Policy and Procedures Manual
Panama City Real Estate and Property Management, LLC

Date: 8/17/2008
Responsible Department: Operations and Technology

- **Introduction**

  The purpose of this document is to provide members and agents with a set of standards and policies which will assist them in providing standardized customer service for the Panama City Real Estate and Property Management, LLC and team.

  All members/agents are required to read/review and sign acceptance of this document at time of membership.

- **Company Philosophy**

  Our mission is to provide the public with quality Panama City Florida Real Estate services! We accomplish this mission by providing the finest customer service, most advanced technology available and adhering to a strict code of ethics.

  This philosophy will enable our company to exceed the philosophies and policies of our peers and establish us as a leader in the Panama City and Bay County real estate market.

- **Agency**
  - All members are to adhere to transaction broker agency with all customers unless otherwise instructed by Jennifer Mackay and/or Jessie Cochran

- **Broker**
  - Our current broker of record is
    - Charlie Brown, Keller Williams Success Realty - 2110 W. 23rd Street Panama City, Fl 32405

- **Commissions**
  - See individual agent contract for commission information

- **Conduct/Expectations**
  - All members/agents are expected to conduct themselves in a business like manner at all times
  - All members/agents are required to have and maintain the following at all times:
    - Business cards
      - Must show agent name and contact information
      - Brokerage name and address
      - Team name
    - Full time internet access with email ability
    - Working Computer not to be used by anyone else
      - Computers must contain the following software
        - Anti virus software
        - Word processor
        - Spreadsheet
        - Adobe Reader
        - Desktop publishing software
        - Email reader/sender program
        - Graphics/multi-media creation program as needed for flyers, handouts, printed materials, movies, podcasts and others as needed to fulfill their obligations to customers and the company.
    - Automobile in working order and kept clean of debris
    - Working cell phone

- **Expenses**
  - Refer to Independent Contractors Agreement for details
- **Forms, Equipment & Supplies**
  - All forms, equipment and supplies are financed and approved by our technology department.
  - Refer to Independent Contractors Agreement for details

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- **Confidentiality**
  - All members are required to sign a Non disclosure form and are required to maintain a strict level of confidentiality for all customer and in house data and information.
  - Refer to Independent Contractors Agreement for details
- **Discrimination**
  - It is unlawful and unethical to engage in any form of discriminate based on race, creed, color or other criteria.
- **Education**
  - Training assistance is provided on an as needed basis.
  - Refer to Independent Contractors Agreement for details
- **Dress**
  - Members are required to dress appropriately for all occasions. Appropriate dress is defined as that appropriate for a given occasion. Business appropriate is standard dress however, business casual is permitted during non customer relations and functions.
- **Floor Time**
  - We do not require our members to take floor time.
  - Members make their own schedules and are required to be available on an as needed basis based on customer need.
- **Listings**
  - All listings are listed under Jennifer Mackay and as such will remain with Jennifer Mackay at all times, including agent contract expiration or agent dismissal.
- **Referrals**
  - Refer to Independent Contractors Agreement for details
- **Keys, Signs & Lockboxes**
  - Lockboxes are provided by Jennifer Mackay. Keys are to be provided by the agents. All signage must contain both the broker name and Jennifer Mackay.

- **Smoking**
  - Smoking is permitted in designated areas as allowed by law.
- **Automobile**
  - All automobile expenses are to be paid by agents.
  - Automobiles are to be kept clean, neat and in good working order at all times.
  - Refer to Independent Contractors Agreement for details.
- **Telephone**
  - All telephone expenses are paid by agents.
  - Refer to Independent Contractors Agreement for details
- **Office Hours/Holidays**
  - We are open for business 365 days a year including all holidays as required by our customers
  - Members/Agents are permitted personal time as long as it does not conflict or interfere with customer needs, company requirements and must have prior written approval before taking any time off.
- **Sick/Vacation/Personal Time**
  - Members do not accrue and are not paid for sick days, vacation days or personal time.
- **Independent Contractor Agreement**
  - All members are required to sign an Independent Contractor Agreement prior to becoming a team member.
- **Resolving Disputes**
  - All internal disputes are to be settled by Jennifer Mackay and/or Jessie Cochran. Any real estate related dispute is to be settled by Charlie Brown, Broker or FREC as needed.

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- **Confidential Lead Generation Model**

  When given an internet, the following steps are to be employed to quickly categorize and analyze the leads potential.

1. Analyze the lead – Log on to the http://www.jennifermackay.com/backend/index.php, and select the lead to be analyzed. Using the tabbed sheet Lead Details from left to right accomplish the following: Copy the lead information into your preferred email program, note any special information or comments in the Comments section of the summary.
2. Next select the Edit tab and complete the following:
   a. Change the lead status to accepted
   b. Enter any additional information in to your tracking database
3. Next select the History tab and note the visitors sequence of events
4. Next select the Listings tab and note any saved listings the visitor has selected
5. Next select the Searched tab and note any saved searches the visitor has saved. If any exist, select the search and analyze what property they are looking for.
6. Next select the Tracked Visits – If there is little to no information on the previous tabs, this is where you will perform your in depth analysis of the visitor. This tab should have hypertext links which you can hover your mouse over and/or click to see the visitors visit. These links include
   a. How the visitor arrived at the site
   b. Each page the visitor visited
   c. The searches the visitor executed
   d. The details of properties they viewed
7. Now that you know how they got here, what they've looked at you can analyze and contact the lead with vital information.

8. Once the analysis is completed on a lead, you MUST contact that lead quickly with an email. If there is a phone number all the better.

9. Send out a well-thought out custom welcome email and make an initial phone call (if possible) to qualify the lead and to demonstrate good customer service.
   a. Ask if they would like you to set up a customized search for them matching their criteria
   b. Log into the backend, select the lead and the Notes tab and enter details regarding the contact email (date etc)

10. If no response from the lead within 3 days, send a second email with any of the following:
    a. additional detailed information regarding other properties that match their criteria (mls/site search?)
    b. Insurance and tax information etc.
    c. Shopping, schools etc information
    d. Ask if they would like a free no obligation community report (from top producer)
    e. Additional information as you deem necessary
    f. Log into the backend, select the lead and the Notes tab and enter details regarding the contact email (date etc)
11. Following the second email, if no response within 3 days send an email thanking them for visiting the website and offer any additional assistance.
    a. Log into the backend, select the lead and the Notes tab and enter details regarding the contact email (date etc)
12. If within 3 days following the third email, return the lead to Jennifer for inclusion on a slow drip campaign and flag the lead as cold.
    a. Log into the backend, select the lead and the Notes tab and enter details regarding the contact email (date etc)