

# AEI INSTITUTE

MARCH 17-20, 2023 | SEATTLE, WA



NARRealtorParty



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**#NARAEI2023**

**JESSICA COATES**

**CHIEF EXECUTIVE OFFICER**

*REC, CIPS, C2EX, AHWD*

SACRAMENTO ASSOCIATION OF REALTORS®



**NATIONAL  
ASSOCIATION OF  
REALTORS®**

*Practical Tips for Today,  
Leadership Strategies  
for Tomorrow*

# **AE Fundamentals: I'm a New AE, Now What?**

# Who is . . . Jessica Coates?



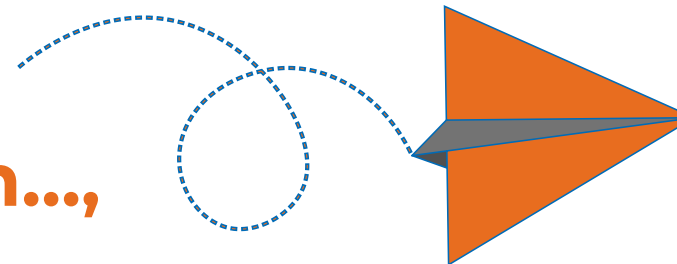
- ✓ 2023 NAR Association Executive Committee Chair
- ✓ REALTOR® Association Executive since 2014

VP of  
Government &  
Community  
Affairs | 4 Years

CEO of the Howard  
County Association of  
REALTORS® | 4 Years

NEW CEO of the  
Sacramento  
Association of  
REALTORS®

In Transition Again...,



# WHAT I WISH I KNEW

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WHEN I WAS A NEW AE...

PRACTICAL TIPS AND TOOLS FOR RIGHT NOW!



TAKE A DEEP  
BREATH



# Take the Time to Learn Understand YOUR Association Culture

## PRACTICAL TIPS AND TOOLS FOR RIGHT NOW!

### What is your Association Culture?

1. The attitudes and behaviors of staff/ leadership.
2. Shared identity and beliefs about Association purpose and why they exist.
3. Procedural norms that include;
4. Policies, procedures, ethics, and values.

### How can I learn and understand?

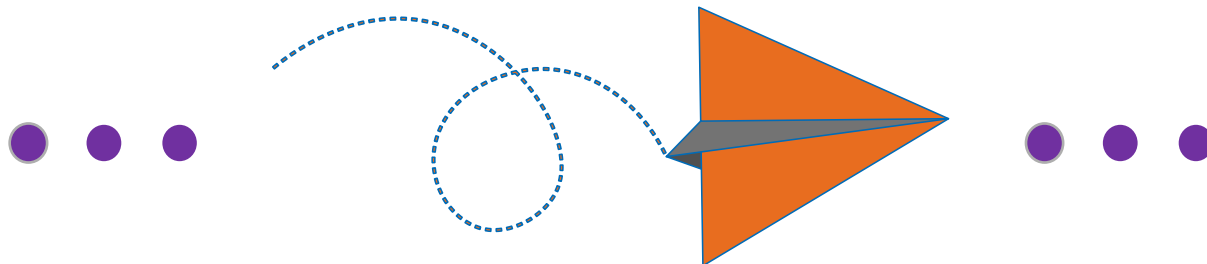
1. Talk to your staff and volunteer leadership.
2. Conduct field visits to Brokerages and Preferred Partner Offices. (Get to know your members)
3. Gain a deeper understanding with member surveys, MI demographical data, and focus groups.
4. Role Clarity (Who does what and why?)

**CHEAT TIP: Download the NAR  
President/Chief Staff Executive Checklist!**

# Policies are your friend

## PRACTICAL TIPS AND TOOLS FOR

- Policies are formalized culture statements
- Align bylaws and policy manual
- Strategic and business plans
- Become familiar with governing documents (local, state, NAR, COE)



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# What is Value Proposition

## Can You Articulate it???

### ① WIIFM (What's In It For Me?)

- ✓ Help me make more money, secure more deals, gain more clients
- ✓ Represent my interests on issues critical to my business
- ✓ Protect me
- ✓ Make life easier for me

### ② Value is a moving target

### ③ What are your core services, and do they fill the need?

- ✓ Continuing Education & Electives
- ✓ Advocacy
- ✓ Networking Opportunities
- ✓ Products and Services
- ✓ Community Service

# Work smarter, not harder

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## PRACTICAL TIPS AND TOOLS FOR RIGHT NOW!

- Gather and analyze information/ data
- Utilize systems to make your job easier and more effective
- Leverage resources through collaboration (other AEs are your friends!)
- Delegate appropriately to your staff and respect their strengths



# Financial Health is Vital

**\*The Association's Financial health dictates everything\***

**(Operations, Staff recruitment/retention, member resources, growth potential)**

- **Protect and Manage Resources**
- **Annual Audit and/or Review (core standards)**
- **Transparent Financial Reporting**
- **Diversify Revenues**

# Go social, go mobile

**PRACTICAL TIPS AND TOOLS FOR RIGHT NOW!**

- **Utilize social media (meet members where they are)**
- **Website Design, experience, content**
- **Email still #1 but embrace text and other ways to communicate**

# Embrace Diversity and Inclusion

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\*Embracing the diversity within your membership helps staff interact more effectively with members from different cultures, backgrounds, and experiences. Cultural competence helps drive initiatives and programming to increase value, growth, and improve how we can serve EVERYONE better.\*

## 1. What is the Makeup of your Membership? Board of Directors? Staff? Leadership?

*Additional Things to Consider: Brokerage Sizes, Part-time agent ratio, Bilingual, hearing impaired*

## 2. New Leaders are in Plain Sight

## 3. Core Standards Requirements

## 4. Prioritize DEI Education and Training as standard professional development for you, Staff, and Association Leadership

**CHEAT List: Implicit Bias Training, At Home w/ Diversity, Fair Haven, NAR Actionable Road Map, Color of Law**

# Volunteer Leadership

## PRACTICAL TIPS AND TOOLS FOR RIGHT NOW!

- The backbone of your organization
- Board of Directors (BOD) Culture; board orientation
- You won't always agree; Be Flexible
- BOD self-assessment
- Identify new leaders

# Build, Nurture & Invest in your DREAM TEAM

## PRACTICAL TIPS AND TOOLS FOR RIGHT NOW!

- **Learn HR basics**
- **Hire the best (hire slow, fire fast)**
- **Learn to delegate**
- **Train, pay and mentor**
- **Performance evaluations and development**



# It's Okay to be overwhelmed

## PRACTICAL TIPS AND TOOLS FOR RIGHT NOW!

- **Tell your leadership**
- **Ask for help**
- **Talk to a mentor**
- **Keep things in balance**

# Members are watching you

1. Be a volunteer
2. Practice what you preach
  - Be prepared; show up on time
  - Pay Attention
  - Keep confidential matters confidential and disclose conflicts
3. Association events, social events, online (social media)
4. Be Ethical, truthful (oh yeah, don't steal!)
5. Have a servant spirit; lead with empathy

# Learn the Industry

## PRACTICAL TIPS AND TOOLS FOR RIGHT NOW!

- ✓ Read and stay connected with Industry Trends and updates
- ✓ Training through local resources
- ✓ AE Institute
- ✓ Find Mentors

# Expect the Unexpected

## PRACTICAL TIPS AND TOOLS FOR RIGHT NOW!

- Bad things happen to good people
- Stay Calm
- Marshall your resources
- Everyday is a potential press conference 😊

Jessica Coates, RCE, CIPS, C2EX, AHWD  
Chief Executive Officer

Sacramento Association of REALTORS®  
[Jessica@sacrealtor.org](mailto:Jessica@sacrealtor.org)  
916-205-6096

# THANK YOU.



NARRealtorParty



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## #NARAEI2023

**THAT'S WHO WE** 

 **NATIONAL  
ASSOCIATION OF  
REALTORS®**