



THE ADVANTAGE PROGRAM

# TRAINING MANUAL

## TABLE OF CONTENTS

|  |             |
|--|-------------|
| Cover .....  | 1           |
| Table of Contents .....  | 2           |
| Introduction, Positioning, TAP Resident Video and Website..... | 3           |
| <b>How TAP Works.....</b>                                      | <b>4</b>    |
| Resident Benefits .....  | 5, 6        |
| <b>QUICK TIPS (Marketing workflows).....</b>                   | <b>7, 8</b> |
| Resident Referral Follow Up Protocol .....                     | 9           |
| Scripts: Call, VM, Email, Text.....                            | 10, 11      |
| Notifications.....   | 12          |
| Tasks.....   | 13          |
| Assigning a referral to another agent, Marketing opt out.....  | 14          |
| TAP Portal Access .....  | 15          |
| Dashboard.....   | 16          |
| Resident Search “ Look Up”.....                                | 17          |
| Resident Profile Page .....                                    | 18          |
| Notes and Notifications .....                                  | 19          |
| Activities / Tasks .....                                       | 20          |
| Deals (Add) .....  | 21, 22      |
| Deals (Edit) .....   | 23, 24      |
| Closing / Referral Fees / Payment of Referral fees .....       | 25          |

## Real Estate Agent Training Manual

The Advantage program protocols are proven to work and will help you achieve success.

You are part of a team that consists of; TAP software and Marketing, K-DUB HUB training and Support, Multifamily property management companies, property managers, Leasing and other Staff, and a preferred national lender.

### **One of the most important aspects of TAP is that this is a customer experience program**

- Everything we do is in the best interest of the Resident and PMC. Always look at it from the point of view of the property management company and the resident.
- **Resident Experience:** “We appreciate you as a resident but should you decide to purchase a home we want to be there for you.”
- A significant portion of residents buy. When they are ready they will buy with us. “The right place at the right time” Nothing should be forced upon anyone.

[Tap Resident Video?](#)

[Resident Landing Page](#)

## How TAP Works

TAP has relationships with property management companies that allow us to market to their residents, to purchase a home when they move out, as long as we do it professionally and without pressure.

TAP marketing protocols start while the prospective renter is looking and follows each resident from move-in through their entire lease period, including renewal. There are multiple marketing avenues that include email, text, personal contact and more.

1. TAP sends you referrals. You and the preferred lender team up to follow up and close them.
2. The resident buyer receives a financial benefit towards closing costs for working with both of you.
3. TAP brokerage receives a referral fee, you receive a commission and the PMC receives benefits from TAP.

### Once you have received a TAP lead / referral

When a referral is generated A task is automatically created and you are alerted. The task populates on your dashboard and on your prospect/leads tab. (speed to lead is important - reach out quickly)

- All uncompleted tasks show up on your dashboard, behind the task button and on the client profile page. Mark the task complete when completed to avoid clutter.

On the prospect/leads tab, the lead type is “active buyer” and will remain “active buyer” until moved to another lead type. The Lead Types are: "active buyer", "app taken", "pre approved","under contract" and "closed". The lender changes to App taken and Pre approved. R.E. Agent changes the others.

- TAP marketing reaches out to the referrals by email and text throughout the stages. Please DO NOT add them to any of your marketing streams. (Stay within the spirit of our PMC agreement.)

Once you connect with the referral and they indicate they are interested in purchasing anytime in the future you create a deal.

- The deals page is where you work all of your referrals from that you communicated with.
- The prospect/leads tab is where they sit until you connect.

To set follow ups for you or your lender create a task and assign it.

- Avoid creating and sending the lender too many tasks, as this may overwhelm them but definitely send one when important. You can also send a notification without creating a task.

When the buyer goes under contract, change the stage by editing the deal.

When the deal closes, update the deal.

When you have dead leads, create a deal then mark it closed lost.

## Resident Benefits

Know the resident benefits for each community you work with. They may vary. Benefits can be found on the [resident profile page by clicking on the dropdown arrow at the top](#) by the resident's name or by [clicking the property name on the Prospects / Leads tab](#).

Buyers must be aware of how the incentive applies as early as possible in the relationship. This should occur in the first conversation and a reminder as you continue the relationship. The lender will do the same.

### TAP Resident Closing Cost Benefit

- [Up to \\$1295 - \\$2195 towards closing costs.](#)

### TAP preferred real estate agent resident benefit - \$500.00

You are the preferred real estate agent for the TAP program for your communities.

- \$500 from the real estate brokerage gross commission goes towards closing costs.
  - \$500 is deducted from the brokerage gross commission before anyone is paid.
  - Example: \$10,000 gross commission - \$500 = \$9500 = The net commission.
  - This must be disclosed to the preferred lender as early as possible in the process.
  - [Buyer must use the preferred agent as their Real Estate Agent to receive the \\$500 or the > 18mo benefit described below. \\*Disclose in the first conversation with the Buyer.](#)

### TAP preferred lender resident benefit - \$795.00

**TAP preferred lenders** are just like TAP preferred agents. We have relationships with both of you and want you to get the most business possible. As part of the relationship you agree to refer all TAP Buyer referrals to the TAP preferred lender.

- \$795 towards closing costs.
- Must use the preferred Lender to receive the \$795 benefit.
- There may be some instances where the lender is not able to offer the incentive.
  - Communicate with your preferred lender.
- If the buyer asks for another lender referral or has their own lender it is important that you follow your local rules and do what is appropriate.
- If they have their own lender it is always recommended they get a second set of eyes on it from our preferred national lender.
- [\\*Make sure they know they do not receive the benefit if they do not use our preferred lender.](#)

### TAP / Property > 18 month Resident Benefit - \$900.00

- Where applicable (not all communities) when the resident stays for longer than 18 months they receive an additional amount of up to \$900 towards closing costs. This amount is contributed by TAP or the multifamily community.
  - Varies per management company. Know your properties / communities benefits.

### **TAP Preferred Title Company benefit**

Title co. 's, in many instances are able to discount certain fees to the buyer. Our future goal is to negotiate a national discounted fee. If and when we do we will inform you.

Until we secure the appropriate company, use your preferred title company. Excessive title company fees will not be tolerated. Ask your title co for the best deal for TAP.

### **TAP Resident Benefit FAQ's**

#### **Who is the national preferred lender?**

Cross Country mortgage, Jon Hasebi team,  
Jon Hasebi, Originating Branch Manager, Cross Country Mortgage  
[hasebiteam@myccmortgage.com](mailto:hasebiteam@myccmortgage.com) 801.706.1110 C, 801. 747.1244 W  
10713 South Jordan Gateway, Suite 120 South Jordan, UT 84095  
Personal NMLS 302427 Branch NMLS 2048956 Company NML S3029

#### **Is there ever a time / loan when the \$795 incentive will not be available from the lender?**

- Every now and then. The buyer and agent will be informed immediately once the lender has reviewed the buyer's credentials and has determined the type of loan. It is your responsibility to communicate with the lender to know if there will be a diminished incentive.

#### **Can the buyer use the real estate agent but not the lender?**

- Yes, but we recommend they use both. This is why you share the benefits of using each other and TAP on the first call.
- If they do not use the lender they do not receive the lender benefit.
- Other Benefits: working with knowledgeable trusted sources, getting the deal accepted and closed, negotiating the best possible deal.

#### **Can the buyer use the lender and not the agent?**

Yes, but we recommend they use both.

- If they do not use the TAP preferred agent they do not receive the agent or TAP / Property benefit when they qualify >18 mo. (Financial benefit)
- Other Benefits: working with knowledgeable trusted sources, getting the deal accepted and closed, negotiating the best possible deal.

## **QUICK TIPS**

**Resident facing website. Review it so you know what the resident already may know.**

- Read the FAQs. [www.theadvantageprogram.com](http://www.theadvantageprogram.com)

## **REFERRAL FOLLOW UP PROTOCOL**

**DAY 1 - Call as soon as possible. - If no answer, leave voicemail AND send text (scripts page**

**DAY 2 - Call (at a different time) - If no answer, leave voicemail AND send text**

**DAY 3 - Call (at ANOTHER different time) - If no answer, leave voicemail AND send text**

**DAY 5 - Call - If no answer, leave voicemail AND send text**

**DAY 7 - Call - If no answer, leave voicemail AND send text**

\*Full Scripts and additional information available on Pages 9-11 in the training manual

### **Notes:**

- You must record a note in the client profile when a communication is attempted. If it is not in writing it did not happen. Be clear and concise with your notes.

### **Lender Task:**

- When assigning a task to the lender be clear and concise with the subject then cut and paste your clear and concise note into the description. Due date is the date the lender is to follow up.
- When updating a task, if you change the due date, it will automatically send a notification to the other party. Whenever it makes sense, update the task rather than create an additional task. Don't force updating when it is better to create and assign a new task.

### **Completing a task**

Open the task, click edit, click complete. This will remove the task from your dashboard

## QUICK TIPS

### Turning Referrals into Opportunities / Deals. (Deals are opportunities.)

#### When does a referral become a Deal ( Opportunity) / When is a deal created?

- You create deals anytime after communicating with the resident if they show any interest in purchasing anytime in the future.

#### Creating a Deal

- When creating a deal, always assign the lender a task when the deal is created. The lender may need to reach out immediately or sometime in the future. Be sure to add a good note so they know what to do. The due date is the date the lender is to contact the referral.
  - After saving the deal you will be able to create an additional task for yourself.

#### Closing out a deal

- Open the deal, mark closed won or lost, fill in the appropriate information. Save

#### Removing referrals from your portal that are not going to buy

- To remove the referral from your portal, create a deal, mark the task complete while creating the deal (you have to create a task when creating a deal), save
- Reopen the deal, mark it “closed lost”.

### Marketing / Workflows

We market to our Referrals throughout the process. In order to insure they are not overmarketed to and keeping within the spirit of our agreements with the management companies please DO NOT send any marketing to referrals until after your deal closes and they become your future customer.

### Closing / Referral Fees / Payment of Referral fees

- A referral fee is paid to TAP on all referred clients.
- TAP referral fees are the stated % on your agent agreement of the net commission
- Referral fees are due and payable **to TAP** from the title co or closing entity upon settlement.
- TAP will distribute to the Property brokerage when applicable
- **TAP Brokerage Information** The Advantage Program, LLC Utah License # 11849288  
**Electronic transfer funds to:** Zions National Bank, The Advantage Program, LLC  
Operating Account # 982939589 Routing #: 124000054

## Resident Referral Follow Up Protocol

The following is the minimum follow up requirement when you are notified of a prospect becoming a referral:

### **DAY 1 - Call as soon as possible. - If no answer, leave voicemail AND send text (scripts page**

- See scripts next page

### **DAY 2 - Call (at a different time) - If no answer, leave voicemail AND send text**

- “Hi, RESIDENT FIRST NAME. This is YOUR FIRST AND LAST NAME, your Preferred Agent for COMMUNITY NAME and The Advantage Program, again. I want to make sure we’re able to connect so we can get you set up to take advantage of the benefits that are waiting for you when you purchase a home. I’ll try giving you a call again tomorrow to see if we can connect and get you taken care of.”

### **DAY 3 - Call (at ANOTHER different time) - If no answer, leave voicemail AND send text**

- See scripts next page

### **DAY 5 - Call - If no answer, leave voicemail AND send text**

- See scripts next page

### **DAY 7 - Call - If no answer, leave voicemail AND send text**

- “Hi, RESIDENT FIRST NAME. This is YOUR FIRST AND LAST NAME, your Preferred Agent for COMMUNITY NAME and The Advantage Program, again. I don’t want to bug you. Feel free to shoot me a call, text, or email if and when you’d like me to get you more information on your TAP Benefits. For now, I’ll check back in with you every few weeks to see if there’s anything I can do for you.”
- Always reinforce the advantage program and the PMC’s preferred lender on the first contact.
  - Lender may have already called the lead and will also introduce you, the partnership and the TAP benefits program
- Log your notes into the portal whenever possible. Be clear and concise labeling your subject and your notes
  - Put in enough notes that anyone can understand but not so much to be a novel. Be clear and concise for the subject and the note
- Place the lead in the appropriate stage when the stage changes.
- Our national preferred lender is the lender of choice and should be the only one you recommend unless the resident requests other lenders.
- You must continue to nurture the relationship until the lead is closed or no longer viable.

### **Scripts**

## BE PREPARED

- SIT STILL! Focus and take notes.
- SPEAK SOFTLY! Be energetic but don't overwhelm them.
- SLOW DOWN! Don't go too fast. This is new to them, and they may not take in everything if you go too quickly.
- PAUSE! Frequently ask if everything you've told them is making sense to them. Give them opportunities to have you clarify.
- LISTEN! Actually respond to what they say. Don't just move onto the next thing you wanted to say.
- DON'T INTERRUPT THEM! Wait until they're done talking to respond.
- MAKE THEM LAUGH! Every smile or chuckle builds trust and makes them more comfortable with you.

## RESIDENT LEAD CALL

- "Hi, RESIDENT FIRST NAME! My name is YOUR FIRST & LAST NAME from Keller Williams. I'm the Preferred Realtor for COMMUNITY NAME and The Advantage Program. I received your request for info on how we can help you buy a home and get you some credit toward your home purchase in the process. What questions do you have for me?"

- "First, let me explain how The Advantage Program works and how you get your Resident Benefit. It's most important that you know that the benefit only comes to you by using The Advantage Program's Preferred Agent, ME, and their Preferred Lender. Luckily for you, we're very good at what we do and we're excited to help you buy a home."

- If they ask if they have to use you or our lender: "To get the full benefit, you do need to use TAP's Preferred Agent and Lender. You CAN choose to use your own Realtor and/or Lender. You would just be giving up part of that benefit toward your Closing Costs."

\*Reminder, if they don't use the TAP Preferred Agent, they give up \$500. If they lived in the community for 18+ months, and would have qualified for the extra \$900, they also give that up if they don't use the TAP Preferred Agent. If they don't use TAP Preferred Lender, they give up \$795.

- **AVOID GETTING TOO INTO FINANCIAL CONVERSATION!!** If they start to ask about what their budget will be, what their mortgage payment will be, what rate they'll get, etc, respond with: "Those are great questions. You should be getting a call, if you haven't already, from our lender to make sure we're looking at the right homes at the right prices, and most importantly, on the right timeline for you. For now, what are we looking for in a new home?"

- "Tell me about your current situation. When is your lease up? Do you live by yourself? When we find that perfect home, will it be just you on the purchase or are we planning to include someone else?"

**LEAVING A VOICEMAIL:** “Hi, RESIDENT FIRST NAME! My name is YOUR FIRST & LAST NAME from Keller Williams. I’m the Preferred Realtor for COMMUNITY NAME and The Advantage Program. I received your request for info on how we can help you buy a home and get you some credit toward your home purchase in the process. Feel free to give me a call back at YOUR PHONE #. I’ll also send you a text with my contact info. You’re probably pretty busy, so I’ll plan to reach out again tomorrow if I don’t hear back from you by then. Thanks and I look forward to helping you out!”

**SENDING A TEXT/EMAIL** “Hi, RESIDENT FIRST NAME! My name is YOUR FIRST & LAST NAME from Keller Williams. I’m the Preferred Realtor for COMMUNITY NAME and The Advantage Program. I just left you a voicemail, but wanted to make sure you have my contact info. I received your request for info on how we can help you buy a home and get you some credit toward your home purchase in the process. When is a good time for me to give you a call so I can walk you through how the program works and we can talk about what I can do to help you?”

- Follow this text with your contact information, including your email, like below:

Cody Fehlberg  
REALTOR  
Keller Williams South Valley  
TAP Preferred Agent  
(801)669-2905  
codyfehlberg@kw.com

### **FOLLOW-UP SCHEDULE**

- DAY 1 - Call - If no answer, leave voicemail AND send text
- DAY 2 - Call (at a different time) - If no answer, leave voicemail AND send text

- “Hi, RESIDENT FIRST NAME. This is YOUR FIRST AND LAST NAME, your Preferred Agent for COMMUNITY NAME and The Advantage Program, again. I want to make sure we’re able to connect so we can get you set up to take advantage of the benefits that are waiting for you when you purchase a home. I’ll try giving you a call again tomorrow to see if we can connect and get you taken care of.”

- DAY 3 - Call (at ANOTHER different time) - If no answer, leave voicemail AND send text
- DAY 5 - Call - If no answer, leave voicemail AND send text
- DAY 7 - Call - If no answer, leave voicemail AND send text

“Hi, RESIDENT FIRST NAME. This is YOUR FIRST AND LAST NAME, your Preferred Agent for COMMUNITY NAME and The Advantage Program, again. I don’t want to bug you. Feel free to shoot me a call, text, or email if and when you’d like me to get you more information on your TAP Benefits. For now, I’ll check back in with you every few weeks to see if there’s anything I can do for you.”

## Notifications

### Two Types of Notifications

#### Buyer Referrals (95%)

- From TAP you will receive an email notification from residents who are interested in purchasing today or in the future. When you are notified of a referral through the portal it is your responsibility to reach out as quickly as possible, introduce yourself and our preferred lender partner, share your roles, their incentives and determine exactly when the next time is that you should inject yourself into the process.

#### Customer service requests (5%)

- Sometimes a resident will reply to a marketing communication with a customer service request. In this instance you should make a note in their file and send a notification through the system to the property or call the property. The property contact information is located in the resident profile dropdown at the top of the resident profile page. (click the > to open)

### Agent / Buyer Referral Email notification

When a resident responds to one of our marketing opportunities the email subject line may look something like this: **New Buyer Referral Alert! (Resident)**.

### Lender New Buyer Notification

- The new buyer lead becomes active and is visible on the lender's dashboard but the lender does not receive an email notification until you assign a task to them.
- It is up to the RE Agent to contact the buyer lead. Once you make contact, update the lender as to the buyer's follow up needs. You do this by assigning a task.
- When do you assign a task to the lender?
  - Anytime the Lender needs to know about a potential buyer whether their follow up is today or in the future.
  - Generally when a deal is created the first task is sent to the lender.
  - After creating the deal you can assign yourself a task
- It is the lender's responsibility to qualify the resident, turn them back over to you once qualified, or send them to credit repair.
- Once they turn them over to you it is up to you to move them through TAP stages, communicating with TAP preferred lender, just as you would any other lender.

## TASKS

### Notification Task Auto Created

- For New buyer / referral notifications a task will be automatically created in your portal. It will appear on your home page. You can also access it from the tasks button. Mark the task complete when completed

### Create a Task

- You create tasks from the client profile page, tasks section or when creating a deal

### Mark a Task Complete. (There are several ways to locate your task.)

Dashboard: Locate the task by clicking on any task number the dashboard or the tasks button

Home   Prospects/Leads   **Tasks**   Deals   POTW

| Adriana Agent : RE Agent                     |             |          |                  |
|--|-------------|----------|------------------|
| Total Prospects: Tenants (18) Investors (45) |             |          |                  |
| Tasks (Active Leads)                         |             |          |                  |
|  | Next 7 Days | Past Due | 7+ Days Past Due |
| <b>Buyers</b>                                | 1           | 58       | 55               |
| <b>Sellers</b>                               | 0           | 6        | 6                |

Tasks Button Page: Open the task by clicking on the task subject name.

| Due Date   | Lead Name     | Subject | Lead Type    | Assigned To   | Status |
|------------|---------------|---------|--------------|---------------|--------|
| 10/25/2021 | Susan Darling | test    | Active Buyer | Adriana Agent | Open   |

Renter Profile Page: Open the task by clicking on the task subject name

| Activities (Task)       |            |             |          |        |                         |      |
|-------------------------|------------|-------------|----------|--------|-------------------------|------|
| Subject                 | Due Date   | Assign To   | Priority | Status | Description             | Type |
| Note for Opp            | 10/22/2021 | Test Mark 2 | Normal   | Open   | Do this thing           | Task |
| dashboard test          | 10/22/2021 | Test Mark 2 | Normal   | Open   | dashboard test          | Task |
| testing deal appearance | 10/21/2021 | Test Mark 2 | Normal   | Open   | testing deal appearance | Task |

## Click Edit

| Activity Details |               |          |               |
|------------------|---------------|----------|---------------|
| Subject          | test          | Due Date | 10/25/2021    |
| Description      | test          |          |               |
| Status           | Open          | Priority | Normal        |
| Assign To        | Adriana Agent | Type     | Task          |
| Assigned By      |               | Prospect | Susan Darling |

[Edit](#)

To complete the task, click the arrow next to “open” and click completed, Click save

| Activity Details |                                     |          |   |
|------------------|-------------------------------------|----------|---|
| Subject          | <input type="text" value="test"/>   | Due Date | <input type="text" value="10/25/2021"/> |
| Description      | <input type="text" value="test"/>   |          |   |
| Status           | <input type="text" value="Open"/> ▼ | Priority | <input type="text" value="Normal"/> ▼   |
| Assign To        | Adriana Agent                       | Type     | Task                                    |
| Assigned By      |                                     | Prospect | Susan Darling                           |

[Save](#) [Cancel](#)

## Assigning a referral to another agent

When you find there is a need for another agent in your market to handle a referral you received you will need to transfer the referral to them. \* Be sure to communicate with them prior to sending them the lead.

- Open the referred client’s profile page
- Click the arrow above the name
- In the dropdown click edit
- In the RE Agent box click the arrow
- Assign to another arrow in the drop down
- Click Save

## Marketing opt out

If a referral asks to be opted out of communications, some or all they have two options. They can do it from any communication or if you are talking with them you follow the assignment steps and instead of assigning a new agent check the opt out boxes and save.

## TAP Portal

### Accessing the Portal

- You should have already received an email requesting that you sign up. If not reach out to [support@theadvantageprogram.com](mailto:support@theadvantageprogram.com)
- Once signed up go to [www.theadvantageprogram.com](http://www.theadvantageprogram.com)
- Click on agent portal in the footer

## Take the next step towards home ownership

Sign up today to speak with one of our dedicated real estate professionals.

Sign Up

The Advantage Program. Copyright 2021 | [Agent Portal](#)

## TAP Dashboard

The TAP portal dashboard is designed to give you a snapshot of your referrals and track your deals. It is also a lead management system that allows you to add notes, tasks and send notifications to lenders and leasing staff.

[Home](#) [Prospects / Leads](#) [Tasks](#) [Deals](#) [Manual](#)

| Test Mark 2 : RE Agent                     |              |          |                  |
|--|--------------|----------|------------------|
| Total Prospects: Tenants (1) Investors (0) |              |          |                  |
| Tasks (Active Leads)                       |              |          |                  |
|  | Next 7 Days  | Past Due | 7+ Days Past Due |
| <b>Buyers</b>                              | 0            | 0        | 0                |
| <b>Sellers</b>                             | 0            | 0        | 0                |
| Calls                                      |              |          |                  |
|  | Next 7 Days  | Past Due | 7+ Days Past Due |
| <b>Investor Calls</b>                      | 0            | 0        | 0                |
| <b>Tenant Calls</b>                        | 0            | 0        | 0                |
| Under Contract                             |              |          | \$ 0.00          |
|  | Next 30 Days | 30+ Days | All Active       |
| <b>Buyers</b>                              | 0            | 0        | 0                |
| <b>Sellers</b>                             | 0            | 0        | 0                |
| YTD Closed Volume                          |              |          | \$ 500,000       |
|  | Count        |          | Volume           |
| <b>Buyers</b>                              | 1            |          | \$ 500,000       |
| <b>Sellers</b>                             | 0            |          | \$ 0.00          |

### Navigation Buttons

- Top left corner on every page; [Home](#) [Prospects / Leads](#) [Tasks](#) [Deals](#) [FAQ](#)
- Quickly access each category by clicking on the button.

### Buyer Tasks: (top left, blue header)

- The 3 buyer columns will track your next 7 days, past due and 7+ days past due. If they get to past due handle them immediately
- Click on any number and it will take you to the task page clients under that column header. To see all open tasks click the task button. You can sort tasks multiple ways.
- Disregard seller column

### Under Contract (top right, green header)

- **The 3 UC columns are deals closing in the next 30, 30+ and all active UC**
- Click on any number and it will take you to the client for that deal to update it
- Disregard seller column

### YTD Closed (bottom right, green header)

- Total closed deals and total purchase price volume
- Click on any number and it will take you to the client for that deal to update it
- Disregard seller column

### Buyer Calls : (bottom left, blue header)

- Disregard all

## How to locate a referral by name

Most often a link will be in the referral email that you receive. If not:

- **Search** for their name in the search box in the top right corner or

Home Prospects/Leads Tasks Deals POTW Search...

**Test Mark 2 : RE Agent**  
Total Prospects: Tenants (1) Investors (0)

| Tasks (Active Leads) |             |          |                  |
|----------------------|-------------|----------|------------------|
|                      | Next 7 Days | Past Due | 7+ Days Past Due |
| Buyers               | 0           | 0        | 0                |
| Sellers              | 0           | 0        | 0                |

| Under Contract |              |          | \$ 0.00    |
|----------------|--------------|----------|------------|
|                | Next 30 Days | 30+ Days | All Active |
| Buyers         | 0            | 0        | 0          |
| Sellers        | 0            | 0        | 0          |

| Calls          |             |          |                  |
|----------------|-------------|----------|------------------|
|                | Next 7 Days | Past Due | 7+ Days Past Due |
| Investor Calls | 0           | 0        | 0                |
| Tenant Calls   | 0           | 0        | 0                |

| YTD Closed Volume |       | \$ 500,000 |
|-------------------|-------|------------|
|                   | Count | Volume     |
| Buyers            | 1     | \$ 500,000 |
| Sellers           | 0     | \$ 0.00    |

If their name does not appear the first time, search again. If it does not appear a second time, click on **prospect / leads** in the top left corner

Home **Prospects/Leads** Tasks Deals POTW Search...

**Test Mark 2 : RE Agent**  
Total Prospects: Tenants (1) Investors (0)

| Tasks (Active Leads) |             |          |                  |
|----------------------|-------------|----------|------------------|
|                      | Next 7 Days | Past Due | 7+ Days Past Due |
| Buyers               | 0           | 0        | 0                |
| Sellers              | 0           | 0        | 0                |

| Under Contract |              |          | \$ 0.00    |
|----------------|--------------|----------|------------|
|                | Next 30 Days | 30+ Days | All Active |
| Buyers         | 0            | 0        | 0          |
| Sellers        | 0            | 0        | 0          |

| Calls          |             |          |                  |
|----------------|-------------|----------|------------------|
|                | Next 7 Days | Past Due | 7+ Days Past Due |
| Investor Calls | 0           | 0        | 0                |
| Tenant Calls   | 0           | 0        | 0                |

| YTD Closed Volume |       | \$ 500,000 |
|-------------------|-------|------------|
|                   | Count | Volume     |
| Buyers            | 1     | \$ 500,000 |
| Sellers           | 0     | \$ 0.00    |

There are multiple ways to search on this page. After exhausting all options, click **add prospect**.

**Prospects/Leads** Add Prospect

Record Type: **All** PMC: All Lead Type: All Lease Expiration (From): Lease Expiration (To):

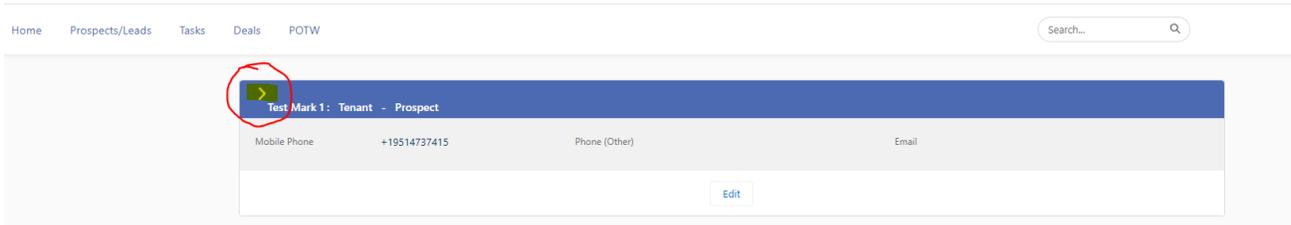
Show 10 entries Search:

| Lead Name   | Record Type | Lead Type | R.E. Agent  | PMC           | Lease Start | Lease Expiration | Rent Amount |
|-------------|-------------|-----------|-------------|---------------|-------------|------------------|-------------|
| Test Mark 1 | Tenant      | Inactive  | Test Mark 2 | Test Mark PMC | 5/01/2021   | 4/30/2022        |             |

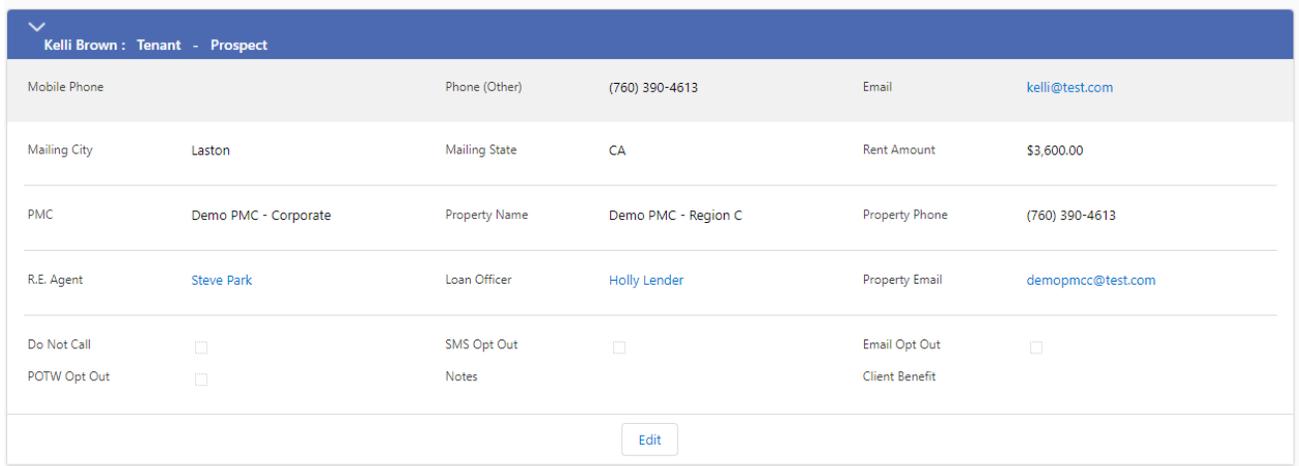
Showing 1 to 1 of 1 entries Previous 1 Next

## Referral Profile Page

Once you locate the referral profile page the following options are available in the first blue box. Click the arrow to expand to see the information and again to shrink.



Resident information, PMC and office information, lender information, agent information, Resident Benefits, opt in/out information ( you can manually change it here). Please note if you change the phone number add it into the notes. The system overrides phone numbers if / when the resident information gets updated.



## The second blue box on the page is for NOTES AND NOTIFICATIONS

The screenshot shows a CRM profile for 'Test Mark 1: Tenant - Prospect'. It includes contact details like Mobile Phone (+19514737415), Phone (Other), and Email. Below this is an 'Edit' button. A blue bar contains a 'Notes' button (circled in red), 'New Note', and 'New Notification' buttons. A table lists notes with columns for Subject, Created By, Created Date, and Description. The table contains two entries: 'Note for Opp' and 'Mark Test Note'. 'Previous' and 'Next' buttons are at the bottom right.

| Subject        | Created By  | Created Date       | Description               |
|----------------|-------------|--------------------|---------------------------|
| Note for Opp   | Test Mark 2 | 10/19/2021 9:19 AM | This is a note for an opp |
| Mark Test Note | Test Mark 2 | 10/19/2021 9:15 AM | Note Test 1               |

To add a note click New Note, Fill in subject and note, Click Save

The 'Add New Note' form has a 'Subject' text box and a 'Note' text area. 'Save' and 'Cancel' buttons are at the bottom.

Send a notification to whomever should receive it. Click Notification

- Fill in Subject, Message, and in the red circle click the dropdown and click on the receiver. Save. The person will automatically be notified

The 'Add Notification' form includes 'Subject', 'Message', and 'Assign To' fields. A dropdown arrow in the 'Assign To' field is circled in red. 'Save' and 'Cancel' buttons are at the bottom.

## The third box on the resident profile page is the **ACTIVITIES / TASKS** Box

### Profile page

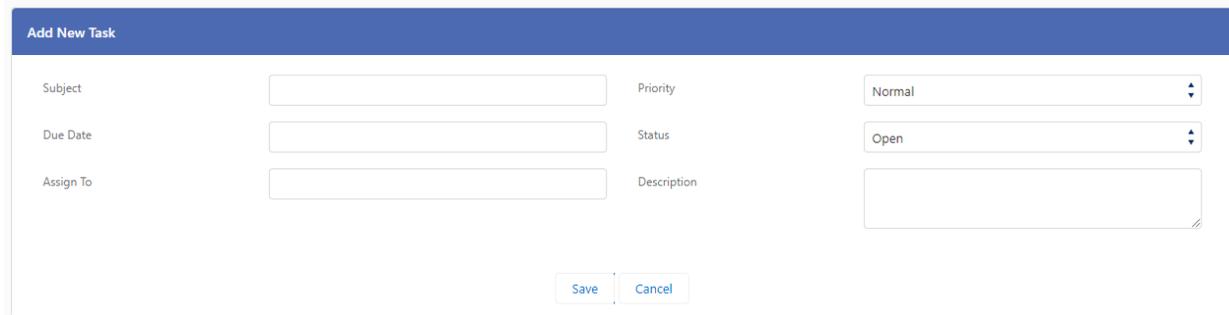


| Subject      | Due Date   | Assign To   | Priority | Status | Description   | Type |
|--------------|------------|-------------|----------|--------|---------------|------|
| Note for Opp | 10/21/2021 | Test Mark 2 | Normal   | Open   | Do this thing | Task |

- Search “All, Open or Completed” tasks in the center left box
- Search all tasks or notifications in the center right box
- Add a new task by clicking on the far right box.

### Add a Task:

- Fill in all of the boxes, assign it to the appropriate person and click save. They will receive a notification. **Do not assign tasks to the property.**



Add New Task

Subject:

Due Date:

Assign To:

Priority: Normal

Status: Open

Description:

Save Cancel

## The fourth box and the only green “Money” box is for DEALS

| Deal Name | Stage | Close Date | PMC | Property | Loan Officer | R.E. Agent |
|-----------|-------|------------|-----|----------|--------------|------------|
|-----------|-------|------------|-----|----------|--------------|------------|

You can search for any type of deal in the center box. Click on it to expand your choices

### New Deals

- Once it is determined the resident is a potential buyer or seller a Deal is created.
- What determines if they are a potential future buyer.
  - If they give any indication that they may buy now or anytime in the future create a deal
- You and only you, the RE agent creates or closes the deal / opportunity.
- To create a deal, Click New, the box on the right
- Fill in the blanks, click save

**Add New Deal**

Stage: Active Buyer

**Add Task**

Subject: | Priority: Normal

Due Date: | Status: Open

Assign To: | Description: |

**Add Note**

Subject: | Note: |

Save Cancel

## After the deal is created it looks like this

| Deals                  |              |            |               |          |              |             |
|------------------------|--------------|------------|---------------|----------|--------------|-------------|
| Deal Name              | Stage        | Close Date | PMC           | Property | Loan Officer | R.E. Agent  |
| Test Mark 1 10-20-2021 | Active Buyer | 4/18/2022  | Test Mark PMC |          |              | Test Mark 2 |

- **Search for any type of deal** in the center box. It defaults “all active”.
- **The Deal Name** is Referral name and the date it was created, far left.
- **The stage** is Active Buyer or Active Seller. Almost all of your deals are active buyer.
  - The stages are: active buyer, under contract, closed won and closed lost. Editable when creating the deal.
- **Close Date:** Is automatically set 6 months out. Edit and enter your best guesstimate.
  - This will change as your deal progresses. It is important that you edit this.
- **The PMC** will be automatically entered
- **Client Benefit:** Enter the amount the RE brokerage amount + any additional amount TAP or the property may offer. DO NOT include the lender benefit here.
- **Loan officer** will be automatically added
- **RE Agent** is who created the deal. It can be reassigned.
- **To edit, click on the deal name. The following screen appears.**

**Deal**

|              |                     |              |                           |
|--------------|---------------------|--------------|---------------------------|
| Lead Name    | Audra Investar      | Deal Name    | Audra Investar 10-06-2021 |
| Property     | Demo PMC - Region A | R.E. Agent   | Adriana Agent             |
| Loan Officer | John Lender         | Stage        | Active Buyer              |
| Type         | Purchase            | Listing Date |                           |

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|                         |             |                        |                          |
|-------------------------|-------------|------------------------|--------------------------|
| Application Taken       |             | Pre-Approved Amount    |                          |
| Close Date ?            | 4/4/2022    | Purchase Price         | 400000.00                |
| Gross Commission % ?    | 3.00        | Gross Commission ?     | \$12,000.00              |
| Client Benefit Amount ? | 500.00      |                        |                          |
| Net Commission          | \$11,500.00 | R.E. Brokerage Comm. % | 10.00%                   |
| R.E. Brokerage Comm.    | \$1,150.00  | PMC Referral Fee %     | 80.00%                   |
| PMC Referral Fee        | \$9,200.00  | TAP Referral Fee %     | 10.00%                   |
| TAP Referral Fee        | \$1,150.00  | Office Spiff ?         | <input type="checkbox"/> |
| Office Spiff Amount ?   |             |                        |                          |

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Loss Reason: --None--

Click on the Edit button and the following screen appears. Editable fields are marked in yellow and explained below it. Be sure to click save after entering information

## Editable Fields

**Deal Name (Top right):** The current field is the resident name + date it was created.

**Property (Black Circle):** (Under Deal Name): When you close the deal you are required to enter the property address. **To add the property you must save it before changing any other fields on this page.** If you attempt to change them together information will be lost and you will have to reenter the information.

**R.E. Agent:** To assign this deal to another agent click the box, name, save.

**Stage: (First highlighted box on left):** Active Buyer is the default. Changes the stages as the buyer status changes. Under contract, closed won, closed lost....(see below for more stage details)

**Type:** Purchase is the default. If you happen to get a seller click Sell.

## **Editable Fields (cont.)**

**Close Date:** Enter the close date to the best guesstimate and as you get closer change it.

**Purchase Price:** When you go under contract enter it here, Adjust if it changes when closed.

**Gross commission:** Defaults to 3%. Change it if necessary and it automatically calculates.

**Client Benefit check box:** Check the box and the real estate brokerage amount towards closing cost will appear to the right.

**Client benefit amount:** If the amount needs to be adjusted override it here. Do Not change it for TAP / Property referral additional amount if the resident stays longer than 18 months.

**Office spiff.** Disregard

**Office spiff amount** Disregard

**CLICK SAVE!**

**All other boxes will auto fill and are editable by TAP customer support.**

- [support@theadvantageprogram.com](mailto:support@theadvantageprogram.com)

## Closing / Referral Fees / Payment of Referral fees

### TAP / Property Referral Fees

- A referral fee is paid to TAP on all referred clients.
- TAP referral fees are the stated % on your agent agreement of the net commission
- Referral fees are due and payable **to TAP** from the title co or closing entity upon settlement.
- TAP will distribute to the Property brokerage when applicable

#### TAP Brokerage Information

The Advantage Program, LLC  
Utah License # 11849288

#### Electronic transfer funds to

Zions National Bank  
The Advantage Program, LLC  
Operating Account # 982939589  
Routing #: 124000054

**K-DUB HUB referral fees** are paid internally from KW brokerage to KW brokerage

### Property Communications / Visitation

- The leasing staff is one of the first points of contact with residents. Part of our job is to keep any burden from them but if you have a relationship with them it has a tendency to generate more referrals.
- After we launch with a property please stop in and introduce yourself. Do not spend much time with them just enough to get to know them. They are generally overloaded but they do like snacks and lunches.
- Sometimes the communities will allow you to sponsor an event if it is beneficial to them. If you have an interest, contact us to see what can be arranged.
- DO NOT ASSUME that every community will allow sponsorship.
- **NEVER** VISIT A PROPERTY THE FIRST WEEK OR LAST 3 DAYS OF THE MONTH!
- DO NOT market to the property's tenants. TAP marketing covers all marketing to the referrals and stays within the spirit of our management agreements. After they close and become your future customer you are welcome to put them in your marketing stream

**Your K-DUB HUB contacts** are located in the mountain time zone:

Emily Lowry: [emilylowry@kw.com](mailto:emilylowry@kw.com), 801-828-8699  
Cody Fehlberg: [codyfehlberg@kw.com](mailto:codyfehlberg@kw.com) 801-669-2905

**Preferred National Lender:** Cross Country Mortgage, Jon Hasebi Team, 801.747.1244

**Property management, lender and real estate agent** Contact information is located on each resident profile page.