

SIRVA Relocation Preferred Broker Network

SIRVA-Team Agent Training



Modules



Module 1 – The SIRVA Partnership & SIRVA-Team Agent Role

Module 2 – Departure Services (APEX 2.0)

Module 3 – Destination Services

Module 4 – SIRVA-Sister Company Support

Module 5 – Performance and Quality Expectations

SIRVA Team-Agent Test

Goal of Module 1



The primary goal of Module 1, The SIRVA Partnership & SIRVA-Team Agent Role, is to understand SIRVA's expectations and requirements of you as a SIRVA Team Agent.

The SIRVA Partnership

A globe showing the Americas, partially obscured by a horizontal bar and a pie chart. The horizontal bar is composed of several colored segments: red, yellow, orange, green, pink, purple, black, grey, and blue. The pie chart is also composed of several colored segments: blue, dark blue, black, green, purple, magenta, and olive green.

Module 1

Who is SIRVA?



- A leading worldwide provider of relocation and moving solutions, SIRVA Worldwide, Inc. provides more than 280,000 relocations per year to corporations, government employees, and individual consumers through its family of companies.
- SIRVA is the leading provider of end-to-end mobility services globally, offering over 50 mobility solutions in 170 countries through:
 - Complete management of the global supply chain
 - The world's leading global operations
 - Industry-leading risk management processes
 - Full accountability and transparency of all costs
- SIRVA's family of companies include [Allied](#), Allied International, Allied Pickfords, DJK Residential, Global, [northAmerican](#), northAmerican International, SIRVA Mortgage, SIRVA Relocation, SIRVA Move Management, SIRVA Global Relocation, and SIRVA Settlement.
- SIRVA Worldwide, Inc's corporate headquarters are in Oakbrook Terrace, IL
 - US Service Centers in Chicago, Cleveland, Ft. Wayne, Minneapolis, and St. Louis

The Basics of Working with SIRVA



What does SIRVA Relocation do?

- Handles all aspects of relocation, including home purchase and home sale services, household goods moving, mortgage services, and home closing, settlement services and all ancillary relocation services.
- Manages global relocation services in all regions around the world.
- Focus on corporate sustainability and being a truly “Green” company.
- Our TCO (Total Cost of Ownership) approach to relocation delivers a complete picture of the costs that both directly and indirectly impact a client’s mobility budget. With visibility into these costs, we can partner together to analyze spending, identify savings opportunities and build an effective cost-containment solution.

What should you know about partnering with SIRVA Relocation?



- SIRVA = To serve
- We look to our partners to follow our Core Values
 - **Unyielding Integrity** – In everything we do and stand for
 - Customer Centric – Anticipate customer needs and rising expectations
 - **Associate Oriented** – Fair, inclusive, upbeat work environment
 - Leadership Driven – A passion to be the best
 - **Performance Based** – Winning relative to the external market
- Managing the Total Cost of Ownership is key
- Risk management is everyone's responsibility
- Innovation-driven

SIRVA-Team Agent Role



What is a SIRVA-Team Agent?



- Only SIRVA Relocation's Preferred Broker Network can designate "SIRVA-Team Agents" (STAs).
- Relocation Directors have selected STA's based on the SIRVA required criteria.
- STA's have been selected to be experts when working with SIRVA Relocation transferees and associates.
- Only STA's are to be assigned to SIRVA referrals unless there is a specific request from a SIRVA transferee.
- Being an STA is a special designation that comes with high expectations by SIRVA as well.

SIRVA Team-Agent Qualifications



A “SIRVA-Team Agent” provides “Best in Class” service, understands the agent role and also meets the following standards.

SIRVA Relocation requires the following to be considered a SIRVA-Team agent:

- **Completed three (3) years experience successfully selling real estate full time**
- **Completed two (2) years experience handling corporate relocations**
- **Closed a minimum of twenty (20) real estate transactions, six (6) of which were corporate referrals, within the last twelve (12) months***
- **Has completed specific brokerage-sponsored relocation training. Once this agent has been approved, the agent must complete SIRVA-Team Agent training within 60 days of approval and annually thereafter.**
- **Will complete all requested SIRVA documentation (including online submissions)**
- **Has been advised by Broker of & agrees to reflect and embrace SIRVA’s Core Values**

** NOTE: Due to differing economic conditions, some criteria may need to be adjusted or is not obtainable by market. If you are unable to acknowledge all criteria below for this agent, please be prepared to explain your rationale for including this agent on your SIRVA team. Exceptions to the stated Criteria may be made at the sole discretion of SIRVA Supplier Management on a case-by-case basis.*

SIRVA Team-Agent Role



The role of the SIRVA-Team Agent working with a SIRVA transferee is to serve as a face-to-face, local real estate expert on behalf of SIRVA Relocation.

The STA serves the following role:

- **Build trust with the transferees and create a positive experience**
- To give the best quality service while providing consistent and candid information about the transferee's market
- Provide all paperwork needed to SIRVA Relocation in a timely fashion and communicate the same message to the transferee that is being provided in BMAs (within 48 hours, including weekends), market activity reports (on a bi-weekly basis – price reductions, offers), etc.
- **Deliver service in a professional and ethical manner.**
- Provide consistent, timely, and valuable information to help transferees sell and/or purchase their home.
- Remember that SIRVA must be kept in the loop on **all** communications, offers, price reductions, and SIRVA is *your* client.

Commitment to Service Excellence



When a SIRVA referral is placed with an agent by the Broker, *that agent then represents SIRVA and is expected to act in a manner that supports SIRVA Relocation and its clients.*

SIRVA, at any time, may request an agent to be removed from the “SIRVA-Team” list and may also be requested to not receive future SIRVA referrals if he/she does any of the following:

- Consistently does not meet SIRVA paperwork turn-around times
- Discusses specific pricing with transferee at BMA appointment or other home sale benefits – EACH TRANSFEREE POLICY MAY DIFFER
- Pressures the transferee to share guaranteed purchase offer value
- Acts in a manner considered unprofessional or unethical by SIRVA
- Speaks inappropriately about SIRVA or its clients to transferees, agents, potential buyers or other parties
- Consistently does not submit market updates or is considered uncommunicative with SIRVA and/or it's transferees

SIRVA's Commitment to Partnership

Just as we ask you to make a Commitment to Service Excellence to SIRVA Relocation, SIRVA Relocation also makes a commitment to the SIRVA-Team Agent that we will:

- Treat you in a professional and respectful manner
- Communicate openly and candidly
- Provide the tools and training to make you more successful with SIRVA
- Endorse usage of SIRVA-Team Agents for our referrals
- Provide feedback and performance data on a quarterly basis so you may monitor how your results are aligning with SIRVA's expectations.



VIP Process



Expectations for VIP's

- **Is everyone a VIP?**
 - *No. There are certain, key individuals who require an extra level of care and attention*
 - *May be designated “VIP” at the client level or by SIRVA*
- **Expectations of today's clients**
 - **Availability** – Anytime with increasingly flexible hours to accommodate the VIP needs and schedules
 - **Only the very best team members working on a VIP's relocation**
 - **COMMUNICATION** – Timely, scheduled, clear, direct, and solution driven
 - **Confirm who the primary contacts will be for each portion of the relocation**
 - **It may NOT directly be the VIP for all situations**
 - **Flexibility** – Always review special requests, items “outside” of policy, and potential solutions with SIRVA BEFORE discussing with a VIP or their designated contact person
 - This would also include transferee requests to list a property above market value
 - **Ensure that whatever you're doing adds value for the VIP**
 - **Recognize the importance of the VIP and the impact their overall EXPERIENCE**

What Do We Ask of Our Suppliers for VIP's?

- **New levels of collaboration with SIRVA**
 - Everyone on the same page throughout the relocation experience
- **Conduct Needs Assessment – SIRVA will send to suppliers**
 - **SUPPLIERS SHOULD NOT CONDUCT AN ADDITIONAL NEEDS ANALYSIS**
 - *Where the information has been provided to SIRVA – do not duplicate asking these questions*
 - Likewise, if you learn something new from the VIP please contact the SIRVA Consultant ASAP to share the information. However, do not duplicate the same questions that SIRVA has already asked and provided information to you about
- **Always keep SIRVA in the loop on what is happening**
 - Appointments
 - Scheduled meetings
 - Discussions
 - Marketing activity reports
 - Requests to remove home from the market
 - Price reductions
 - Offers, etc.
 - If there is anything negative/upsetting for the VIP you **MUST** let SIRVA know first so we can collaborate on a solution and advise the client before the VIP is aware

Module 1 Summary

- SIRVA is a leading worldwide provider of relocation and moving solutions
- **SIRVA means “to serve” which we do by following “the SIRVA Standard”**
- Being a SIRVA-Team Agent is a special designation given to those agents who best exemplify the Core Values and embrace working with SIRVA
- **The role of the SIRVA-Team Agent working with a SIRVA transferee is to serve as a face-to-face, local real estate expert on behalf of SIRVA Relocation**
- ***VIP can win or lose a client account and should be treated with the respect and extra attention they deserve***

Please continue with Module 2 – Departure Services

