

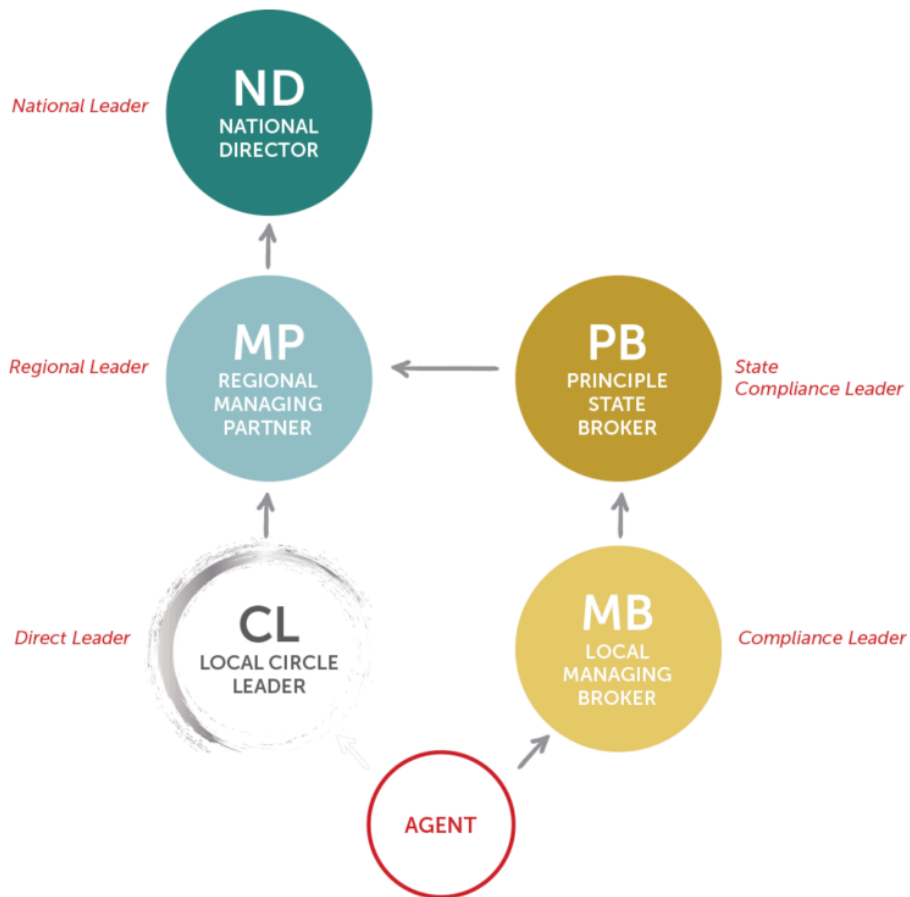


## Welcome Circle Leader

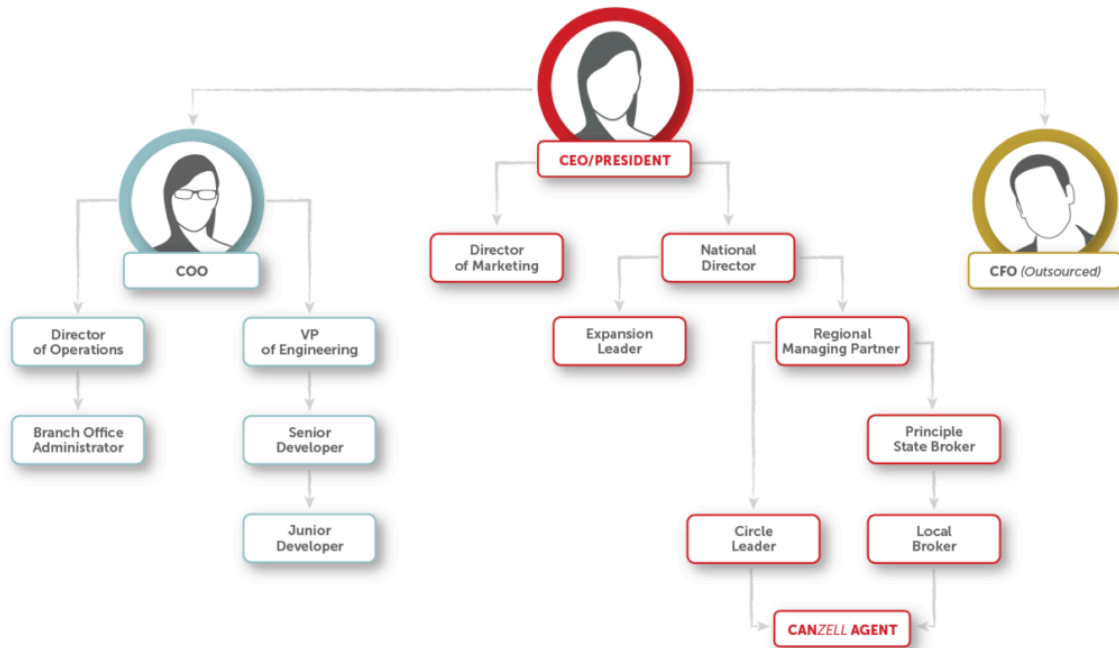
Welcome to the Circle Leader position with CanZell Realty. We are so excited for the impact you will have on the agents you lead. In this guide, you will find all of the resources you will need to be successful in this role at CanZell Realty.

### Organizational Chart:

Circle Leadership Organizational Chart



## Corporate Organizational Chart



### Circle Leader Expectations:

- Meet with Mentors once a month (30 min on zoom)  
If you don't have mentors, hire mentors with a mentor interest meeting.
- Attend Weekly Management Call (30 min): Must attend min 3 out of 4
  - Plan and hold an Agent Mastermind/Team Building once a month
- Attend Weekly National Agent Meeting (Tuesday 12pm EST - 12:30pm EST): Must Attend min 3 out of 4
- Hold weekly Agent Success Meeting (Tuesdays 12:30pm EST - 1pm EST): Must Attend
- Contact each agent individually monthly via text, email or phone

### Total Commitment:

- Approx: 9 hours  
If you don't have mentors, hire mentors with a mentor interest meeting.
- Fill out and turn in monthly form (<https://canzellcloud.com/leadershippay>)

### **Circle Leader Recommendations:**

- Have an attitude of attraction your conversations with agents from other companies (2 per wk/min)
- Meet once a quarter on zoom or in person with agents in your circle (30 min a quarter)
- Hold 1 monthly training for agents in your circle on a different system or process they have questions on.
- Answer questions from agents on company systems and processes. Some examples could be:
  - *"How do I start a team?"*
  - *"How do I hire a buyer's agent?"*
  - *"How do I hire an admin assistant?"*
  - *"How do I expand in the luxury market?"*
  - *"I don't like my mentor, can I have a new one?"*
  - *"How do I enter a transaction?"*
- Answer all agent emails and texts within 2 business hours
- All compliance and Broker questions should be answered by the Managing Broker

### **Income:**

- 5% of company dollar of the closings of the agents in your circle
  - \$500 bonus on each producing agent\* + commission
- \*Producing agent is an agent who closed 4 or more transactions in the last 12 months

## Who Wears What Hat?

### *Branch Office Administrator (BOA)*

- Handle all administrative tasks
- Complete transaction management for all files
  - Full transaction coordination includes:
    - QC'ing all files for all documents, signatures, and required fields
    - Send out welcome letter to clients, cooperating agents, attorneys, lenders and transactions coordinators
    - Remind agents of important dates and make sure deadlines are met
    - Check on files with lenders and attorneys weekly to make sure closings are on track
    - Get final ALTA's and CD's to make sure commissions and transactions fees are correct
    - Final QC to make sure all documents are in for compliance
    - Process commission and agent payment
  - QC coordination (Agent or Agent's TC does the transaction coordination - \$200 transaction credit is refunded to the agent at closing)
    - QC'ing all files for all documents, signatures, and required fields
    - Final QC to make sure all documents are in for compliance
    - Process commission and agent payment
  - On-boarding Agents
    - Going through the onboarding checklist to make sure each agent is fully on-boarded
  - Off-boarding Agents
    - Going through the off-boarding checklist to make sure each agent is fully off-boarded
  - Pay all agent commissions
  - Keep all agent E&O accounting up to date
  - Manage questions on transactions and agent help via Slack and Workplace by Facebook
  - Items you could contact a TC about:
    - Questions on a transaction
    - Questions on on-boarding
    - Questions on off-boarding
    - Questions on commissions
    - Questions on E&O payments
    - Simple questions on systems and processes

### *Web Developers*

- Develop systems to make the agent's life easier and more efficient
- Help with any technical issues
- Integrate systems so agents have everything in one place
- How to contact web? [help@canzell.com](mailto:help@canzell.com)
- Items you could contact the help desk with:

- Technical issue with a system
- Issue logging in
- Issue with data being displayed incorrectly

### *Creative (Marketing/Video)*

- Create new content for sales and recruitment ads
- Record/Edit Training videos
- Record/Edit corporate videos

### *Operations:*

- Help with systems that run our business
- Create new systems to help agents be more efficient and sell more
- Create and execute the vision and growth of the company
- Director of Operations:
  - Handles Q&A everyday at 1pm helping agents with any system issues they had (<https://zoom.us/j/7577171003>)
  - Handles lead rules and making sure that agents are meeting compliance
  - Oversees BOA's
  - Oversees Inside Sales
- Chief Operating Officer:
  - Oversees all systems in the company
  - Oversees state openings
  - Researches and implements new programs and systems
  - Oversees DOO and Web Department
- Items you would go to DOO for:
  - Issues with a system
  - Issues on-boarding
  - Issues with a BOA
  - Issues with ISA

### *President/CEO*

- Plans and executes vision and growth of the company
- Drives recruitment of teams/brokerages to grow the company
- Oversees acquisition of small independent brokerages
- Items you would go to the President for:
  - If you had a small brokerage or large team that wanted to join CanZell

### *Managing Broker*

- Local broker to agents
- Answer contract and compliance questions
- Handle complaint calls
- Handle broker to broker issues
- Hold contract class once a week with agents in their circle
- Items you would go to the Managing Broker for:
  - Contract questions your mentor can't answer
  - Broker to Broker issues

### *Managing Partner/Regional MP's*

- Oversee Circle Leaders
- Train Circle Leaders
- Answer questions Circle Leaders have
- Serve as a liaison between Circle Leaders and Upper Management
- Hire and grow new Circle Leaders
- Items you would go to them for:
  - Questions an agent has asked that you don't know the answer for
  - Questions on Circle Leader training
  - How to attract new agents to their circle

### **Acronyms:**

BOA: Branch Office Administrator

MP: Managing Partner

CL: Circle Leader

MB: Managing Broker

DOO: Director of Operations

COO: Chief Operating Officer

### **Meetings to Attend:**

National Call: Tuesday at 12:00 pm EST - 12:30 pm EST: Guest speaker for agents

Agent Success Meetings: Tuesday 12:30 pm- 1:00 pm EST: Agent set commitments for the week

Management Meeting: Thursday 3:00 pm EST: Listen to podcast for the week and management discussion

Monthly Mentor Meeting

### **Culture of Leadership**

At CanZell, we believe that as leaders, we need to continue to pour into ourselves to grow, in order to help our agents grow. Each week, you will attend our management meeting where we discuss and mastermind together. Management will send out a podcast each week for you to listen to. We will discuss our implementations in the management meeting each week. We encourage to make your car, your university. When driving around from appointment to appointment, listen to this and other leadership podcasts to help take you to the next level.

## Checklists and Timelines

When onboarding, use the following checklist to make sure you have completed all steps to onboard as a Circle Leader.

### Checklist

- Did you complete all of your onboarding?
  - MLS Paperwork Processed
  - State Paperwork and Payment Sent
  - Received Headshot
  - SkySlope/BrokerMint user - make sure they are set up correctly.
  - Completed New to CanZell Agent Training
  - kvCore Site Set Up
  - All Paperwork Signed
  - Set up Email
  - Add to Slack and Workplace by Facebook
  - 15 minute Orientation
- Did you sign your Circle Leadership Agreement?
- Is your email set up/forwarded and email signatures updated?

Note: If you forward your email, please make sure to check your forwarding rules regularly. We will not be able to monitor or secure your email once you are forwarding to an outside email.
- Have you completed all of the training offered on <https://www.canzellcloud.com> ?  
(listed in order of importance)
  - Welcome to CanZell: Orientation
  - CanZell Deep Dive and BrokerBuck Training
  - Setting up your kvCore and CRM Training
  - SkySlope and BrokerMint: Listings and Ratified Contracts
  - kvCore: CanZell Referrals
  - kvCore: Lead Generation
  - Slack and Workplace by Facebook Training
  - Anthony Lamacchia Training
  - YouTube for Business
  - How to Maximize Tik Tok and Instagram
- Have you scheduled to meet with and shadow another Circle Leader?
  - Time: \_\_\_\_\_
- Schedule the following meetings for your Circle:
  - Monthly Meeting with Mentors: Day/Time: \_\_\_\_\_
  - Monthly Training for Agents in your Circle: Day/Time: \_\_\_\_\_
  - Agent Check-ins: Send your Calendly Link - should meet one on one once a quarter
- Add the following meetings to your calendar:
  - Tuesdays at 12:00 pm EST: National Call with a speaker
  - Tuesdays at 12:30 pm EST: Agent Success meeting with agents in your circle

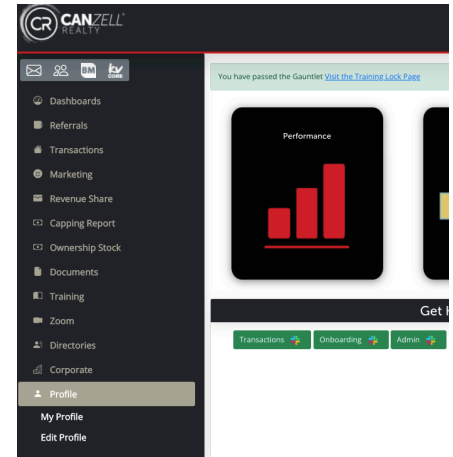
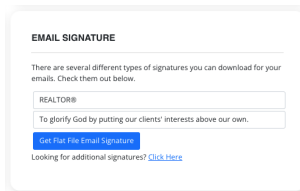
- Thursday at 3:00 pm EST: Weekly Management Meeting
- Did you send out a welcome email to your agents in your Circle (if any are existing)?

## Timeline

### Day 1:

- Sign into your email and get signatures set up
  - Email Login: You can find your login information in the Welcome Email you received when you were onboarded.
  - Email Signature: You can find several options for your email signature in <https://cancellportal.com/> under Profile/My Profile.

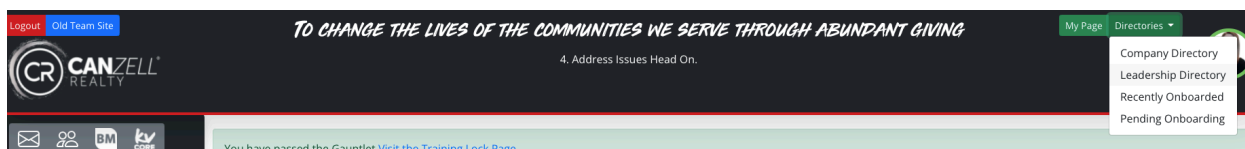
Once in your profile, you can select from different options under Email Signature.



- Log into all systems:
  - [cancellportal.com](https://cancellportal.com)
  - SkySlope/Brokersmint
  - kvCore - fill out the form to get your site set up. You can find this link in your Welcome Email.
  - Begin training on [CanZellcloud.com](https://CanZellcloud.com)
    - Welcome TO CanZell: Orientation
    - CanZell Deep Dive and BrokerBuck Training

### Day 2:

- Continue Training:
  - Setting up your kvCore and CRM Training
  - SkySlope and Brokersmint: Listings and Ratified Contracts
  - kvCore CanZell Referrals
  - kvCore Lead Generation
- Set up time to meet with and shadow a fellow Circle Leader
  - You can find fellow Circle Leaders in the Leadership Directory





- Welcome to Zoom Meeting with Onboarding Team to go over CL basics
  - Email [onboarding@canzell.com](mailto:onboarding@canzell.com) to schedule this call.
- Send welcome email out to agents introducing yourself

Day 3:

- Continue Training
  - Slack and Workplace by Facebook
  - Anthony Lamacchia Training
  - YouTube for Business
  - How to Maximize Tik Tok and Instagram
- Complete CL Training:
  - Who wears what hat?
  - How do all payouts happen? Commissions, Stock, Revenue Share, etc?
  - How to Attract Agents

Day 4:

- If you are a brand new state/territory, get the New State/Territory package and begin release of emails and social media posts
- Continue to familiarize yourself with the CanZell Dashboard in [canzellportal.com](http://canzellportal.com)

Day 5:

- Make sure all trainings are scheduled with your circle and calendar invites sent out

## **Example Texts and Emails To Send Out To The Agents In Your Circle**

Intro Email:

Hi (agent name)!

My name is (your name) and I am so excited to be your Circle Leader!

I just wanted to take a minute to introduce myself and meet you!

Let's schedule a quick 15 minute intro call...here is my calendly link to schedule: (insert calendly link).

I am so excited to share some of the things I have done to grow my business to help double yours this year.

Signature

Intro text:

Hi! This is (your name), your Circle Leader! Check out the email I just sent you!  
Looking forward to hearing from you!

Check In Email:

Hey (agent name)!

I just wanted to check in and see how business was going. I see you (insert something personal here like: ratified a deal last week and wanted to give you a high five!).

Do you have 15 minutes today or tomorrow to catch up?

Here is my calendly link: (insert link)

Talk soon!

Signature

Check in Text:

Hey! It's (insert name)! Just checking in to see if you have 15 minutes to catch up!  
Looking forward to hearing from you!

## **How To Set Up Your Calendly Link**

To set up your calendly link, follow these steps:

1. Go to <https://calendly.com/>
2. Click on "Get Started" in the upper right hand corner.
3. Enter your email address and click "Sign Up"
4. Follow the prompts to sign up/login with your email address.
5. Once you get to the welcome page, you can adjust your calendly url (as long as what you request is available).
6. Follow the steps to complete set up. This will link your email calendar to your account so it can check for conflict and availability.
7. You will also be able to set up the hours you would like to be available for clients/agents to schedule with you.
8. It automatically sets up 15, 30 and 60 minute meeting options for you. You can edit or delete any of these by clicking the gear in the upper right hand section of the meeting box you want to edit or delete.

## **Helpful Emails, Links and Websites**

BOA: [boaall@canzell.com](mailto:boaall@canzell.com)

Technical Help: [help@canzell.com](mailto:help@canzell.com)

Transactions: [transactions@canzell.com](mailto:transactions@canzell.com)

Billing/Commissions/Accounting Help: [accounting@canzell.com](mailto:accounting@canzell.com)

Revenue Share: [revshare@canzell.com](mailto:revshare@canzell.com)

OptionTrax: [support@optiontrax.com](mailto:support@optiontrax.com)

Branding/Logos/Colors: [branding.canzell.com](http://branding.canzell.com)

Training/FAQ/Links to logins: [canzellcloud.com](http://canzellcloud.com)

Internal CanZell Portal: [canzellportal.com](http://canzellportal.com)

Main Public Facing Site: [canzell.com](http://canzell.com)

Property Search Site: [canzellhomes.com](http://canzellhomes.com)

Non-Profit, CR Cares: [crgcares.org](http://crgcares.org)

Main Recruitment Site: [joincanzell.com](http://joincanzell.com)

Recruiter Central - Where you can find scripts, videos, etc: [joincanzell.com/recruiters](http://joincanzell.com/recruiters)

Luxury Site: [canzelloxury.com](http://canzelloxury.com)