the live streaming cadre for 2018 include: Jesi Wolnik, Jimmy V, Patrick Ritchie, Melinda Eslinger</p>
<p>Engage in opportunities to provide new agent resources/training opportunities.</p>	<p>Partnership with the Paperless Agent to provide monthly webinar series and online coaching geared for members in the business 5 years or less</p>

	Training topics include: lead generation, marketing, branding, listing appointments, buyer tours, sales mastery, technology, social media
Research education needs within the commercial membership segment and identify what AAR's role should be.	
Explore opportunities to take current content and convert into micro-learning training.	Ongoing

Program, Product, Service or Activity (PPSA):

Education Development

This program involves:

- *Resources, reference material and training expenses to stay abreast of education trends and technologies*
- *Course development/updates*
- *Contract Conversation videos*

Measurable objectives	
Maintain and update learning management platform license.	Completed
Monitor and enhance live streaming platform to continually provide an effective learning experience and adhere to ADRE regulations.	Upgraded TV monitor for Instructor's view in December 3 new laptops for host classroom Conference call with remote site AE's held Meeting and Host Classroom tour held with AE's in August
Explore gamification opportunities that can be incorporated into education programs.	Instructor workshop held in March on Kahoot October IDW focuses on engagement activities
Staff has access to the necessary curriculum development and delivery resources to develop quality programs	On-going Staff attended Training Magazine conference in February
Explore development of a professionalism certification program or research/license available programs when that is more feasible.	Committee defined professionalism as: Attitude, how one carries and conducts him/herself

	<p>Committee identified key attributes of a professional:</p> <ul style="list-style-type: none"> • Responsive • Transparent • Ethical • Honest • Knowledgeable • Open minded • Fair • Positive perspective • Level-headed • Problem solver • Educated • Excellent communication skills • Reputation
Produce a minimum of 4 Contract Conversation videos.	Planning stages for a video featuring Jan Leighton and the AAR Land Purchase Contract
Research and evaluate how an immersive learning experience can be incorporated into AAR's programs.	
Explore possibility of developing or making available retirement workshops, videos or resources for members.	<p>NAR's retirement class, "Building Wealth, Representing Investors, and Becoming One Yourself" offered at the Convention</p> <p>Information regarding NAR's Financial Wellness to be distributed at upcoming events</p>

Program, Product, Service or Activity (PPSA):

Instructor Development

This program involves:

- *Instructor Development programs and opportunities*
- *Attendance at trainer conference*
- *Research and Resources (training/subscriptions) to share, incorporate and monitor presentation trends*

- *Video production*
- *Uniform Instructor Standards*

Measurable objectives	
Provide AAR instructors with opportunities to continually grow their skills and understanding of the needs of the modern learner.	December 2017 webinar: Look Who's Talking - Classroom Management IDW – January 19 with Len Elder (26 attended) IDW and Instructor Forum scheduled for October 3
Provide resources and guidance to new instructors coming into AAR cadre.	Classroom Management videos will be available by the end of the year Gary Nelson and Mandy Neat completed the Bob Pike Trainer Bootcamp in December
Provide training and resources to AAR's instructors who teach AAR's live streaming classes.	Instructor Tip Sheet in development
Develop teaching tip/best practice video snippets for GRI classes.	Snippits developed to date include: <ul style="list-style-type: none"> • Effective Strategies • GRi Technology • GRI Market Essentials
Monitor emerging trends in instructor skills which can aid instructors in enhancing their skills. (share distribute with PBD and instructors)	ongoing
Develop and provide materials to instructors to promote professionalism at every education opportunity	On-going
Utilize Instructor Standards to guide and strengthen instructor quality and performance.	On-going
Provide one scholarship to the Bob Pike Train the Trainer for one new AAR instructor who could benefit from the program.	Completed – Mandy Neat attended program in January

Program, Product, Service or Activity (PPSA):

Industry Partners Conference

This program involves:

- Partnership role in planning, presenting and administering the annual Partners Conference

Measurable objectives	
Participate as a partner with AMLA and ASEA, to offer a program designed to help members understand each other's role in the real estate transaction.	September 14, 2018 As of 9/13/18 – 322 Registrations
Positive feedback is received to ensure it meets the needs of our members.	Excellent - 66 Good - 32 Fair – 3 100% of surveys filled out indicated they learned something that will help with their business or clarify transaction issues (note: the attendees who rated the conference as fair (3) also indicated they learned something that will help with their business or clarify transaction issues.

Program, Product, Service or Activity (PPSA):

Leadership Training & Development

This program involves:

- Annual Leadership Conference
- LTA program
- The Art of Leadership Webinar series
- Leadership Workshop

Measurable objectives	
Offer an annual conference for incoming leadership and members who wish to become leaders.	October 15-17, 2018
Program feedback received is favorable regarding quality and relevance.	Excellent feedback from LTA sessions

Offer a leadership development program (LTA) specifically for incoming local association presidents-elect.	LTA dates: April 18-19; May 31-June1; July 10-11, August 20-21 13 local associations represented in this year's LTA program
Develop and offer educational events, classes and opportunities to enhance leadership skills.	<p>Storytelling Workshop – January 22, 2018 with Karel Murray -7 attendees</p> <p>Art of Leadership 5-Part Webinar Series focusing on Influence – January 17, 24, 31, February 7, 14. (Marketing target: brokers/Managers) (22 registered/4-6 average attendees)</p> <p>In discussion with AMLA and Jeff Richards to present John Maxwell's Live2Lead program in early February 2019</p>

Program, Product, Service or Activity (PPSA):

MRES Society

This program involves:

- Administration and marketing of MRES program
- New agent training/resources
- Education program for MRES Society members
- Communication efforts emphasizing value of education/learning
- Video production
- Development of learning path resources

Measurable objectives	
Recognize members' lifelong learning commitment through a membership-based program connected to educational accomplishments	<p>MRES Society membership</p> <p>2018-2019 Term: New: 28 Renewing: 13 Gold: 10</p>
Distribute MRES Society information through eblasts and social media channels	<p>Facebook ad scheduled for Fall</p> <p>Eblast sent to membership in October 2017 and December 2017 (average open rate 22%)</p>
Increase MRES Society membership by 10%.	

Develop a strategy to create topical learning paths/infographics to assist new agent or members looking to take their career to the next level.	On hold – waiting to review NAR’s Commitment to Excellence program
Produce a minimum of 4 videos featuring members discussing the impact education courses had on their business success. (minimum of 4)	
Provide MRES Society membership information to students in the GRI, rCRMS and CRPM classes (show them the path to the MRES Society membership and how the classes they are taking fit in)	On going
Solicit feedback from MRES members to evaluate membership value	Scheduled for the fall
Explore and implement, if feasible, a lifetime member Platinum level category.	PBD Committee approved new category, effective 2019
Provide MRES Society members with access to a special education program.	Done – webinar week to be scheduled for September-October

Program, Product, Service or Activity (PPSA):

Property Management Certification

This program involves:

- Administration, delivery and marketing of CRPM certification program
- Timely Webinars
- Property Management Summit

Measurable objectives	
Members will have access to property management classes and the CRPM certification program at competitive and affordable fees through partnership and live streaming.	24 classes scheduled to date live/live streamed in partnership with local associations and NARPM January PM Bootcamp – 42 attended January How to Evict Tenant c/e class – 71 attended February Acc FH/The Anatomy of AAR Lease Agreement (REMOTE) -79 Attended February Legal Hotline Issues – 40 Attended

	<p>February PM Adv Trust Accting – 50 Attended March PMBC – 34 Attended April Agency in PM – 45 Attended April PM NAR COE – 39 Attended April How to Evict/RLOPD Statement (REMOTE) – 101 Attended April Overview of PM Forms – 35 Attended May Legal Hotline Issues/PM NAR COE -56 Attended / 50 Attended May Adv PMBC (REMOTE) – 53 Attended May PM NAR COE – 31 Attended May PM The Rules – 46 Attended May PM NAR COE – 18 Attended June Adv PMBC – 45 Attended July Adv PMBC – 26 Attended July PM the Rules – 40 Attended July Agency in PM – 38 Attended August ARLTA (REMOTE) – 76 attended August Advanced PM Bootcamp – 29 attended</p>
Maintain a cadre of qualified instructors who meet the AAR adopted Instructor Standards and bring practical experience to the program	On-going
Receive favorable feedback regarding quality and relevance.	On-going. Favorable feedback received to date
Provide an easy to find master calendar and path earn the certification on CRPM webpage.	Course calendar on AAR website calendar and on the CRPM webpage
Offer timely webinars focusing on property management issues	2018 webinars tentatively scheduled for May, August and November
Offer a summit that addresses property management issues and topics.	
Communicate upcoming classes to members and target area utilizing eblasts, video and social media.	A monthly “Upcoming class” eblast is done monthly in addition to targeted eblasts
Announce and maintain a list of members who earned the CRPM certification.	On-going

Program, Product, Service or Activity (PPSA):

REALTOR Institute: GRI Designation

This program involves:

- Program administration and maintenance
- Curriculum maintenance and enhancements
- Education course for designees
- Dedicated website enhancements and maintenance
- Marketing collateral and strategies
- Scholarship program

Measurable objectives	
The GRI program is available and accessible to members throughout the state through live and live streamed classes.	Done 54 native GRI classes scheduled to date February Safe RE (Remote) – 76 Attended April Eff Strategies (Remote / Rescheduled for 6/27) June Mkt Essentials (Remote) – 65 Attended June Eff Strategies (Remote) – 56 Attended August Transaction Technology (Remote) – 47 attended
Partnerships are utilized to deliver GRI Classes	Partnerships with local associations - 9 local associations are offering GRI classes in 2018 1 firm offering GRI classes in 2018
Provide GRI designees with access to a special education program.	Webinar Summit targeted for the Fall
Communicate the value of the GRI program through eblasts, video, social media.	Facebook ads scheduled for April/July/October
Maintain and enhance the GRI website as needed	On-going
Evaluate the program annually to ensure it is responsive to the changing industry.	Survey sent to GRI candidates in August. 112 candidates' respondents (out of 400)
Student feedback is favorable regarding quality and relevance	On-going. To date, favorable class/instructor feedback received
Survey designees who earned the GRI designation to measure how and what they	Survey sent to GRI graduates in August. 53 respondents (out of 117).

implemented into their business practice as a result of what they learned in the GRI program	
Maintain, monitor and grow a cadre of qualified instructors who meet the established GRI instructor criteria, AAR Instructor standards and embrace learner-centered teaching styles.	1 new instructor added to the GRI Instructor Cadre to date.
Provide sufficient resources to update and refresh the Online Business Planning course	On-going
Marketing messages focus on the value/benefits - connection to building a successful career	On-going
Communication to Brokers emphasizes the value of the program brings to their agents' business success and available scholarships	Broker eblasts regarding scholarships
Provide GRI Administrative Guide to course providers.	Available on the GRI website-Admin portal
Recognize new designees through social media and announcements and provide resources to help them promote their accomplishment.	Ongoing 10 graduates in January 16 graduates in February 4 graduates in March 9 graduates in April 13 graduates in May 18 graduates in June 6 graduates in July
Provide a financial scholarship program to members.	\$15,000 approved I the 2018 budget 44 scholarships awarded in the 1 st quarter 67 scholarships awarded in the 2 nd quarter 60 scholarships awarded in the 3 rd quarter 4 th quarter request period opens on September 12th
Monitor national trends in the GRI programs to keep AAR's GRI program growing and evolving.	On-going
Monitor Student demographics.	2017 Profile completed in August Years in Business: 16% less than 1 year 35% 1-3 years 12% 4-6 years 14% 7-10 years 23% over 10 years

	<p>Age</p> <p>1% under 25 years old</p> <p>4% 25-34 years old</p> <p>27% 35-44 years old</p> <p>36% 45-54 years old</p> <p>33% over 55 years old</p> <p>Side note: 39% said someone encouraged them to start the program (61% said no)</p> <p>6% of members who earned the GRI designation between 2014-2017 are no longer in the business</p>
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Program, Product, Service or Activity (PPSA):

REALTOR Convention

This program involves planning, delivery and marketing of annual convention

Measurable objectives	
Offer a statewide conference that addresses the trends and 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.	<p>March 20-22, 2018</p> <p>Total pre-registered: 446 (includes all registration types)</p> <p>Total attended: 405</p> <p>DATE FOR 2019 (Scottsdale Plaza Resort) – March 25-28, 2019</p>
Feature national speakers to provide a broad scope in national business practices, trends and techniques.	Sean Carpenter, Jeff Chalmers, Maurice Hampton, Cheryl Knowlton, Gee Dunsten, Bill Lublin, Brian Copeland, Jaime Casup, Melisa Zimbleman
Provide retirement type session or workshop during convention	Offered NAR's Building Wealth-Investing class

Utilize a variety of marketing efforts to inform members of the convention and its value	Facebook ad in February, eblasts, video invitations from speakers drip campaign General membership eblast in January and February, targeted eblasts to GRI candidates, new members, past convention attendees and Valley members. Convention flyer sent to local associations encouraging their help in promoting to their members 2019 Convention Ad in 2 nd and 3 rd Quarter Broker Manager Newsletter Facebook ad in August
Positive feedback is received.	Done
Explore and evaluate areas/locations for convention in 2019	Done - Scottsdale

Program, Product, Service or Activity (PPSA):

Support & Resources

This program includes support programs including:

- Printing, copying and postage
- Committee, workgroup and task force support
- Reteach.us platform maintenance and enhancements
- Registration platform maintenance and enhancements
- Resources, tools, subscriptions and license fees for programs support activities
- Promotion and marketing efforts
- Video commercial production
- Program registration fee ETF expenses
- Conferences/training events

Measurable objectives	
Appropriate groups are formed and kept updated throughout the year.	On-going
Provide the necessary equipment, supplies, subscriptions, licenses and tools to implement	On-going

the business plans, host/house online program and registration functions	
Production and editing of video commercials emphasizing the value of lifelong learning.	
Participate in local association and firm events, where available to promote AAR's educational programs and resources	AAR table at Coldwell Banker's March event. Plans for AAR table at Coldwell Banker's June event
Review program messages and enhance where needed to connect message to business success.	Ongoing
Develop easy to follow paths to earn the rCRMS, CRPM and GRI using infographic format.	Rollout in October
Develop and distribute printed collateral at AAR and/or local events.	On-going
Work through appropriate committees to influence ADRE to permit C/E Credit for business-skill related topics	Opportunity not available to date
Promote the use of the Reteach.us site.	On-going. Information included in class materials and in student communications
Employ technologies and resources to create and retain a state of the art learning environment available to members.	On-going
Staff attends AAR, NAR and-Education-related conferences/forums.	Training Magazine Conference – February Digital Marketing Conference – February Social Media Marketing World Virtual Conference