

Establish Your Foundation

DMB Conversation Guide/Checklist

Talk with your Designated Managing Broker to understand office policy, expectations, available training and resources. Use this information to build a foundation that supports your plans for successfully running your business and serving clients.

Below is a guide to make your conversation productive!

PREPARE

- Think about your goal(s) for the conversation and the topics you want to cover with your Designated Managing Broker. Jot down questions in advance.
- When scheduling the meeting with your Designated Managing Broker, send an agenda, include your goals for the meeting and topics you'd like to cover so they can be prepared.
- If available, read the office policy in advance of your meeting.

THE MEETING

- State your goal(s) for the conversation.
- Ask about the company policy. Were there areas you didn't understand, or that require clarification? If you haven't received a copy yet, request one.
- Ask about available marketing tools that may be provided. How are they accessed? What tools are available?
- What, if any, training is provided or available? How is it accessed? Is it required?
- Is a transaction management system available, recommended? Which one(s)?
- Does the office have a preferred partner list of attorneys, title companies, lenders?
- How will you work with your Designated Manager Broker on escrow, earnest money, negotiations, contract?

MEETING FOLLOW-UP

- Send a thank you/recap note to your Designated Managing Broker summarizing the discussion – especially items or areas that required mutual agreement or understanding.
- Take any immediate actions that arose from the conversation.
- Use what you learned in your business – create action plans and calendars to help keep you on track.

