Arizona REALTORS®
2019 PBD Measurable Objectives Update

From: **Professional and Business Development (PBD) Committee**
Chair: **Sindy Ready**
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REALTOR® - The best prepared real estate professional with the highest standards.

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

Current Top Priorities

- Convention –marketing
- 2019 Education Outreach – marketing
- MRES Society Membership Drive
- Task Force to develop REALTOR Value Proposition statements

Recommendations

- None at this time

Groups Formed

- GRI Oversight Workgroup – Marci Slater
- Broker University Workgroup –
- CRPM Advisory Workgroup –

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*

Measurable objectives	Status
Design and deliver a broker summit that addresses the needs of the diverse brokerage community	

Develop, partner and/or provide programs that focus on operational competencies.	
Programs receives a minimum of 80% attendee satisfaction.	
Design and deliver a communication campaign connecting the value of AAR's education programs to the broker and their agents.	
Offer a minimum of two Broker Management Clinics that incorporate practical based content.	
Produce and distribute a minimum of two webinars focusing on issues important to brokers.	February Tips for Dealing With HOA's March FEMA Flood Program Update
Develop and implement a drip campaign to increase awareness of the skill development/operational resources available to them.	
Continue to produce and distribute the Mack In A Minute video series.	Monthly releases – 1st Monday of each month to Broker/Legal Hotline distribution list
Develop a list of topics that should be included in an agent mentor program as well as resources that can be used by brokerages.	Task force to be appointed
Explore the feasibility and need to develop a "broker in a box" product.	Broker University workgroup agenda

Program, Product, Service or Activity (PPSA):

rCRMS (Certified Risk Management Specialist)

This program involves:

- rCRMS Program development, administration, delivery and marketing

Measurable objectives	**Status**
Offer a minimum of 10 live rCRMS classes and 4 live streamed rCRMS classes through association partnerships and live streaming at a competitive and affordable price.	2019 scheduled to date: 18 live classes 4 live-streamed classes
Monitor attendee feedback to update curriculum as needed.	Ongoing

Maintain a cadre of qualified instructors who meet the AAR adopted Instructor Standards and bring practical experience to the program.	On-going. New instructor for 2019 Kathy Laswick In process of identifying new attorney instructor for 2019
Maintain a dedicated instructor page to house course materials.	On-going
Offer rCRMS certification holders discounted class registration fees.	$19 discount off registration fees
Strengthen the value proposition message for CRMS program marketing.	
Recognize newly certified members on AAR facebook page and announced to local associations.	62 graduates in 2018 Monthly announcements via facebook and email to AE's

<u>Program, Product, Service or Activity (PPSA):</u>

Education Outreach

This program involves:

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

Measurable objectives	**Status**
Maintain and grow a cadre of qualified instructors who meet the AAR adopted Instructor Standards and bring practical experience and classroom engagement to the classes.	On-going Sally Liddicoat added to Ed Outreach cadre
Offer, through partnership and revenue share opportunities with local associations and brokerages, a minimum of 3 REBAC courses, and 11 days of live streamed c/e classes with competitive and affordable registration fees.	10 association partners (BHC, CAZ, Kingman, LHavasu, NAZ, Prescott, Sedona, SEArizona, WMtn, Yuma) Note: offered ABR in January in partnership with Texas Association streaming to our local associate remote sites – very successful
Provide resources for instructors to incorporate engagement activities into live streaming classes.	

Provide local associations with an education reference guide.	2019 update – anticipate update completed and distributed as soon as Marketing Toolkit is developed
Deliver an Annual Trends Summit featuring national speakers for changing trends and business practices in the industry.	Timeframe - December
Engage in opportunities or partnerships to provide new agent resources/training opportunities.	
Explore the feasibility of working with online vendors who provide online pre-licensing programs.	
Compile and package AAR's existing micro-learning content into an easy to find resource.	
Create infographic connecting educational resources that are available to the attributes of a professional.	

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	**Status**
Maintain and update learning management platform license.	License renewal due in June
Monitor and enhance live streaming platform to ensure it provides an effective learning experience.	Ongoing Currently reviewing new features o Zoom platform that include waiting rooms and breakout rooms
Incorporate gamification elements into education programs.	Researching C3 Software Regularly encourage instructors to utilize Kahoot or PollEverywhere in their presentations
Curriculum development and delivery resources are available to develop quality programs.	Legal staff completed review of CRMS curriculum December 2018 CRMS Federal Legal Issues in process of revisions

	New 3-hour course completed – Sale Contingent On…(obligations vs. contingencies)
Produce a minimum of 3 Contract Conversation videos.	Topics in 2019 include: • Buyer Contingency Form • READE Form • Additional Clause Addendum form
Create content that articulates the REALTOR value to the consumer, both on the agent and broker level and deliver it to the BS&T team.	Task Force to be appointed

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	**Status**
Provide a minimum of one Instructor Development Workshop to continually grow their skills and understanding of the needs o the modern learner.	February 11 (presentation skills in morning/curriculum writing in afternoon) – 12 attended morning session / 7 stayed for the afternoor workshop
Provide training and resources to AAR's instructors who teach AAR's live streaming classes.	On-going
Develop teaching tip/best practice and classroom management video snippits forAAR classes.	
Monitor and share emerging trends in instructor skills which can aid instructors in enhancing their skills.	On-going
Distribute information about NAR's Commitment to Excellence program and	Monitoring Information was posted on facebook in January.

encourage instructors to promote it in their classes.	Offered NAR C2EX opportunity to participate in vendor table at convention – no interest
Provide one scholarship to the Bob Pike Train the Trainer for one new AAR instructor who would benefit from the program.	Kathy Laswick will attend the April Train the Trainer Bootcamp.

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	Status
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.	Timeframe: September Mandy Neat to chair the planning workgroup

Program, Product, Service or Activity (PPSA):

Leadership Training & Development
This program involves:

- Annual Leadership Conference
- LTA program
- Leadership Workshop

Measurable objectives	Status
Offer an annual conference for incoming leadership and members who wish to become leaders.	
Offer a leadership development program (LTA) specifically for incoming local association presidents-elect.	Schedule has been distributed to AE's as well as posted on the AE Basecamp. (3/6-7, 4/24-25, 7/1718, 8/21-22
Develop and/or partner to offer educational events, classes and opportunities to enhance leadership skills.	

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
- Development of learning path resources

Measurable objectives	**Status**
Recognize members' lifelong learning commitment through a membership-based program connected to educational accomplishments.	MRES Society program
Distribute MRES Society information through targeted eblasts, rCRMS/GRI classes and social media channels.	Eblasts were sent on January 24 and February 15. Article in the January 29 issue of the Voice (47 clicks)
Increase MRES Society membership by 10%.	Membership drive underway To date: 16 new members, 13 renewing members and 10 gold applications have been approved
Create topical learning paths/infographics to assist new agent or members looking to take their career to the next level.	
Monitor and promote NAR's Commitment to Excellence program.	Monitoring program progress and marketing materials Requested and obtained list of Arizona members signed up for the program.
Solicit feedback from MRES members to evaluate membership value.	Survey to members scheduled for November
Develop talking points regarding the value of life long learning and distribute to MRES Society members to help them serve as Ambassadors/Mentors.	
In partnership with the GRI program to offer MRES Society members access to a special education program.	Tentative timeframe for webinar week – late summer

Develop campaign that emphasizes the benefits and value of lifelong learning.	

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	Status
Offer a minimum of 10 live CRPM classes and 4 live streamed classes at a competitive and affordable fee through partnership with local associations, firms and NARPM.	2019 scheduled: 19 live classes 8 live-streamed classes
Maintain a cadre of qualified instructors who meet the AAR adopted Instructor Standards and bring practical experience to the program.	On-going
Maintain an 80% student satisfaction in all classes.	Ongoing – currently objective is being met
Offer a minimum of 2 timely webinars focusing on property management issues.	
Offer a Summit that addresses property management issues and topics.	
Announce and maintain a list of members who earned the CRPM certification on facebook and to local associations.	Ongoing/monthly

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	Status
The GRI program is available and accessible to members throughout the state through partnerships and live streaming.	58 classes scheduled (4 live streamed scheduled)
In partnership with the MRES Society, provide GRI designees with access to a special education program.	Tentative timeframe for webinar week – late summer
Maintain and enhance the GRI website as needed.	Website vendor to start work to fix the “my class history” issue
Evaluate the program annually to ensure it is responsive to the changing industry.	Survey - October
Survey designees who earned the GRI designation to measure how and what they implemented into their business practice as a result of what they learned in the GRI Program.	Survey - October
Maintain, monitor and grow a cadre of qualified instructors who meet the established GRI instructor criteria, AAR Instructor standards and embrace leaner-centered teaching styles.	On-going
Provide sufficient resources to update and maintain the Online Business Planning course.	On-going
arketing messages will focus on the value/benefits - connection to building a successful career.	On-going – module descriptions and strategic direction updated in November 2018
Communicate quarterly with Brokers to emphasize the value the program brings to their agents’ business success and available scholarships.	Quarterly emails
Provide GRI Administrative Guide to course providers.	Website portal for Admins and instructors
Recognize new designees through social media and announcements and provide resources to help them promote their accomplishment.	Ongoing Monthly emails to AE’s/facebook announcements 163 graduates in 2018
Provide a financial scholarship program to members.	$15,000 in 2019 budget 42 scholarships awarded in 1st quarter 2019 2nd quarter scholarship open enrollment date is March 7th.
Monitor national trends in the GRI programs to keep AAR’s GRI program growing and evolving.	
Compile and Monitor student demographics.	

Program, Product, Service or Activity (PPSA):

REALTOR Convention
This program involves planning, delivery and marketing of annual convention

Measurable objectives	Status
Offer a statewide convention 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 energizing networking opportunities.	March 25-28, 2019 Scottsdale Plaza
Feature national speakers to provide a broad scope in national business practices, trends and techniques.	Done
Utilize a variety of marketing efforts to inform members of the convention and its value -promote date and location one year in advance.	Marketing Plan distributed at January PBD meeting Digital Air Strike hired for social marketing Vehicles used: Targeted mails, facebook/twitter Talking points distributed to line officers/RVP's, flyers developed and distributed to local association AE's
Provide sessions that assist members in enhancing their business such as lead generation, top producer panels, best practices and business planning.	Done
Provide sessions that assist members in understanding the Arizona REALTORS value proposition and benefits, such as the use of association business tools, risk management resources, legal updates and legislative/political advocacy efforts.	TransactionDesk training rolling ou at convention President and CEO presentation at Tuesday's lunch
Investigate partnership/promotion opportunities with brokerages, builders and other real estate related organizations.	Contacted large brokers in the Valley asking for assistance and providing information to them
Investigate third party marketing with RFP and retain if advisable.	Digital Air Strike engaged for facebook ads and Instagram ads
Explore and evaluate areas/locations for the convention in 2021.	
Develop talking points and distribute to RVP's	Done

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 and support activities
- Promotion and marketing efforts
- Online registration ETF expenses
- Attendance and conferences/events
- Marketing and promotion activities for PBD programs

Measurable objectives	**Status**
Appropriate groups are formed and kept updated throughout the year.	On-going
Provide the necessary equipment, supplies, subscriptions, licenses and tools to implement the business plans, host/house online program and registration functions.	Ongoing
Participate in local association and firm events, where available, to promote AAR's educational programs and resources.	Quarterly Coldwell Banker Success Days
Develop or strengthen program messageswhere needed to connect the program benefit to members' success/transaction solutions.	
Develop easy to follow paths to earn the rCRMS, CRPM and GRI using infographic format.	
Print and distribute 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.	As needed
Review and re-energize (if appropriate) the use of the Reteach.us site.	

Employ technologies and resources to create and retain a state of the art learning environment available to members.	Ongoing
Distribute a monthly calendar for AAR's education and events and monitor it's open/action rates.	Currently monthly calendar eblast – in process of reviewing effectiveness
Provide resources for staff attendance at AAR, NAR and-Education-related conferences/forums.	Ongoing – per budget
Market AAR's education and events through targeted eblasts, social media and invitation videos and monitor the open/action rates (3 touch approach).	3-touch approach for eblasts Note: RAMCO is not currently able to pull marketing lists for past students/members who started in the CRMS and CRPM programs but have not taken the upcoming class yet
Provide marketing collateral to AAR's education partners to use in marketing AARs education programs.	Flyer templates provided to local association partners prior to each class. Commercial about AAR's Live Streaming format produced and distributed to local association AE's In process – class marketing toolkits to consist of: • Forward-ready emails • Pre-written social media posts • Facebook event page link • Video invites from instructor
Monitor program marketing efforts/results and utilize in targeting.	On-going
Identify and monitor student demographics for each of AAR's education programs: GRI, rCRMS, CRPM and c/e student and utilize in target marketing efforts.	