







Cartus A Team Agent Marketing Training – Level 1

Cartus Network Marketing Referrals

OBJECTIVES



- Identify the Cartus performance metrics for the Marketing Referral
- Identify the average home sale cost to a Client when a property is sold during the Customer's marketing period vs The Client's inventory period
- Recognize the different home sale types available for a Corporate Relocation
- Describe the Amended Sale process and financial impact to the Customer, Client and your Broker when that process is not followed
- Navigate the Corporate Relocation home sale process including required paperwork for homes sold in the home marketing phase

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Performance Metrics

- BMA Variance 4% or less
- BMA Timeliness
- Days on Market (DOM)
- Amended Sale Rate
- Relocation Service
- Initial Contact Attempt
- Pending Sale
- Final Sale

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SURVEY	WHAT'S ASKED	WHEN SURVEY IS SENT
Cartus Interim Survey	"Pulse check" to gauge how we are doing thus far for the move still in process.	Approximately one month after the start of the process depending upon the complexity of the move.
Follow Up Survey	Feedback on all services completed to date.	Up to three months after the Interim Survey is sent depending upon the complexity of the move.
Final Survey (if needed)	Sent if there are additional services that have been completed since the Follow Up Survey was sent.	Up to two months after the Follow Up Survey is sent, if needed.

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Home Sale Agent

Please rate your overall experience with AGENT:

Excellent	Good	Fair	Poor
5	4	3	2

Would you recommend your agent to a colleague?

Yes No

Please provide your comments regarding your overall experience with AGENT:

Home Sale Agent Drill Down Questions:

Home Sale Agent

Please tell us more about your experience with AGENT:

Excellent	Good	Fair	Poor
5	4	3	2

Communicated with you in a timely manner

Demonstrated knowledge of the local market

Implemented your strategy as discussed

Home Purchase Agent

Please rate your overall experience with AGENT:

Excellent	Good	Fair	Poor
5	4	3	2

Would you recommend your agent to a colleague?

Yes No

Please provide your comments regarding your overall experience with AGENT:

Home Purchase Agent Drill Down Questions:

Home Purchase Agent

Please tell us more about your experience with AGENT:

Excellent	Good	Fair	Poor
5	4	3	2

Communicated with you in a timely manner

Demonstrated knowledge of the local market

Followed up on commitments

Provided information on properties and neighborhoods that met your requirements

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Program Types

- Buyer's Value Option
- Amended Sale
- Direct Reimbursement
- Closing Services Only



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Program Types

Buyer Value Option-BVO

- oNo Guaranteed Buyout Offer
- oCustomer markets property and verbally negotiates sale terms
- oCartus signs contract with the outside buyer

Amended Sale

- oGuaranteed Buyout Offer is offered
- oCustomer markets property and verbally negotiates sale terms
- oCartus signs contract with the outside buyer
- oCartus "amends" their Guaranteed Buyout offer to the outside sale price

Direct Reimbursement-DR

- oNo Guaranteed Buyout Offer
- oCustomer markets property and negotiates sale terms
- oCustomer signs contract and attends closing
- oCustomer submits for reimbursement of closing costs

Closing Services Only- CSO

- oNo Guaranteed Buyout Offer
- oCustomer markets property and negotiates sale terms
- oCustomer signs contract with the outside buyer
- oCartus facilitates closing

Regular

- oCustomer accepts Guaranteed Buyout Offer
- oHome goes into inventory

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The Internal Revenue Service says so...



INTERNAL REVENUE SERVICE

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IRS Revenue Ruling 72-339

The IRS agrees that bona fide, Fair Market Value residence transfers from Employee to Employer are valid sales even if the Employer immediately sells the property to an outside Buyer. Thus, even though the Employee is able to dispose of his or her property through this means without incurring a Real Estate Sales Commission or closing costs, the Employee does not have compensation income and does not have to pay any taxes for this benefit.



Transaction 1

Customer = Seller Cartus = Buyer

No closing cost incurred or paid
No taxable income to the Customer

Transaction 2

Cartus = Seller 3rd Party = Buyer

Closing cost incurred and paid
A Business Expense to the Employer

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Broker Liability – Tax Gross Up Consequences

Amended Sale Transaction	Taxable Sale Transaction
\$400,000 (Sales price)	\$400,000 (Sales price)
X 8% (Closing costs)	X 8% (Closing costs)
\$32,000	\$32,000 (Taxable income)
Total paid on behalf of the Customer, but not taxable income. This is considered a business expense for the Corporate Client	X 60% (Tax reimbursement)
	\$19,200
	Broker pays to cover tax burden



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Home Marketing Process

- Welcome Center contacts customer, introduces and promotes the many benefits of utilizing the Cartus Broker Network!
- Welcome Center places the departure and destination referrals for the customer with Broker
- BMA instructions are electronically sent to the Relocation Department within 24 hours of referral placement (excludes weekends)

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Home Marketing Process

- The Relocation Department assigns a trained and certified A-Team agent, sends referral information and instructions to agent
- Agent contacts customer within 24 hours from receipt of referral to schedule listing appointment

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Home Marketing Process

- Complete BMA within 2 days of appointment date
- Relocation Department reviews BMA for accuracy, marketing plan, completeness and signs document
 - The BMA must include interior and exterior photos, and is submitted electronically to electronicbma@cartus.com

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Home Marketing Process

- The Cartus Client Services Consultant (CSC) is the main point of contact for the Customer and is responsible for delivering the relocation benefits package
- The customer is the decision maker until Cartus purchases the home from them
- The Customer verbally negotiates all offers and **DOES NOT** sign any paperwork related to the sale including -Cartus signs all contract related documents*

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BMA

The BMA is the analysis of the home through the agent's eyes and experience. The goal is to tell a complete "story" of the subject property and how it relates to the current housing market.


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Broker Market Analysis Tips

A Team Agents should never send a Broker Market Analysis directly to Cartus!

Follow Cartus Requirements!

- The BMA must be completed and submitted to your Relocation Department within 2 days of viewing the property. This gives your Relocation Department 1 day to review the report for thoroughness and accuracy, and then submit it to Cartus in order to meet the 3 day goal.
- It's extremely important that BMAs are done in a professional manner.
- The BMA must be typed, spell checked and completed in its entirety.
- Prior to submitting your report, please be sure all photos of the interior and exterior of the property have been included in the photomount document and all questions have been answered.
- All BMAs need to be submitted by your Relocation Department to a specific mailbox at Cartus. This mailbox has no size restrictions and your BMA will be time stamped upon receipt.
- Please DO NOT email the BMA to Cartus yourself. The photomount document creates too large a file size and your email will be blocked by Cartus servers. Cartus will not be aware you attempted to send the BMA and received date will be effected.
- Make sure you follow your internal process for BMA review and submission.



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Broker Market Analysis

Important guidelines: Cartus will accept your BMA.

This form is to be completed first

☐ Home Marketing ☐ Inventory

Client Marketing Time

☐ All Days ☐ 90 Days ☐ 180 Days ☐ Normal Marketing Time

File #:

Cartus Contact: _____ Cartus Office: _____ Phone #: _____

E-mail Address: _____ Fax #: _____

Cartus Address: _____

Homeowner:

Address: _____

City/State/Zip: _____

Prepared by (company name): _____ Relocation Director Name: _____

Agent Name: _____

Agent Office Address: _____

City/State/Zip: _____ Fax #: _____ E-mail: _____

Agent Phone #: _____

If Listed:

Current Listing Company/Agent's Address: _____

Typical Commission for the area: _____ % List to Sale Price Ratio for area: _____ %

Homeowner's Purchase Date: _____ Homeowner's Purchase Price: \$ _____

Be sure BMA is TYPED and all questions are answered including:

- Cartus file number
- Home Marketing or Inventory BMA
- Client Marketing Time
- Customer's purchase price and date
- Client Marketing Time is selected

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property and neighborhood data

Subject Property: ☐ Single Family ☐ Mobile/Manufactured ☐ Urban ☐ Sprinklers
☐ Townhouse ☐ Multi-family ☐ Rural ☐ Security System
☐ Condo ☐ Other ☐ Suburban ☐ Owned ☐ Leased

Does the subject property conform to the neighborhood? ☐ Y ☐ N If no, explain: _____

Are taxes typical for the area? ☐ Y ☐ N If no, explain: _____

Property Values: ☐ Increasing ☐ Stable ☐ Declining Type of Cooling: _____ Typical? ☐ Y ☐ N
Type of Heat: _____ Typical? ☐ Y ☐ N

Supply/Demand: ☐ Shortage ☐ In Balance ☐ Over Supply Association: ☐ Gated: ☐ Yes ☐ No Club House: ☐ Yes ☐ No
☐ Pool: ☐ Yes ☐ No Tennis: ☐ Yes ☐ No

Normal Market Time for Subj Property Area: _____
☐ 60 Days ☐ 90 Days ☐ Up to 120 Days
☐ Over 120 Days ☐ Other _____

Competition in Subject's Price Range: _____
Number of competing listings: _____
Low: \$ _____ High: \$ _____
Number of sales in the last 3 months in this price range: _____
Typical buyer/agent incentives/concessions: _____

New Construction in Direct Competition
Number of homes in price range: _____
Current Builder Incentives: _____
Current Agent Incentives: _____

Foreclosures/distressed homes in Direct Competition
Number of homes in price range: _____
Current Incentives: _____
Current Agent Incentives: _____

Focus on the following items:

- Confirm the type of property and if it is typical for the area
- Property values – supply and demand
- The normal marketing time in the area in this price range
- Competition in subjects price range: when selecting comps your spread should be realistic and relate to the direct competition
- Is there new construction competition? What is the impact? How close to subject property?

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property and neighborhood data

Subject Property: ☐ Single Family ☐ Mobile/Manufactured ☐ Urban ☐ Sprinklers
☐ Townhouse ☐ Multi-family ☐ Rural ☐ Security System
☐ Condo ☐ Other ☐ Suburban ☐ Owned ☐ Leased

Does the subject property conform to the neighborhood? ☐ Y ☐ N If no, explain: _____

Are taxes typical for the area? ☐ Y ☐ N If no, explain: _____

Property Values: ☐ Increasing ☐ Stable ☐ Declining Type of Cooling: _____ Typical? ☐ Y ☐ N
Type of Heat: _____ Typical? ☐ Y ☐ N

Supply/Demand: ☐ Shortage ☐ In Balance ☐ Over Supply Association: ☐ Gated: ☐ Yes ☐ No Club House: ☐ Yes ☐ No
☐ Pool: ☐ Yes ☐ No Tennis: ☐ Yes ☐ No

Normal Market Time for Subj Property Area: _____
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Competition in Subject's Price Range: _____
Number of competing listings: _____
Low: \$ _____ High: \$ _____
Number of sales in the last 3 months in this price range: _____
Typical buyer/agent incentives/concessions: _____

New Construction in Direct Competition
Number of homes in price range: _____
Current Builder Incentives: _____
Current Agent Incentives: _____

Foreclosures/distressed homes in Direct Competition
Number of homes in price range: _____
Current Incentives: _____
Current Agent Incentives: _____

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Local market indicators

Provide a prediction of the local real estate market for the next 90 days. Include information on economy, layoffs, major business closings, new employment opportunities, impact of new construction/foreclosure activity, etc.

Location

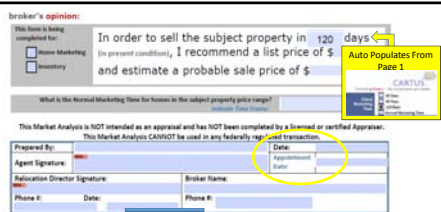
What is the marketing impact of the subject's location? (schools, shopping, highways, employment, etc.) Describe below:

Local Market Indicators: Share your predictions on what is going to happen in this marketplace over the next 90 days. Consider the local unemployment figures, seasonal changes, economic conditions, competition with new construction, price range, buyer pool and anticipated market trends, all of the soft components that are impactful to the marketplace.

Location: These are more geographical components as they relate to the subject property; the actual physical location of the subject property and proximity to local amenities, marketing hindrances or enhancements. Is there easy access to employment, shopping, schools, public transportation? Is the property in proximity to power lines, RR tracks, water/beachfront, flood plain, commercial buildings, rural area, corner lot, etc.?

The set of values based on client parameters

Brokers Opinion and Signature



- Only one Marketing Time is needed. It is based on the Client Marketing Time from page 1. Thus you will have only one value for suggested list price and one value for sale price.
 - To sell a home in 90 days typically a home needs to be priced aggressively
 - To sell a home in 120 days you have more time. Take into consideration time of year, school schedule, holidays, etc.
- Normal Marketing Time – identify the time it typically takes to sell a home in this area
- Value must reflect current market conditions
- Value submitted must be your value, not what the customer wants to list the home for. Position price *up front* with the customer!
- Please review and date the report before submission to ElectronicBMA@cartus.com

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Need help? Click or Press CTRL and click here

Photo Mount Tutorial

Subject Property Photo Mounts

Property Address:

Cartus File #: Date:

ROOM:

- ☐ Remove paper & paint
- ☐ Paint All
- ☐ Clean Carpet
- ☐ Replace Carpet
- ☐ Other

Comments:

[Click to Play Video](#)

Place Photo Here

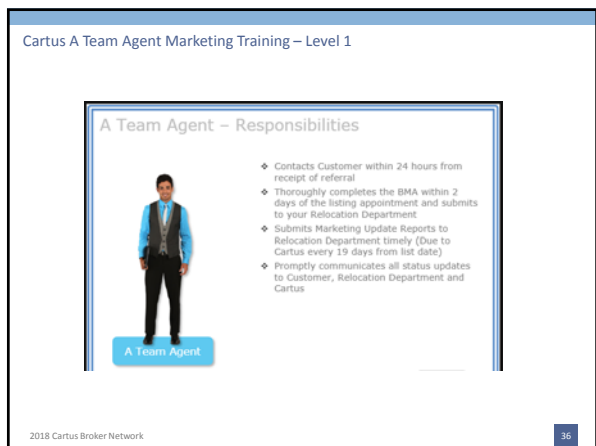
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Home Marketing Updates







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Cartus – Responsibilities



- ❖ Single point of coordination for the Customer during their relocation
- ❖ Educates the Customer on their relocation benefits and Employer's home sale process
- ❖ Partners with the Listing Agent to ensure the Customer is educated on their local market
- ❖ Is an advocate for the Agent and Relocation Department. Partners with you to get the strategies and recommendations implemented by the Customer with the goal of helping you get the property sold

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Listing the Property



- Execute the Listing Agreement
- Begin Marketing the Property
- Complete your Marketing Update Report
- Submit your Marketing Update Report

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Listing the Property – Required Paperwork

- The Agent Contract Tool
- Blank State Disclosure
- Completed State Disclosure
- Cartus Standard Addendum
- Cartus State Contract
- Customized Marketing Material
- Broker's Exclusion Clause
- Most Recent Cartus SRED
- Signed Listing Agreement
- MLS Listing with Split
- Signed Lead Paint Disclosure

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Protecting the Customer, Agent & Property

- Ask permission to include photos of children’s rooms in listing material
- During showings recommend the Homeowner secure:
 - ✓ RX drugs, jewelry, house & car keys, garage door openers, firearms, hunting gear, ammunition, financial documents/cards, electronic devices, high value items
- Pets should not be left unattended during showings

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Protecting the Customer, Agent & Property

- Request temporary password from security company for alarm
- “Hide a Keys” should be removed during marketing period
- Shred all financial & personal documents before disposing, do not leave unopened mail visible during showings
- Remind agents to secure home after showings

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MARKETING UPDATE REPORT



- It is key to have the most updated information for Cartus to be able to assist you in influencing the customer.
- The Client Services Consultant is required to deliver marketing information to the customer. To do so they rely on the agent for complete updated marketing information. They can't make a call to the customer until they have updated data, thus your submission every 19 days is critical to the process. **DO NOT WAIT FOR THE CSC TO REQUEST AN UPDATED REPORT – PRO-ACTIVELY FLAG YOUR CALENDAR!**
- Markets don't always change in a 19 day period. It is important you use your expertise to think outside the box and explore all marketing options.
- Communication is Key!

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Marketing Update Report Tips

A Team Agents should never send a Marketing Update directly to Cartus!

Follow Cartus Requirements!

- 01 The Marketing Update Report is due to Cartus:
 - ◆ Every 19 days for Marketing Properties
 - ◆ Every 14 days for Inventory Properties
- 02 It's extremely important that Marketing Update Reports are done in a professional manner.
- 03 It must be typed, spell checked and completed in it's entirety.
- 04 You will submit your Marketing Update Report to your Relocation Department via email.
- 05 Your Relocation Department will review the report and place a summary note in Broker Center and then forward the report to Cartus.
- 06 All Marketing Updates must be sent to Cartus in their electronic format. Not scanned, pdf, or hand written versions.
- 07 Cartus realizes not all markets change within a 14-19 day period. It's important you use your expertise and think outside of the box and explore all marketing options.



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CARTUS
Broker Network

Offer, Contract & Closing

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Offer Negotiations

- Your Customer verbally negotiates with the Buyer(s)
- Cartus will sign the contract with the Buyer(s)
- Cartus will buy the property from your Customer
- Cartus will take the property to closing with the Buyer(s)

Transaction 2




Cartus Seller 3rd Party Buyer

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Contract Specialist – Responsibilities



- ◆ Contact for the Listing Agent from receipt of an offer until offer signing
- ◆ Notifies Agent of outstanding items required before Cartus can sign the offer
- ◆ Reviews the contract and provide terms to the Consultant who reviews it with the Customer
- ◆ Signs the contract on behalf of Cartus
- ◆ Notifies Agents of outstanding documents not submitted with the contract and the assigned Cartus Closing Specialist
- ◆ Notifies Agents of outstanding documents not submitted with the contract and the assigned Cartus Closing Specialist

Contract Specialist

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Local Closing Team – Responsibilities



- ◆ Reports all information received from Buyer's Agent, Attorney or Escrow Agent to the Regional Closing Office (RCO) for approval/responder from Cartus
- ◆ Communication channel: LCT ↔ RCO ↔ Cartus
- ◆ Works with Agent to identify final figures and approved expenses for the Closing Disclosure
- ◆ Facilitates the local closings on behalf of Cartus

Local Closing Team

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Regional Closing Office – Responsibilities



- ◆ Legal representative for Cartus from title search to close of transaction
- ◆ Completes title search, prepares & forwards deed package to Customer
- ◆ Calculates the Customer's equity
- ◆ Coordinates the closing with Listing Agent, Cartus, and the (LCT) Local Closing Team (aka "escrow/attorney representative")
- ◆ Follows up on mortgage contingency
- ◆ Approves final Closing Disclosure, processes sale proceeds and records deed

Regional Closing Office

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Receipt of Offer

- Notify the CSC-Client Service Consultant that you are negotiating an offer
- Customer to verbally negotiate sale terms
- Agent to carefully READ and REVIEW the contract with the customer prior to submission to Cartus
- Only submit one contract (State or Cartus Contract)
- Submit fully negotiated contract to rescontractspecialist@cartus.com

Do not send Cartus the contract until fully negotiated

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Offer Negotiation Tips

Follow Cartus Requirements!

- 01 When you know an offer is coming, make sure the Buyer's Agent has the most recent SRED package and instructions.
- 02 All offers should be presented on a Cartus State Contract.
- 03 When a Cartus State Contract is not available in the area, the Cartus Standard Addendum must be included.
- 04 Once the written offer is received, carefully review the terms with your Customer for their verbal approval prior to submitting it to Cartus.
- 05 Please remember DO NOT let your Customer sign the offer, any counter offers or repair requests.
- 06 Only fully verbally negotiated, complete contract packages should be forwarded to your Relocation Director. Your Relocation Director will review for completeness and forward to Cartus.
- 07 A Contract Specialist will be assigned to work with you to get the offer signed.

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Offer Negotiation Tips

Educate the Buyer's Agent!

- 01 All offers are contingent upon the review and approval of Cartus.
- 02 Cartus will sign the offer on behalf of our Corporate Client.
- 03 Cartus is only available Monday through Friday to sign offers.
- 04 All offers should be written to close with the Cartus Regional Closing Office.
- 05 Cartus will not accept an offer contingent on the sale of the Buyer's property.
- 06 Cartus will accept an offer contingent on the closing of the Buyer's property, subject to the Cartus review of the Buyer's sale documentation.
- 07 Cartus does not allow early occupancy.

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Electronic Signature

Accepted on all listing and offer documents via:

- DocuSign
- Dotloop
- AuthenticSign
- Skyslope
- Zipogix Digitalink (aka Signix)
- eSignOnline
- CTMContracts

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Seller's Real Estate Disclosure (S.R.E.D.)

Affiliated Business Arrangement

Lead Paint Addendum

Non-occupant Disclosure

Cartus COS

Standard Addendum

Earnest Money

Proof of Funds

Mortgage Pre-Approval


Agent Contract Tool

Submit a complete contract package from the start!

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Agent Contract Tool and Contract Checklist - Required



- Outlines terms of the deal
- Facilitates Cartus review
- Facilitates Cartus review and approval with the Customer

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Offer Package -
Mortgage Pre-approval

Mortgage Company Name _____

Date here _____

To Whom It May Concern:

Please be advised that Mark and Lynn Kermitt have been pre-qualified for a conventional mortgage in an amount not to exceed \$389,000.00, to purchase the property located at 6 Rodeo Drive in the city of Beverly Hills, CA.

Please do not hesitate to contact me at (408) 555-8956 if you have any questions.

Sincerely,

Mortgage Broker Name _____

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Offer Package -
Proof of Funds

Bank Name _____

Date here _____

To Whom It May Concern:

Please be advised that Mark and Lynn Kermitt have several bank accounts with XYZ bank. They enough funds to purchase the house located at 6 Rodeo Drive in Beverly Hills, CA for \$389,000.00.


Please do not hesitate to contact me at (408) 555-8956 if you have any questions.

Sincerely,

Bank Associates Name _____
Title _____

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Offer Package -
Earnest Money Check



Copy of the Earnest Money Check - Earnest money requirements are as follows:

- Purchase price of \$0 up to \$300,000 = minimum of \$1,000
- Purchase price of \$300,001 up to \$500,000 = minimum of \$5,000
- Purchase price of \$500,001 up to \$750,000 = minimum of \$10,000
- Purchase price of \$750,001 and above = minimum of 5%

*If this is not reasonable and customary in your area, notify Cartus of standard practices when submitting the offer

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What's the Delay?

Top three contributors to a delayed contract signing

1. Missing Cartus State Contract or Cartus Standard Addendum when a Cartus State Contract is not available
2. Submission of an expired contract
3. Insufficient Lender Letter

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The Inspection Contingency

HOME INSPECTION REPORT
RESIDENTIAL REAL ESTATE PROPERTY CONDITION REPORT

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Contingency Removal

- Manage to Contingency Due Dates!!!
- Pro-Active Contingency Follow-Up
 - Cartus emails the Relocation Department and agent a contingency report every Tuesday and Friday
- Do not wait to be contacted by the Contract Specialist to prompt your follow up
- Timely contingency management is critical as it impacts:
 - Customer Financial Risk
 - Destination Closings
 - The 11 Step Program

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