

## OPPORTUNITY TIME POLICY HANDLING CUSTOMER INQUIRIES

1. The up-agent is entitled to and responsible for service to all new customer inquiries that come in while they are on duty.
2. Whenever a customer calls our office about a property listed by an agent in our office and/or asks for an agent by name, that call **must be forwarded to that agent's extension immediately. Our policy is "your listing, your lead."**
3. Whenever a customer personally visits the office and asks for an agent by name or about a listing listed by an agent associated with the office, that customer must be referred to that agent. It should never be the intent of one agent to pull a buyer/seller away from another agent.
4. If a caller or visitor asks for an agent who is not in and does not want their voice mail or cell phone number and will **"speak with anyone"**, it is the responsibility of the responding agent to answer questions and work to meet their needs after a sincere effort has been made to put them in contact with the listing agent. The up-agent is then to notify the listing agent and offer the listing agent that person with **no expectation of compensation**. And the up-agent must determine if that buyer is under a buyer agency contract with an existing agent. If that buyer is under contract the agent must not interfere with that relationship.
5. Up-agent must be in the office to take their time and check in at the front desk at the start of their time.
6. **To qualify for Opportunity Time, the agent must have an active license, have joined local Realtor Board and be a member of PRIME MLS. The agent must also complete the following courses and meet with someone on the leadership team to review front desk procedures.**
  - **Buyer Documents**
  - **Listing Documents**
  - **Buyer Consultation**
  - **Listing Presentation**
  - **Purchase & Sales Agreement**

All these courses are scheduled on a regular basis and can be taken while the agent waits for their license to become active. Review the monthly training calendar for dates and times. Recordings of the courses can be found on our training portal.

7. If an agent is unable to make a shift they signed up for they are responsible for informing the front desk and for finding a replacement.

**REMEMBER:**

- Answering the telephone in a professional manner is required of all uptime agents.
- “Thank you for calling Keller Williams Realty Metropolitan”, this is \_\_\_\_\_ how may I help you” or “It’s a great day at Keller Williams, this is \_\_\_\_\_how may I help you.”
- Our responsibility is to provide exceptional service to sellers and buyers.
- Dress professionally to work the up desk.
- Eat before or after your up-time.

*If these policies and procedures are not adhered to, Leadership can discontinue uptime privileges, for any associate, at any given time.*