OFFICE SYSTEMS ACADEMY



Major Departments



Acquisitions/Lead Generation:			
Renovations:			



Sales:		
Transactional:		

Transaction Team



Responsibilities:
Skill Set and Qualifications:

Acquisitions Team



Responsibilities:	
Skill Sets and Qualifications:	

Renovations Team



Responsibilities:		
Skill Sets and Qualifications:		

Sales Team



Responsibilities:		
Skill Sets and Qualifications:		



Employee Compensation

Notes About the Concept:				

Meeting Rhythm



Daily Huddle:	
Weekly Meeting:	
Monthly Mastermind:	

Office Tour



Office Set Up:		
Technology:		

Owners Panel



Key Take Aways:				

MLS Offer Systems



Notes About the Concept:

Step 1: Filtering
Step 2: Discovery Call

MLS Offer Systems



Notes About the Concept:

Step 3: Analyze
Step 4: Offer Call
Step 5: Follow up

Successful Offer Systems



otes About the Concept:					

Financing



Notes About the Concept:					

KPIs and Metrics



What to Track:					

Job Title: Acquisitions Analyst

Compensation: (Salary base + Bonuses)

Location: (Your Address Here)

Hours:

Experience: A minimum of 1 year of recent phone sales experience, preferably in Real

Estate Acquisitions preferred

(Your Company Name) is currently looking for a charismatic, diligent, go getter **Acquisitions Analyst** to analyze Real Estate transactions and determine if it is a profitable investment for the company to acquire. You will work with a team of highly motivated individuals and will play an integral part in the company, that continues to set (Your Co. Name) apart from other residential development companies.

Responsibilities:

- Get offers accepted by creating "win win" situations with agents and homeowners over the phone and email
- Perform a high level analysis and estimate on real estate transactions to determine profit
- Work directly with real estate agents, create deals from the MLS and determine if homes should be purchased
- Network, self-generate marketing and build local contacts to generate pocket listings

Qualifications:

- Strong communication skills and the ability to build rapport over the phone
- Attention to detail, overcoming objections, stress management
- Charismatic with an outgoing personality
- The ability to listen, answer questions and create solutions to difficult situations
- Strong follow up skills with potential property owners
- Self-motivation and a strong personal drive.
- Desire to learn, follow and improve a proven real estate system
- Work well within a team
- Real Estate License is a plus

About (Your Company Name)

Here at (Your Company Name), our mission is to rejuvenate neighborhoods and increase the standard of living by improving the overall quality of housing for the residents.

(Your Company Name) is the (Your City Name) premier real estate solutions company, and since our inception we have been helping homeowners along with improving communities in each and every city we work in. Through our extensive knowledge of the business, network of resources, and years of expertise, we are able to assist homeowners with a wide variety of real estate problems. We pride ourselves on our reputation for working one-on-one with each customer to handle their individual situations and being dedicated to give back to our community.

Position: Junior Project Manager

Do you love to take something old and make it new again? Is your passion to work in an awesome work environment? Are you a self-motivated team player?

Would you like to learn from the Owners of one of the fastest growing real estate redevelopment companies?

If you are a tech savvy "people person" with a natural ability to take action, and you are interested in surrounding yourself with growth minded professionals, and playing on a fast growing and fun team, then read on.

The **(Your Company Name)** team is a laid back, yet fast moving and super talented group of "A Players" who are committed to continuous personal and professional growth and making a difference in the world. Join us!

We're currently seeking a Junior Project Manager

What will you do?

In this role, you will:

Be taking a rundown house that has seen better days and redesign it to today's style and charm

Work with designers, vendors and contractors to redevelop houses in the San Diego County area

Take the lead on sourcing new vendors, contractors and Consultants

Perform daily/weekly construction job site walks to oversee progress. Document progress by taking pictures and uploading to drobox or other software

Work with Excel, word doc, email and a variety of programs to set up, organize and manage projects

Verify completion of renovations by creating thorough punch lists

Assist in creating scopes of work for properties needing renovation

Be present at home inspections with our home buyers

Negotiate bids for budget management

Evolve into a full project manager

What competencies/skills MUST you have?

Takes initiative and only needs to be given a project and deadline once without reminders

Very accountable and detail oriented with a strong motivation to grow professionally and personally

Able to "see the big picture" and assess problems as they arise

Resourcefulness to find solutions to problems regarding their projects

Has the drive to take projects and deliver beyond expectations

Must be able to stay organized and develop systems so that others can easily be trained

Disciplined with proven patterns of achieving goals

Must have strong written and oral communication skills with the ability to manage construction professionals as well as new home buyers

Eager to learn and grow as a person and professional

Must thrive in "startup" type environment

Must be a multi-tasking machine

What experience MUST you have for this position?

Strong computer skills with the ability to quickly learn and apply new software Customer Service background is a plus

We prefer you to have experience in the following areas:

Experience in construction and real estate preferred but not required High School Diploma or GED Equivalent. Some College preferred, but not required

Income: Super Competitive

APPLY HERE: (HYPERLINK)

At (Your Company Name), you'll be challenged daily to improve yourself, and take on your position as if it was your own business. You'll be rewarded by working in one of the most fertile environments for entrepreneurial growth on the planet. (Your Company Name) sparks the entrepreneurial spirit to help people live up to their true potential. Are you up to the challenge?

CT Homes Project Manager

- Do you love to take something old and make it new again?
- Is your passion to work in an awesome work environment?
- Are you a self motivated team player?

Would you like to learn from the Owners of one of the fastest growing real estate redevelopment companies featured on A&E's hit TV show_Flip This House?

If you are a tech savvy "people person" with a natural ability to take action, and you are interested in surrounding yourself with growth minded professionals, and playing on a fast growing and fun team, then read on.

The **CT Homes** team is a laid back, yet fast moving and super talented group of "A Players" who are committed to continuous personal and professional growth and making a difference in the world. Join us!

We're currently seeking a **Detail-Oriented Project Manager**

What will you do?

In this role, you will:

- Take a run down house that has seen better days and redesign it to todays style and charm
- Work with designers and contractors to redevelop houses in the San Diego County area

What competencies/skills MUST you have?

- Takes initiative and only needs to be given a project and deadline once without reminders
- Very accountable and detail oriented with a strong motivation to grow professionally
- Able to "see the big picture" and assess problems as they arise
- Resourcefulness to find solutions to problems regarding their projects
- Has the drive to take projects and deliver beyond expectations
- Must be able to stay organized and develop systems so that others can easily be trained
- Disciplined with proven patterns of achieving goals
- Must have strong written and oral communication skills with the ability to manage construction professionals as well as new home buyers
- Eager to learn and grow as a person and professional
- Must thrive in "startup" type environment

What experience MUST you have for this position?

Strong computer skills with the ability to guickly learn and apply new software

We prefer you to have experience in the following areas:

- Experience in construction and real estate preferred but not required
- High School Diploma or GED Equivalent. Some College preferred, but not required

Income: Super Competitive

APPLY HERE: www.FortuneBuilders.com/Careers

At CT Homes, you'll be challenged daily to improve yourself, and take on your position as if it was your own business. You'll be rewarded by working in one of the most fertile environments for entrepreneurial growth on the planet. CT Homes sparks the entrepreneurial spirit to help people live up to their true potential. Are you up to the challenge?

Job Title: Senior Project Manager Overview:

CT Homes is San Diego's premiere residential redevelopment company. Our mission is to rejuvenate neighborhoods and increase the standard of living for San Diego residents. The CT Homes team is a laid back, yet fast moving and is committed to continuous personal and professional growth while making a difference in the world.

We're currently seeking a **Senior Project Manager** to oversee numerous rehabs while keeping an eye on the "big picture". You will work with a team of highly motivated individuals to locate opportunities, competitively bid, oversee succussful residential rehabs in communities across San Diego. You will play an integral part of the company and the growth that will continue to set CT Homes apart from other residential development companies.

Responsibilities:

The ideal candidate will be passionate about carefully cultivating resources and strategically using them to revive distressed properties. You should work with sense of urgency and have unrivaled organizational skills to ensure that work is completed on time, within budget, and to the high degree of quality that CTHomes is known for.

The successful candidate's responsibilities will include, but not limited to:

- Work with designers and contractors to redevelop houses in the San Diego County area from initiation to closure
- Serve as general contractor on behalf of client; initiates and negotiates bids
- Collaborate to outline scope, goals, requireed resources, and timelines
- Effectively manage project scope by ensuring any changes to scope are documented and approved
- Regulates work flow to maximize efficiency, ensures timelines and budgets are met
- Track and report on project milestones and provide status reports
- Continuously source and locate new opportunities
- Recruit new qualified design consultants to work with CT Homes

Qualifications:

- Takes initiative and works well under pressure
- Very accountable and detail oriented
- Ability to effectively negotiate with clients and subcontractors
- Solutions driven with strong ethics and integrity to do the right thing
- Has the drive to take projects and deliver beyond expectations
- Disciplined with proven patterns of achieving goals
- Excellent client-facing and internal communication skills
- Commitment to education in regards to personal and professional development

What education/experience do we prefer you have?

- Bachelor's degree in Construction Managemnt, Civil Engineering, or Architecture highly preferred
- Project Management Professional (PMP), Certified Construction Manager (CCM) or other certification desired
- At least 10 years of combined progressive experience in a Project Engineer and Project Manager role
- Knowledge of construction cost control and basic accounting procedures
- Ability to read and interpret blueprints and building plans
- Knowledge of AutoCAD, Mircrosoft Project, Builder Trend or other building software
- Demonstrated leadership skills with the ability and willingness to handle numberous challenges, solve complex problems and motivate others

About CT Homes

For over a decade, our sister company: FortuneBuilders - has been the premier real estate investment education company in the country and has been ranked by Inc. Magazine's prestigious Inc500 list for three consecutive years as one of America's fastest growing private companies. Here at CTHomes, our mission is to rejuvenate neighborhoods and increase the standard of living by improving the overal quality of housing for the residents.

CT Homes, LLC is the San Diego's premier real estate solutions company, and since our inception we have been helping homeowners along with improving communities in each and every city we work in. Through our extensive knowledge of the business, network of resources, and years of expertise, we are able to assist homeowners with a wide variety of real estate problems. We pride ourselves on our reputation for working one-on-one with each customer to handle their individual situations and being dedicated to give back to our community.

Position: CTH Sales Team Tasks (Listing in House)

Attend all Monday huddle/rehab meetings (2 hours)

All time frames based on a weekly estimate of time and/or per property, this could change based on amount of properties in escrow.

Pre MLS

- 1) Work with Team to make sure data base is up to date with ARV prices and make changes to documents as needed (20 min)
- 2) Fill out mls input lists and install lockboxes (1 hour)
- 3) Follow up on buyer lead calls for properties, invite them to view the property once it's closer to completion if an appt. wasn't already set (1 hour)
- 4) Work with marketing team to make sure all property info is ready for MLS when property is completed (15 min)
- 5) Generate listing agreements for all listings and get signed by owner (20 min)

ACTIVE/PENDING IN MLS

- 6) Make sure tasks are updated and card is updated with listing information and send out to team (20 min)
- 7) Answer second phone # for agent inquiries on properties so Agent has backup if she doesn't answer her cell phone, take messages etc. (30 min)
- 8) Make sure rehab questionnaire is received (10 min)
- 9) Work with done for you marketing to get flyers ordered and deliver to the property (45 min)
- 10) If Blake isn't available attend and host caravans for properties (this will be allocated on a case by case basis), pitch reduced price listings when applicable (4 hours)
- 11) Work in database to upload offer information, upload offers in dropbox, help monitor timelines (30 min)
- 12) Help assemble appraisal packages (30 min)
- 13) Help agent generate appropriate CAR form documents needed during negotiations (depends on the amount of offers 1-2 hours)
- 14) Open Escrow (15 min)
- 15) Help monitor requests for repairs and final walk throughs for buyers/agents (20 min)
- 16) Make changes in the MLS as needed (30 min)

POST MLS

- 17) Help make sure keys are available at closing for buyers, closing email to buyer's agent
- 18) Help update transaction stats (30min)
- 19) Remove lockbox (1-2 hours depending on commute)
- 20) SOLD marketing (if applicable)

Position: CT Homes Sales Team Tasks (Outside listing)

All time frames based on a weekly estimate of time and/or per property, this could change based on amount of properties in escrow.

Attend all Monday huddle/rehab meetings (2 hours)

Pre MLS

- 1) Work with team to make sure database is up to date with ARV prices and make changes to documents as needed (20 min)
- 2) Attend initial meeting with agent listing property so introduction to team is clear (1 hour)
- 3) Send agent rehab dept punch list and make sure they go out to property within 2 days and get us any feedback in a timely manner, keep outside agent updated on when property will be done (30 min)
- 4) Work with agent to generate listing agreements, check for accuracy, and get signed by owner (30 min)

ACTIVE/PENDING IN MLS

- 5) Make sure databas tasks are updated and card is updated with listing information (15 min)
- 6) Make sure MLS listing is sent to us, checked for errors and send out to team once all is confirmed accurate (15 min)
- 7) Make sure rehab questionnaire and scope of work is received and sent to outside agent (20 min)
- 8) Help manage offers coming in, writing counter offers with outside agent (depends on amount of offers-1-2 hours)
- 9) Send agent open escrow instructions (10 min)
- 10) Work to upload accepted offer information, upload offers in dropbox, help monitor timelines (30 min)
- 11) Coordinate inspection with outside agent and rehab dept (10 min)
- 12) Help assemble appraisal packages to send to outside agent, make sure outside agent attends appraisal or step in to attend as needed (30 min)
- 13) Help monitor requests for repairs, communication between rehab dept and outside agent, and final walk throughs for buyers/agents (1 hour)

POST MLS

- 14) Help make sure keys are available at closing for buyers, closing email to buyers agent (20 min)
- 15) Make sure outside agent has contractor LB code when they remove their lockbox (5 min)
- 16) Help update transaction stats (30 min)
- 17) SOLD marketing (if applicable)



LICENSED TRANSACTION COORDINATOR JOB DESCRIPTION

CORE RESPONSIBILITES:

The Licensed Transaction Coordinator is willing to go "above and beyond" and is excited about the opportunity for growth and expansion; also is someone who thrives in a fast-paced work environment. A highly detail-oriented and systematic individual that helps our team service our clients with seamless, top-notch customer service from contract-to-close. Compliance with all forms, deadlines, contingencies and protocols will be the primary focus. Creative problem solving, exemplary customer service and negotiation skills are necessary. The Licensed Coordinator's main priorities are ensuring that the many details and deadlines are met to ensure a smooth transaction, while maintaining strong communication with all parties involved.

ESSENTIAL FUNCTIONS AND RESPONSIBILITIES:

- Manage Private Money Lender process including but not limited to coordination, communication, preparation of promissory notes, recordings and extensions.
- Manage Line of Credit process from submission, docs, funding, close and post-closing.
- Act as a liaison between clients and team.
- Provide daily updates and status to the team via Podio platform.
- Manage contract to close process for acquisition and flip side.
- Create and maintain an operations manual that documents all systems and standards.
- Be the first point of contact in handling customer inquiries and complaints.
- Keep team informed about challenges and issues that need to be handled.
- Provide concierge level customer service to clients, customers and team.
- Prepare Real Estate Documents (contracts, amendments, disclosures) for Sales Team to allow more time in the field.

REQUIREMENTS:

- California Salesperson License.
- California Notary License.
- When faced with a challenge uses high abstract reasoning to bring unconventional solutions (not accepting of "no" or the standard way of doing things).
- Excellent written/verbal communication skills.
- Knowledgeable on real estate contracts, disclosures, state, county and city requirements.
- Technologically savvy and able to learn new programs quickly and able to troubleshoot common issues; proficiency in Word, Excel, Power Point, PDF Editor, Google Chrome, Dropbox, Gmail, Google Drive, Podio, Sandicor, CAR, Zipforms, Docusign.
- Have excellent attention to detail and high-level accuracy with documents.
- Concerned with doing things the right way the first time.
- Positive can-do attitude, where there is no task too big or too small to take on.
- Flexible in daily routine; ability to prioritize and manage shifting responsibilities.
- Deadline driven and extremely organized.
- Excellent customer service and interpersonal skills; can empathize and build relationships with a variety of personalities.

KEY PERFORMANCE INDICATORS:

Growth and profitability of the company as measured by the company's execution rate.