



MV REALTY

# New Agent Orientation Overview & Expectations

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# Orientation Week



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About Us

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Training Schedule & Expectations

New Agent KPI's

MV Realty Online Resources

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# About Us

## THE COMPANY & THE VISION

MV Realty is a new age real estate brokerage created by seasoned, technologically savvy, real-estate professionals to meet the needs of the modern broker, buyer, and seller. Providing an efficient, smart way to conduct real estate transactions.

- Established in 2014
- Homeowner Benefit Program started in 2018
- Exponential growth in 2020
- HQ in Delray Beach; 33 States open

• AZ • AK • CA • CO • CT • DE • FL • GA • HI • IL • IN • IA • KS • KY • LA • ME • MI • MN • MO • MS • MT • NE • NH • NJ • NY • OH • OK • OR • PA • RI • SC • SD • TN • TX • UT • VT • WA • WI • WV • WY

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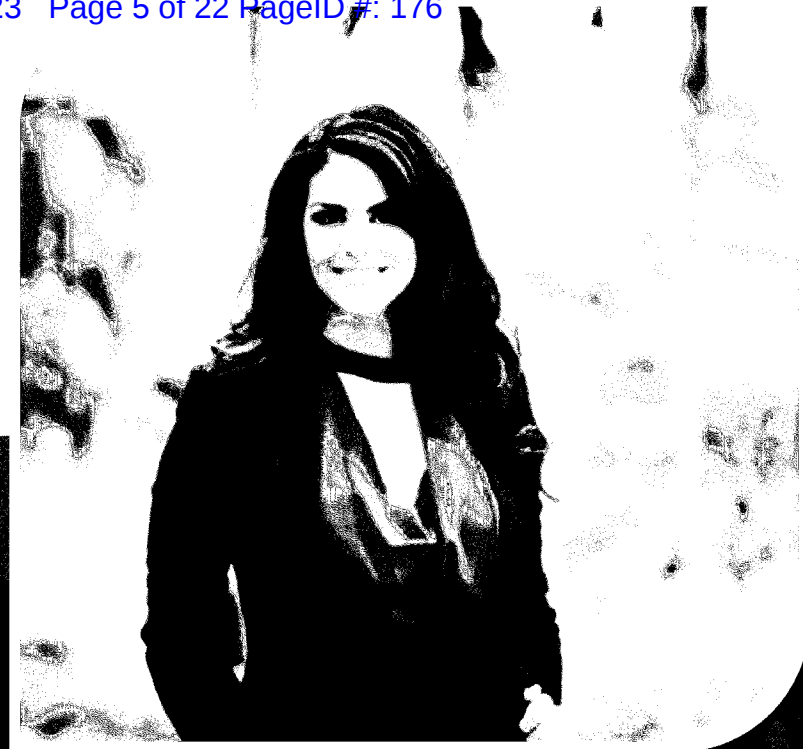
Schneider Depo. Ex. 1

#22.441



AMANDA ZACHMAN

*Managing Broker/Co-Founder*



*Amanda Zachman is one of the founders, and Executive Director of MV Realty. She also is the lead broker of many of our offices. Amanda has an extensive background in real estate and a passion for success.*

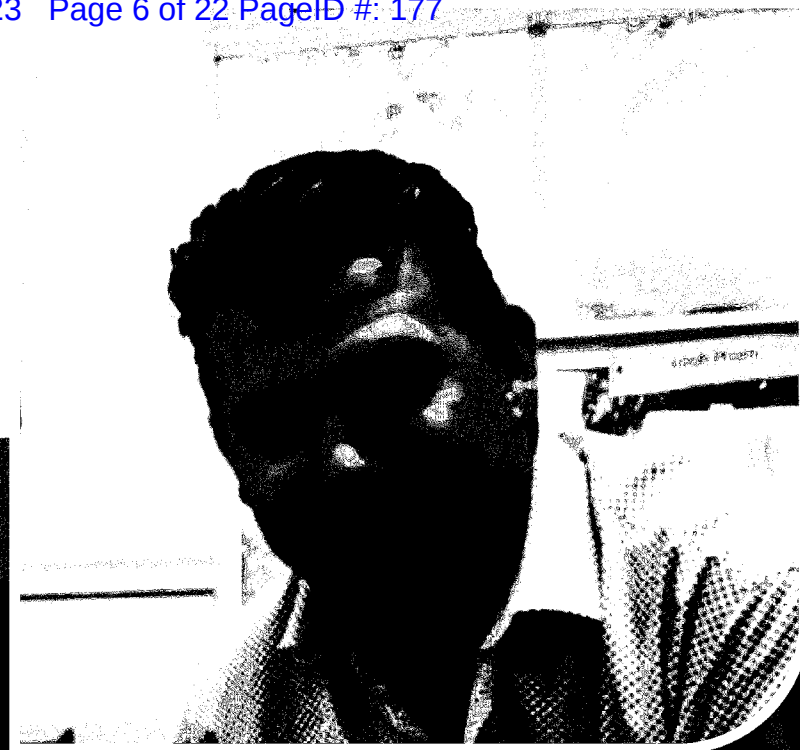
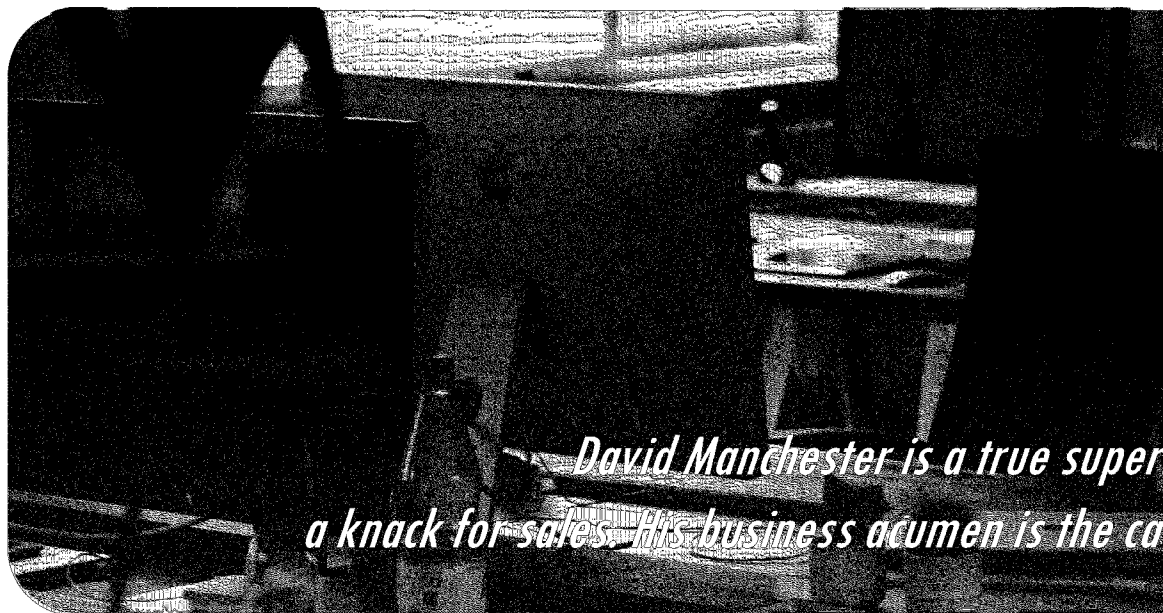
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DAVID MANCHESTER

*Chief Operating Officer*



*David Manchester is a true superhero who has  
a knack for sales. His business acumen is the catalyst to our team's success.*

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STEVEN KRUEGER

*IT and Operations Support*



*Having Over A Decade Of Experience In Sales Operations, Steven Is Dedicated Toward Improving Client Experiences And Maximizing Workflow Roadmaps Across The Nation.*

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JOSEPH SHAIA

*Operations Manager*



*Having 17+ years of sales and real estate management experience,  
Joe is dedicated to your success and ensuring you achieve your  
maximum potential*

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# MV Realty Training Department

- As A Previous Agent Herself, She Has Over 2 Years Of HBA Experience.
- She Is Here To Train And Guide You Every Step Of The Way To Achieve Success As An MV Realty Sales Agent.
- Sydney is a college graduate from the University of North Florida she is new in the real estate industry but will bring her administrative experience, positive attitude, and strong work ethic to encourage others to work hard and succeed.
- Melinda Is A Seasoned, Bilingual, Real Estate Professional whose role is to offer knowledge and experience to train, support and ensure your success!

National Sales  
Manager



National Sales  
Manager



National Sales  
Manager



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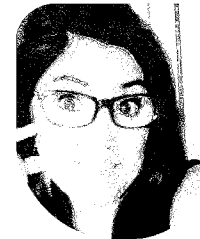
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# Agent Sales and Operations Team



*Leonel Sanchez*

Leo brings a history of sales and marketing to provide guidance and support towards your professional development and continued success.



*Mechelle Martin*

**Agent Support**

With over 20 years of Real Estate Experience, Mechelle is a wonder of support and resolve for you.



*Chad Stice*

**Agent Support**

Driven with High-Energy, Chad is among the best at solving challenges in the Real Estate Industry for you.



*Valerie Lawrence*

**Agent Support**

Helping you to change the world's perception of a typical Real Estate Agent.



*Jessica Chase*

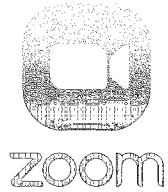
**Agent Support**

She loves helping others achieve their goals and loves being part of the Agent Support Team at MV.

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# Training Expectations



## Zooms Sessions:

*All content taught live Monday - Friday 11am-6 pm*

- Be present for every session, all day
- In a working environment
- Fully engaged with cameras on at all time
- Same link each day



Google form for questions

(digital hand if urgent)

Easily accessed with this link:



Slack utility

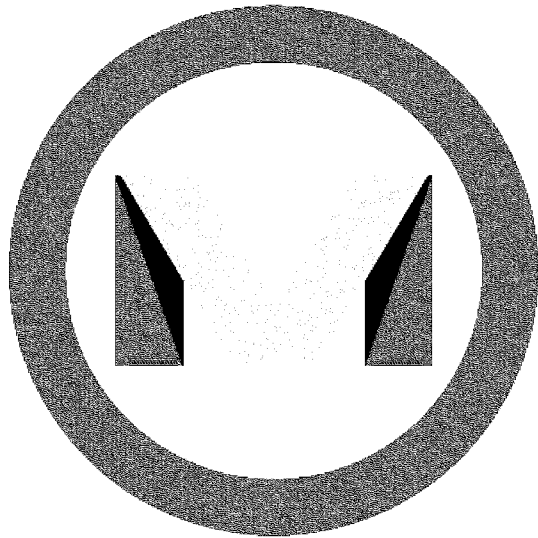
Asking Questions/Posting

Answering questions on slack

***Tell Me and I forget, teach me and I remember, involve me and I learn - Benjamin Franklin***

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MVR REALTY LLC

# Resources & Communication Tools

Google Drive  
Slack

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- Trinet
- Understanding the draw
- HBA-overview, key terms
- Call Scripts
- Inbound Calls
- Underwriting
- Quiz

- Valuations
- CRM Basics: Part 1
- Payments
- Mock Calls & Obj. Handling
- Appt. & Notary Mngmt.
- Quiz

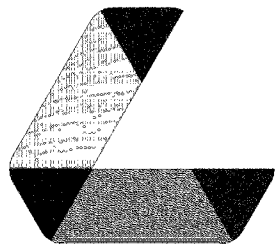
- CRM basics Part 2
- Live Lead Claim
- A Day in the Life
- Transaction Coordinators
- Quiz

- Wrap up/set expectations
- CRM
- Live lead claim
- Inbounds
- Mock call
- Quiz

- Dotloop
- Meet Your ASM's
- Joe's intro
- Q&A
- Final test

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# Google Drive:

RESOURCES AT YOUR FINGERTIPS

## HBA by State

My Drive > Documentation > HomeOwner Benefit Agreement Docs State

AL - Homeowner Benefit ...	AZ - Homeowner Benefit ...	CA - Homeowner Benefit ...	CO - Homeowner Benefit ...	CT - Homeowner Benefit ...
FL - Homeowner Benefit ...	GA - Homeowner Benefit ...	ID - Homeowner Benefit ...	IL - Homeowner Benefit P...	IN - Homeowner Benefit ...
KS - Homeowner Benefit ...	LA - Homeowner Benefit ...	MA - Homeowner Benefit ...	MD - Homeowner Benefit ...	MI - Homeowner Benefit ...
MN - Homeowner Benefit ...	MO - Homeowner Benefit ...	NC - Homeowner Benefit ...	NEW AGENT HBA COLLE...	NJ - Homeowner Benefit ...
NV - Homeowner Benefit ...	NY - Homeowner Benefit ...	OH - Homeowner Benefit ...	OK - Homeowner Benefit ...	OR - Homeowner Benefit P...
PA - Homeowner Benefit ...	SC - Homeowner Benefit ...	TN - Homeowner Benefit ...	UT - Homeowner Benefit ...	VA - Homeowner Benefit ...
WA - Homeowner Benefit ...	WI - Homeowner Benefit ...			

Direct link to Google drive is in the CRM under "documentation"



## Live Walk through of New Agent Resource Guide



Direct link to CRM User Guide

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# Split into 2 Groups

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# New Agent Key Performance Indicators (KPI's)

Activities & Results

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# Activity KPI's

## Setting you up for success:

Operations Manager Joe Shaia to contact you Monday, post orientation

- ❖ All States have an assigned Agent support manager
  - ❖ ASM's reach out Tuesday following training
    - ❖ Assess activity/production, reiterate expectations, set new goals
  - ❖ ASM's reach back out the following Monday to check in

## What we expect:

- Consistently claiming a MINIMUM of 30 Leads Daily
- 150 Claimed Leads Weekly
- Follow up call with leads claimed
- 2 appointments/wk
- Take a MINIMUM of 15 Inbounds weekly
  - Do NOT Count Towards Lead Claim\*
- Agents be available and on the phone for **ALL** Signings
- Working Hours:
  - Monday - Friday 9 am - 6 pm local time
  - Production assessed through daily reporting
- Measures: claims, calls, contacts, appt. created, signing ratios

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# Payroll & Human Resources

- W2 Employees – with benefits at 90 days
  - All commissions taxed, including traditional RE
    - Traditional &HBA RE commissions are separate from HBA
    - RE commissions don't apply to your HBA deficit, if any
- Direct deposit or Check (you set this up in TriNet)
- Paid twice a month
- Calendar location in google drive
  - Cutoff days and Paydays
- Paid by a draw, an advance on future commissions
  - NOT salary OR salary

Payroll Calendar

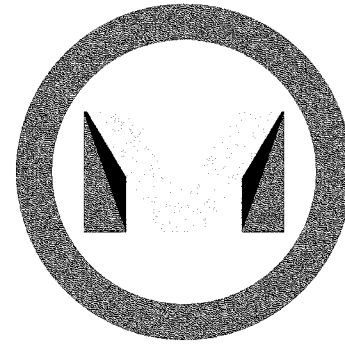
Contact info:

**CLASS OF 3/28/22:**

**CUT OFF DAY IS TUESDAY April 15th**

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MAY REALTY

**Thank you for your  
time and attention!**

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## MV Realty Offer Email

carel

Tue 5/25/2021 11:41 AM

Dear Carrie,

We would like to offer you the position of Real Estate Sales Associate with MV Realty! We believe you have what it takes to be successful working with us. If you accept, you will receive the following compensation:

- A draw of \$750/week, written against the Homeowner Benefit Agreements (HBA) produced.
- Commission of \$500/HBA.
- Eligibility for company health insurance (health/dental/vision) after completion of 90 days employment as a W2.

Additionally, the commission structure for real estate listing transactions are as follows:

- Personal deals (your own lead): 80%
- Corporate deal (buy/sell with lead we provide you): 50%
- HBA Sell (HBA Client sells home): 10%
- HBA Double-end deal: 30% on the buy-side of transaction
- Follow-on purchase (HBA Client buys with us after selling home): 50%

Feel free to reach out to Hayley Martorana, she is one of our agents in MA [REDACTED]

Please let us know if you accept this offer.

If you accept this offer, please check your inbox and/or spam folder for the onboarding documents from DotLoop.

We are excited to have you on board and look forward to your future success!

Sincerely,



**Carel Fernandez**

**MV Realty**

P: [REDACTED] 88

A: 219 N Dixie Blvd, Delray Beach, FL 33444

W: <https://www.mvrealtyfl.com/E:Carel@homesatmv.com>





# New Agent Quick Reference Guide

## HBA Resources

- [New Agent Training Presentation](#)

## CRM Resources

- [CRM Workbook](#)

## Scripting Resources

- [Call Scripts Training Presentation](#)

## [Payroll Calendar](#)

## [Dotloop Resources](#)

## [Order Business Cards & Yard Signs](#)

## [ASTUTE M Cheat Sheet](#)



## VIDEOS:

- **[HOMEOWNER BENEFIT PROGRAM](#)**
- **[RECRUITING VIDEO](#)**

Password = Work@MV



### Additional CRM & Valuation Resources:

- [How to DNC a Lead](#)
- [Claiming & Dispositioning a Lead](#)
- [Valuation Sequence 1-Pager](#)
- [Valuation Video \(RPR, CRM, Remine\)](#)
- [Creating & Submitting An Offer, Client Signed, Uploading Contract, Requesting Funding - FULL VIDEO](#)
- [What Happens Between Offer Submission & Active Contract](#)
- [Uploading the Signed HBA](#)
- [Requesting Funding \(via Zelle\)](#)
- [Using the Activity Wizard](#)
- [New Lead Follow-Up Guidelines](#)
- [Zelle Test Presentation](#)



### Additional Scripting Resources:

- [Mortgage Description](#)
- [Sample Inbound Call Scripting](#)



### Payments Resources:

- [Client Payment Methods & Timeline](#)
- [Payments Training Presentation](#)



### Signing Resources:

- [Signing Checklist](#)
- [Online Notarization Resources \(FL, NJ, PA ONLY\)](#)



### Text & Email Templates:

- [Sample Email Template - After Contacting Client](#)
- [Sample Email Template - No Contact](#)



### Underwriting Resources:

- [Underwriting Training Presentation](#)
- [Rejection Codes & Resolutions](#)
- [Communicating Via Offer Notes/Email](#)
- [Notary Assignment Tip](#)

**Need Support? Try...**  
**Schneider Depo. Ex. 3**



### [Slack User Guide](#)

#NewAgentTraining Channel  
#Helpdesk Channel  
#StateSpecific Channel

Good afternoon CLIENT!

I'm happy to tell you that we do have an \$XXX Cash payment for you and OTHER HOMEOWNER as the homeowners of 123 MAIN STREET, which we can have available to her as early as tomorrow.

We have hundreds of happy homeowners in our Homeowner Benefit Program and I'd like to include you!

We are a **5 Star Rated Brokerage** - you can view our ratings and testimonials on Zillow, [www.zillow.com/profile/MVRealty](http://www.zillow.com/profile/MVRealty)

You can also visit the following websites that will provide you with more information on our Brokerage:

[www.Homesatmv.com](http://www.Homesatmv.com)

[www.HomeOwnerBenefit.com](http://www.HomeOwnerBenefit.com)

Lastly, you will also find that we are an **A+ Accredited Business with the Better Business Bureau**. Visit their website here:

<https://www.bbb.org/us/fl/delray-beach/profile/real-estate/mv-realty-pbc-llc-0633-90370741>

Our goal is to establish a relationship with current homeowners and future home sellers! We believe that investing our marketing dollars towards establishing a relationship directly with our potential clients is far more valuable to us than spending those same dollars towards radio ads, tv commercials or additional social media presence.

**Three important things to note about the funds you will receive:**

1. The money we offer you is NOT a loan - meaning, you NEVER repay these funds. It is a true incentive!
2. There is no credit check.
3. You are NOT obligated to sell your home EVER! If you never sell your home, the money is still yours to keep!

**Feel free to contact me at your convenience at YOUR TEL #, so that we can discuss and coordinate all of the details.**

I look forward to assisting you!