

2019 PBD Measurable Objective Update

From: Professional and Business Development (PBD) Committee
Chair: Cindy Ready
Staff Liaison: Barb Freestone
Date: September 17, 2019

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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 – Planning
- Convention Planning

Recommendations

- None at this time

Groups Formed

- GRI Oversight Workgroup – Marci Slater
- Industry Partners Conference Planning Workgroup – Mandy Neat
- REALTOR Value Statement Task Force – Becca Linnig
- Convention Task Force – Jim Sexton
- Agent Mentor Feasibility Task Force – Eric Gibbs

Program, Product, Service or Activity (PPSA):

Broker University

Measurable objectives	Status
Design and deliver a broker summit that addresses the needs of the diverse brokerage community	2018 Broker University Workgroup and PBD recommended and approved discontinuing this in 2019
Develop, partner and/or provide programs that focus on operational competencies.	In talks with Candy Cooke to present a live streaming CRB class this year
Programs receives a minimum of 80% attendee satisfaction.	N/A
Design and deliver a communication	Quarterly eblasts sent to Brokers

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.	September 18 and September 23- Convention did not offer BMC this year
Produce and distribute a minimum of two webinars focusing on issues important to brokers.	One webinar recorded to date: June 11 webinar on Recruiting & Hiring Top Producing Agents (Paramount Consulting Group) No other webinar topic has been identified or requested
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 – 1 st Monday of each month to Broker/Legal Hotline distribution list – beginning in June – video will be included in the first Voice issue of each month
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 appointed – report pending PBD Committee review
Explore the feasibility and need to develop a “broker in a box” agent training product.	Task force appointed (Kathy Laswick, chair) – on hold until Agent Mentor Task Force meets

Program, Product, Service or Activity (PPSA):

rCRMS (Certified Risk Management Specialist)

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.	Message reviewed – no revisions recommended
Recognize newly certified members on AAR facebook page and announced to local associations.	62 graduates in 2018 24 graduates to date in 2019 Monthly announcements via facebook and email to AE's

Program, Product, Service or Activity (PPSA):

Education Outreach

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 Kathy Laswick and 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, Lhavas, NAZ, Prescott, Sedona, SEArizona, WMtn, Yuma) Note: offered ABR in January in partnership with Texas Association streaming to our local associations remote sites – very successful Offered ePRO in August through live streaming – very successful
Provide resources for instructors to incorporate engagement activities into live streaming classes.	
Provide local associations with an education reference guide.	2019 update –Class Marketing Toolkit rolled out this month
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.	Webinars offered to date: February Tips for Dealing With HOA's March FEMA Flood Program Update March: Power of Engaging Drip Campaigns April AirBnB & HOA's May – LLC for Investment Property
Explore the feasibility of working with online vendors who provide online pre-licensing programs.	No vendor requests received to date
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

Measurable objectives	Status
Maintain and update learning management platform license.	Renewed license with Learning Library
Monitor and enhance live streaming platform to ensure it provides an effective learning experience.	Ongoing Currently reviewing new features of 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) New course on Article 26 (Commissioners Rules) ready to roll out shortly.

Produce a minimum of 3 Contract Conversation videos.	2019 recordings: September 27 : <ul style="list-style-type: none"> • Buyer Contingency Form (Scott and Stephen Gomez) • READE Form (Nikki and Gerry Russell) September 19: <ul style="list-style-type: none"> • Additional Clause Addendum form (Scott and Mike Porter)
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 met in May/June – recommendations approved by PBD Committee and will be forwarded to BS&T for implementation

Program, Product, Service or Activity (PPSA):

Instructor Development

Measurable objectives	Status
Provide a minimum of one Instructor Development Workshop to continually grow their skills and understanding of the needs of the modern learner.	February 11 (presentation skills in morning/curriculum writing in afternoon) – 12 attended morning session / 7 stayed for the afternoon 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 snippets for AAR classes.	Working on Facebook group for Arizona REALTOR instructor Cadre
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 encourage instructors to promote it in their classes.	Done – June 19 email and powerpoint slide template
Provide one scholarship to the Bob Pike Train the Trainer for one new AAR instructor who would benefit from the program.	Kathy Laswick attended the April Train the Trainer Bootcamp.

Program, Product, Service or Activity (PPSA):

Industry 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.	September 17 Black Canyon Conference Center Planning chair: Mandy Neat

Program, Product, Service or Activity (PPSA):

Leadership Training & Development

Measurable objectives	Status
Offer an annual conference for incoming leadership and members who wish to become leaders.	Leadership Conference October 16-18, 2019 Embassy Suites Paradise Valley
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, 7/17-18, 8/21-22)
Develop and/or partner to offer educational events, classes and opportunities to enhance leadership skills.	November 20 – Leadership Journey to be co-hosted with SAAR

Program, Product, Service or Activity (PPSA):

MRES Society

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%.	2019 Renewing members: 31

	<p>2019 New members: 23</p> <p>(2018 members) Renewing members: 25 New members: 28</p>
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.	<p>Monitoring program progress and marketing materials Requested and obtained list of Arizona members signed up for the program.</p> <p>Information posted on facebook in January. Offered NAR C2EX opportunity to participate in vendor table at convention – no interest</p> <p>Participating in NAR C3 C2EX Challenge – marketing campaign to run June-September 1. Primary Committee challenge issued June 10th</p>
Solicit feedback from MRES members to evaluate membership value.	Survey to members scheduled for November
Develop talking points regarding the value of lifelong 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.	<p>Webinar week: September 9 Speakers included: Laura Monroe Shay Hata Cheryl Knowlton Jay Thompson Robbie English</p>
Develop campaign that emphasizes the benefits and value of lifelong learning.	

Program, Product, Service or Activity (PPSA):

Property Management Certification

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.	December 11 th 9-4 at the SAAR conference center
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

Measurable objectives	Status
The GRI program is available and accessible to members throughout the state through partnerships and live streaming.	60 classes scheduled (4 live streamed scheduled)
In partnership with the MRES Society, provide GRI designees with access to a special education program.	September 9 Webinar week. Presenters included: Shay Hata Laura Monroe Cheryl Knowlton Jay Thompson Robbie English
Maintain and enhance the GRI website as needed.	Website issues with “my course history” fixed. Vendor completed the “no show” fix in the “my course history” section of the GRI website
Evaluate the program annually to ensure it is responsive to the changing industry.	Survey – October

	98% of students indicated they learned something they can put into practice 91% of students indicated the content level was "just right"
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 learner-centered teaching styles.	On-going
Provide sufficient resources to update and maintain the Online Business Planning course.	On-going
Marketing 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 Next email to be sent in September
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 56 graduates to date (163 graduates in 2018)
Provide a financial scholarship program to members.	\$15,000 in 2019 budget 42 scholarships awarded in 1 st quarter 2019 51 scholarships awarded in 2 nd quarter 2019 37 scholarships awarded in 3 rd quarter 2019 4 th quarter open enrollment date is September 12 th
Monitor national trends in the GRI programs to keep AAR's GRI program growing and evolving.	On-going
Compile and Monitor student demographics.	On-going

Program, Product, Service or Activity (PPSA):

REALTOR Convention

Measurable objectives	Status
Offer a statewide <u>convention</u> 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 387 total registrations (includes no shows, at-doors, paid, comps, staff, vendor reps)
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 rolled out 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.	Task Force recommendations approved at July meeting
Develop talking points and distribute to RVP's	Done

Program, Product, Service or Activity (PPSA):

Support & Resources

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 messages where needed to connect the program benefit to members' success/transaction solutions.	On-going
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.	On going Facebook ad – June
Employ technologies and resources to create and retain a state of the art learning environment available to members.	Ongoing Live Streaming platform Webinar platform
Distribute a monthly calendar for AAR's education and events and monitor it's open/action rates.	Monthly calendar eblast determined not to be effective. Utilizing the weekly Voice for upcoming class information. Full schedule housed on www.aaronline.com
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

<p>Provide marketing collateral to AAR's education partners to use in marketing AARs education programs.</p>	<p>Flyer templates provided to local association partners prior to each class. Class marketing toolkit for local association partners rolled out in late April which includes:</p> <ul style="list-style-type: none"> • Forward-ready emails • Pre-written social media posts • Facebook event page link • Video invites from instructor <p>Commercial about AAR's Live Streaming format produced and distributed to local association AE's</p>
<p>Monitor program marketing efforts/results and utilize in targeting.</p>	<p>On-going</p>
<p>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.</p>	<p>On-going</p>