



The UK's No.1 online training provider for
estate and letting agents.



Guide to Building a Training Plan for Estate and Letting Agencies

Why Train?

94%

of learners said that they see the career benefits of making the time to learn

(According to LinkedIn Learning Data May 2020)

83%

of online learning happens during the work week.

(According to LinkedIn)

TO RETAIN STAFF

94% of employees say they would stay at a company longer, if it invested in their learning and development. Staff leave, or fail to hit targets if they aren't given the tools to do their job properly.

IT'S NOT JUST ABOUT COMPLIANCE...

Be confident that your staff are property experts.

Knowledge gives people confidence – whether that's in offering advice or in asking for higher fees.

How can you set a target without giving staff the tools to hit the target?

IT SOLVES SPECIFIC PROBLEMS

- Improves the quality of your company database for you
- increases fees
- encourages more property management clients
- generates more mortgage leads
- improves customer service
- improves sales confidence
- proof of CPD
- validates compliance

SUPPORT INDIVIDUAL STAFF MEMBERS

Solve confidence and specific performance issues.

IT WILL HELP YOU GROW YOUR BUSINESS..

- Confident staff charge higher fees
- Confident staff are able to cross sell
- Expert staff offer excellent customer service.



How to Build a Training Plan

How to build training into a busy agency day

The key to training is to have a clear idea of what you want to achieve and use the training to achieve it.

- Better quality market appraisals?
- Higher fees?
- Better customer service?
- Less staff turnover?
- Make compliance easy?

Training is best, when it is flexible and results monitored.

PLAN

- ▶ For the business – pick a handful of topics to cover
- ▶ Plan training for your individual staff
- ▶ Establish what each person's motivation is?
- ▶ Establish what gaps in knowledge staff have

You can do this via an appraisal

You can do this via a skills analysis

HOW TO USE THE SKILLS ANALYSIS TOOL

Decide who is going to complete the matrix- the manager, the employee or both.

- Read the ranking system and come back to it when you are uncertain.
- Once completed, check does it make sense. Do the areas where the scores are high reflect where you excel and do the lowest scores match where you struggle?
- Review the skills analysis in 6 months' time and see what has happened to the scores.

Topics to consider for training.

MAKE TRAINING EASY

- ▶ **Include topics in the morning meeting**
 - 10 minutes per day and then review
- ▶ **Set specific tasks for staff**
 - e.g. hot call new properties
- ▶ **Agree mentors – find staff who are good at certain tasks: could they record some video content OR host the morning meeting.**
 - Who is confident winning mortgage appointments?
 - Who is confident using the CRM reports?
 - Who understands sales progression?
 - Who understands property law.....etc?
- ▶ **Sign up to trade press emails, websites etc.**
- ▶ **USE your knowledge....Think about different scenarios that are positive, to showcase your business....**
 - The property that sold via auction and achieved a really high price
 - The vendor who used your agency, after previous fall throughs
 - The Landlord who converted to full management
 - The FTB who saved money on their mortgage

Monitor training

Monitoring is how you get the most out of training i.e. if you are aiming to improve the quality of detail on your database....

- ▶ Look at the quality of your current database....

What could be improved?
Notes, email addresses,
reason for move
etc

- ▶ THEN set a measurement....

You may decide to ask for more detailed notes in a certain box in your CRM system



- ▶ THEN train them in terms of what you want to see

- E.g
- Reason for move
 - Ideal Property
 - Timescale
 - Services offered....

- ▶ THEN monitor it – check the team have completed the notes, having gained more knowledge from the training.

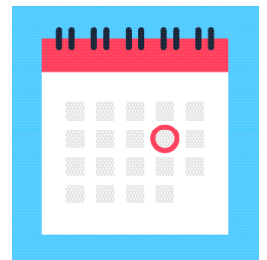


NO TIME?

Take away the HR headache of training and CPD...

Use Able Agent:

- pick the relevant courses
- set a deadline
- ask staff to submit certificates when completed by a certain date
- monitor quiz results



Make it fun!

Maybe offer a prize for first to complete the course.

Ask us for more ideas.....

Tools for your Team

- Knowledge & Skills Analysis
- Staff Appraisal
- Training Timetable

Knowledge & Skills Analysis

A skills and knowledge matrix helps managers to understand, how to make the most of the skills and knowledge in their teams.

Use this skills and knowledge matrix tool to:

- identify strengths and where there may be gaps
- identify areas to guide staff development
- define which training may be of use

HOW TO USE THE MATRIX

- 1 Decide who is going to complete the matrix – the manager, the employee or both. There are pros and cons to whichever one you choose.
- 2 Read the ranking system and come back to it when you are uncertain.
- 3 Once completed, check does it make sense? Do the areas where the scores are high reflect where you excel and do the lowest scores match where you struggle?
- 4 Are the right people with the right skills and knowledge doing the right tasks?
- 5 Sign those with the most need to The Able Agent® online training and do the skills matrix again in 6 months and see what has happened to the scores.

RANKING SYSTEM

Score	Skill Level	Description
5 ★★★★★	Expert	● Fully capable, experienced and knowledgeable ● Sought for help by others ● Needs no assistance ● Seen as a subject expert
4 ★★★★	Capable	● Capable and experienced ● Demonstrates knowledge ● Able to work independently with little help ● Will be expert with more knowledge and time
3 ★★★	Adequate	● Able to perform routine tasks ● Has some direct experience ● Unsure of knowledge ● Needs help from time to time
2 ★★	Basic	● Limited in knowledge ● Cannot carry out critical tasks ● Needs significant help from others
1 ★	Low/None	● Little or no experience or knowledge ● Requires full supervision

Name _____

Date completed by _____

Knowledge & Skills Analysis

GENERAL PROPERTY KNOWLEDGE

	★★★★★	★★★★	★★★	★★	★
Membership bodies- redress schemes					
The importance of notes					
Hot calling					
Applicant management					
Time management					
Empathy and trust					
Mastering phone skills					
Dealing with angry clients					
Handling abusive calls					
Writing a professional email					
Questioning skills					
Selling using features and benefits.					
Overcoming objections					
Closing techniques					
Managing a well categorised applicant list					
Following up a new applicant					
Proactively generating viewings					
Viewing feedback					
Cross selling mortgages					
Cross selling conveyancing					
Dealing with investors					
Stamp duty					
Booking a perfect market appraisal					
Handling fee enquiries					
Consumer Protection Regulations 2008					
Cooling off period					
Data Protection Act / GDPR					
Equality Act 2010					
Health and safety					
Anti-money laundering					
Town & country planning - boards, permitted development					
Contract law					

KEY: Expert ★★★★★ Capable with good knowledge ★★★★ Adequate could do with more knowledge ★★★ Basic limited knowledge ★★ Low/unknown no knowledge ★

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www.theableagent.co.uk

Knowledge & Skills Analysis

ESTATE AGENCY

	★★★★★	★★★★	★★★	★★	★
Private treaty					
Auction					
Tender					
Estate Agents Act 1979					
Referral fees guidance					
Negotiating a sale					
Encouraging and taking offers					
Informal tenders (best and final)					
Price reductions					
Vendor contact					
Gazumping and gazundering					
Understanding surveys					
Dealing with a tricky survey					
Retentions and down valuation					
Property searches					
Title and land registry					
Land law (Tenure/easements and covenants)					
Building regulations					
Party Wall Act					
Enquiries					
Managing a chain					
Testimonials and new business					

LETTINGS

	★★★★★	★★★★	★★★	★★	★
Housing Act – landlord and tenant obligations					
Assured shorthold tenancy					
Deposit legislation					
Property safety					
Homes (Fitness for Human Habitation Act 2018)					
Non-Housing Act tenancies					
Joint and several liability					
EPC and minimum standards					
HHSRS					

KEY: Expert ★★★★★ Capable with good knowledge ★★★★ Adequate could do with more knowledge ★★★ Basic limited knowledge ★★ Little/no knowledge ★

Staff Appraisal

Name	Position	Ref
Year or period covered	Length of service	Time in present position
Appraisal date & time	Appraiser	

PART A Appraiser to complete before the interview and return to the appraiser by (date)

A1 State your understanding of your main duties and responsibilities.

A2 Discussion points:

1. Has the past 3- 6 months been good/bad/satisfactory or otherwise for you, and why?

2. What do you consider to be your most important achievements of the past year?

3. What do you like and dislike about working for this organisation?

4. What elements of your job do you find most difficult?

5. What elements of your job interest you the most, and least?

6. What do you consider to be your most important aims and tasks in the next year?

7. What action could be taken to improve your performance in your current position by you?

and your boss

8. What kind of work or job would you like to be doing in one/two/five years time?

9. What sort of training/experiences would benefit you in the next year? Not just job-skills – also your natural strengths and personal passions you'd like to develop – you and your work can benefit from these.

10. Score your own capability or knowledge in the following areas in terms of your current role requirements (1-3 = poor, 4-6 = satisfactory, 7-9 = good, 10 = excellent). If appropriate bring evidence with you to the appraisal to support your assessment. The second section can be used if working towards new role requirements.

- | | | | | | |
|---|--------------------------|---|--------------------------|--|--------------------------|
| 1. sales skills | ☐ | 2. product/technical knowledge | ☐ | 3. time management | ☐ |
| 4. admin tasks | ☐ | 5. team work | ☐ | 6. communication skills | ☐ |
| 7. delegation skills | ☐ | 8. IT/ skills | ☐ | 9. meeting deadlines | ☐ |
| 10. creativity | ☐ | 11. problem-solving and decision-making | ☐ | 12. team-working and developing others | ☐ |
| 13. energy, determination and work-rate | ☐ | 14. steadiness under pressure | ☐ | 15. personal appearance and image | ☐ |

11. What activities and tasks would you like to focus on during the next year. Also think of development and experiences outside of job skills-related to personal aims, fulfilment, passions.

12. Any other issues or workplace concerns?

Is there anyone else you would like to speak to, other than your Appraisal Team? (to be covered separately outside of this appraisal – continue on a separate sheet if necessary):

Any internal concerns

– if had any concerns who would you go to?

– day to day in working environment?

Do you feel your health and safety and welfare are well looked after?

PART B To be completed during the appraisal by the appraiser.

1. Discuss and agree the appraisee's career direction options and wishes, and readiness for progression.

2. Discuss and agree the skills, capabilities and experience required for competence in current role, and if appropriate, for readiness to progress to the next role or roles.

3. Discuss and agree the specific objectives that will enable the appraisee to reach competence and to meet required performance in current job

4. Discuss and agree the training and development support to be given to help the appraisee meet the agreed objectives above.

Signed and dated by appraisee:	and by appraiser:
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Guidance notes. Personal development and support must be offered to all employees, irrespective of age, gender, race, disability, etc., and not just to those seeking promotion. Development is not restricted to job skills – it includes 'whole person'. Use your imagination. Job skills training isn't restricted to courses. Think about coaching, mentoring (by and of the appraisee), secondment to another role, holiday job cover, shadowing, distance-learning, e-learning, books, videos, attending meetings and workshops, workbooks, manuals and guides, researching, giving presentations; anything relevant, helpful and agreed to help the person develop. Avoid committing to training expenditure before suitable approval or availability has been confirmed. Understand development options and procedures before conducting the appraisal. Develop the whole person.

Training Timetable

MODULES (COURSE)		Planned Course Order	Date Started	Course Completed	% Lessons Completed	Quizzes Completed	Certificates	Achieved/saved	Qualification Registered	Exam Date	Pass Resit
CePAP	NEW STARTER										
	New Starter induction	1									Start here
	ESTATE AGENCY ESSENTIALS										
	Negotiating										
	Estate agency legislation										
	Handling Buyers Enquiries										
	Handling Vendors Enquiries										
	LETTINGS ESSENTIALS										
	Negotiating a let										
	Handling Tenant Enquiries										
	Handling Landlord Enquiries										
	Lettings Legislation										
	GENERAL LEGAL COMPLIANCE										
	Compliance										
	Property Law										
	AML - Anti Money Laundering										
	SALES SKILLS + CUSTOMER SERVICE										
	Customer Service										
	Sales Skills										
	Negotiator Skills										
	SPECIALISMS										
	Auction										
	Sales Progression										
	Property Management										
	Wellbeing										

About Able Agent

The Able Agent is the easy, convenient and affordable way to train your sales and lettings agents.

- UK No. 1
- Time saving
- Cost effective
- Easy online training
- Video based
- Accredited



OVERVIEW

9 MODULES

COVERING

New Starter
Estate Agency Essentials
Letting Essentials
Legal Compliance
Sales Progression & Property Structure
Specialisms such as Auction
Guest Expert Industry Courses
Property Management
Sales skills & Customer Service

20 COURSES

AND GROWING!

Our online course catalogue is continually developing, providing new knowledge and value on a monthly basis to keep your team up to date and develop new skills.

100+

ANIMATED VIDEO LESSONS

Our in-house team are experts in the development of videos & animation, producing flexible micro lessons to work around your team's schedule.

200+

EBOOKS INCLUDING ONLINE TESTS

To support our video learning, there are eBooks and online tests to cater for different learning styles and to embed knowledge further. Learners can monitor their progress and download certificates from their own profile area.

Contact us to discuss your training needs.

GENERAL ENQUIRIES

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TECHNICAL SUPPORT

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SALES INFORMATION

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