

# REAL ESTATE BROKERAGE MANAGEMENT

Presented by John Wu  
CIPS, CRB Instructor



## ABOUT JOHN WU

全美房地產經紀人協會 國際檢定課程(CIPS) 教師  
Instructor, Certified International Property Specialist (CIPS) National Association of REALTORS®

全美房地產經紀人協會 經紀業領導人課程(CRB) 教師  
Instructor, Certified Real Estate Brokerage Manager (CRB)

全美房地產經紀人協會 對台代表 2011-2014  
National Association of REALTORS(R) President Liaison to Taiwan 2011-2014

聖蓋博市政府山谷大道商家聯合會 主席  
Chairman, San Gabriel City Valley Blvd Stakeholders Group

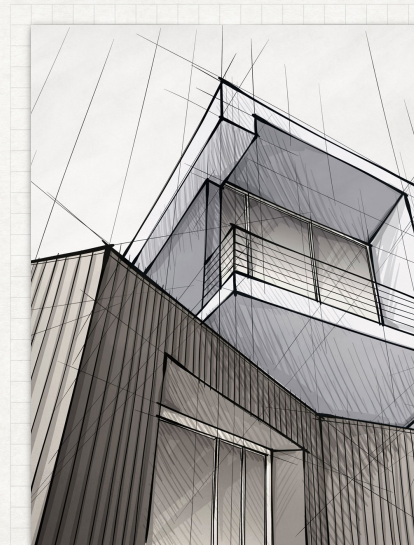
聖蓋博市政府學區監督委員會 委員  
LR Facilities Master Plan Oversight Committee member, SG Unified School District

美國西聖蓋博谷房地產公會 國際委員會 2010主席  
International Committee Chair, West San Gabriel Valley Association of REALTORS(R)

華裔房地產專業協會 2009年會長  
President, Chinese American Real Estate Professionals Association (CAREPA)

僑務委員會第一屆海外僑胞台灣房地產參訪團團長 2009  
Captain, OCAC Taiwan Real Estate Surveying Trip

加州房地產經紀人協會(CAR)國際商業房地產議題講師  
Invited Panelist with topic - International Commercial Investments and analysis, California Association of REALTORS®



## Course Goal

介紹美國房地產仲介公司店東管理的發展及現況。

說明美國店東如何透過不同的資源與平台，整合人力及市場策略，推動銷售量成長，維繫公司品牌、提升職業及道德規範、政府及公會新政策及法令的業內宣導。

促進業者(店東)實際的業務操作，協助旗下經紀人 Broker Associate/營業員 Salesperson 提高銷售額，降低糾紛與風險。

## Learning Objectives

房地產仲介公司管理基礎架構

招募新血或聘邀經紀人加盟方式介紹

經紀人及營業員的資源分配與管理

店東 Broker Owner/店長 Broker manager 的責任與義務

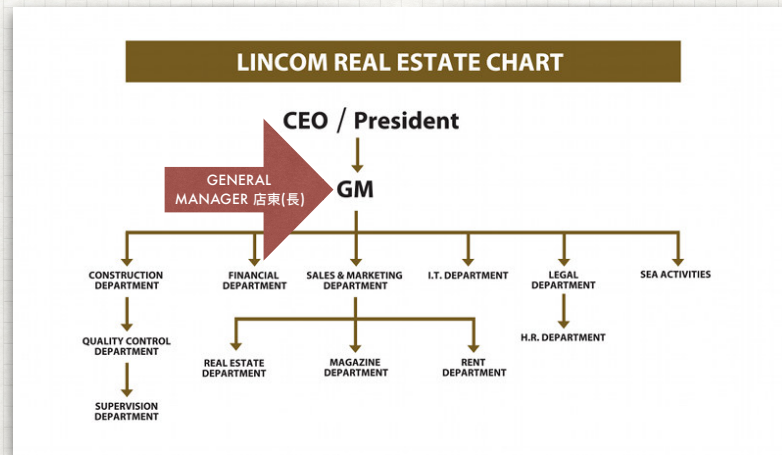
旗下員工的定期訓練

美國房地產仲介相關認證課程介紹

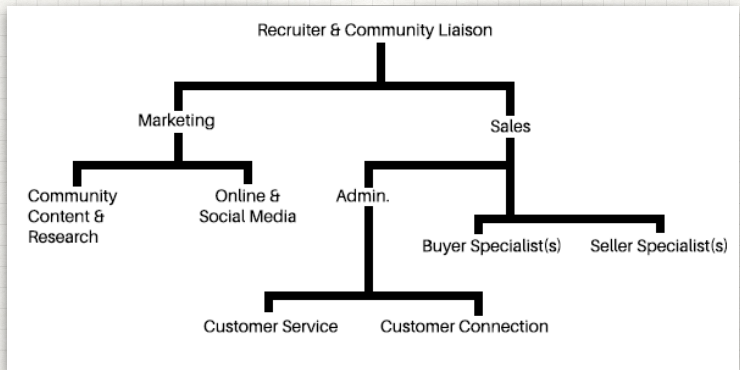


# 房地產仲介公司管理基礎架構

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# 房地產仲介公司管理基礎架構



- 經紀人 Broker
- 營業員 Salesperson
- 櫃檯接待 Receptionist
- 工程部經理 I.T. Manager
- 法務 Legal Consultant
- 市場部經理 Marketing Director
- 財政 Treasurer
- 秘書 Secretary
- 經理 Manager
- 清潔工 Maid



## 房地產仲介公司管理基礎架構 Structure



Broker Manager 經紀人 管理人

Broker Owner 店東

General Manager 總經理

首要任務: Mission:

掌控變局 Facing the Challenge of Change

管理格局 Management Skills

溝通 Communications

組織建構 Structuring Organization

成本管理 Budgeting & Financing Management

## 掌控變局 Facing the Challenge of Change



## 掌控變局 Facing the Challenge of Change

著眼大局 Your view of Big Picture

下一次波動 The Next Wave

預測未來 Predict the Future

科技的角色 Role of Technology

聯賣網的角色 Role of MLS

未來不動產仲介公司會在哪裡? Where will the real Estate office be?

未來十年 誰領導公司 Who will be leading the company in next 10 years?

未來業界的法規，將會是什麼樣子? What will industry regulations look like?

## 管理格局 Management Skills

Management Styles 管理風格

仲介公司管理者行為分析 Managerial Behavior

獨裁 Dictatorial Style

專制 Autocratic Style

參與 Participatory Style

放任 Laissez-Faire Style



## 溝通 Communications



## 溝通 Communications

口頭 Oral Communication

書面 Writing Communication

面對面 Face-to-Face Communication



Broker Manager to Sales employees 店東/店長與銷售員

Salesperson to Clients 銷售人員與客戶

Broker manager to Broker Manager 經理人對經理人

## 溝通 Communications

口頭 Oral Communication 包括：

表情 Facial Expression

肢體動作 Body Language

聲調 Voice & Tone



## 溝通 Communications

書面 Writing Communication

1. AIDA: Attention注意力、Interest引發興趣、Desire滿足期望、Action採取行動

2. 書面溝通比口頭溝通更有方向感。

書面溝通需要注意的事項：

Email, LINE, Wechat, Text, Clouds, Attachments

Responsibility: 話是風 字是蹤

Double Check before sending message 書面文字寄出前再三確認內容

Grammar & Spelling Check 文法錯字降低溝通成效及書面之效力

Way to show your professionalism 書面溝通是展現專業的機會



招募新血或聘邀經紀人加盟方式介紹  
*Recruiting, choosing and hiring your  
team members*

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招募新血或聘邀經紀人加盟方式介紹 *Recruiting,  
choosing and hiring your team members*

Employment Process 雇用程序

Recruiting 招募

Prescreen 前置檢視

Formal Interview 正式面談

Selection 選擇

Hire 雇用

招募新血或聘邀經紀人加盟方式介紹 *Recruiting,  
choosing and hiring your team members*

Recruiting 招募程序

Recruiting is the process of assembling a pool of candidates/applicants for consideration.

The greater the pool, the greater choices the company has.

所謂「招募」，是將一群可能符合應徵資格的人集中，  
從中尋適合找最適合公司需求人才的過程。  
人選多，公司就有更大的機會  
選擇到適合的人選。



## 招募新血或聘邀經紀人加盟方式介紹 *Recruiting, choosing and hiring your team members*

### Recruiting 招募程序

The current workers, managers, Agents can be best recruiting ambassadors.

公司現有員工、經理或經紀人都可以成為最佳的人才推薦者。

Major tools for external recruiting today  
對外招募的主要方式

Advertisement on Newspaper and Media 電子及平面媒體廣告  
Mailing Post cards or recruiting letters 郵寄招募廣告  
From local associations 從地方公會發掘  
Hosting Career Seminars 舉辦徵才博覽會

## 招募新血或聘邀經紀人加盟方式介紹 *Recruiting, choosing and hiring your team members*

### Prescreen 前置檢視

Prescreening is to decide if the applicant meet s the minimum requirements for position.

「前置檢視」可以篩選出哪些應徵者福和公司的「最基本」要求。

Can be done with: 「前置檢視」可透過下列平台完成

- Application form 職位申請書
- Resume 履歷表
- A phone conversation 電話應徵
- Video Conference conversation 視訊應徵
- Brief Face-to-Face meeting 簡短的面對面談話

Warning: Must focus on topics related to job only, do not violate the employment Law.

注意：任何形式的前置檢視，必須專注於與工作相關的問題，勿違反勞工法。

## 招募新血或聘邀經紀人加盟方式介紹 *Recruiting, choosing and hiring your team members*

### Formal Interview 正式面談

Broker Manager to prepare the interview: 面談的準備

Introduction: To break the ice 自我介紹 公司介紹 (破冰)



## 招募新血或聘邀經紀人加盟方式介紹 *Recruiting, choosing and hiring your team members*

### Formal Interview 正式面談

Work Experience 申請者的工作經驗

Reason to make a change 轉換公司的理由

Education 教育背景

Job related skills 與地產相關的工作技能

Performance 業績

Certification 認證課程

(CCIM認證商業投資師, CIPS國際房地產檢定專家, CRB店東店長領導人, CRS檢定住宅專家)

Community Involvement 參與社區事務



## 招募新血或聘邀經紀人加盟方式介紹 *Recruiting, choosing and hiring your team members*

Selection & Hire 選擇 & 雇用

Hire Quality, Don't hire Quota 寧缺勿濫

## 招募新血或聘邀經紀人加盟方式介紹 *Recruiting, choosing and hiring your team members*

加盟方式介紹



## 招募新血或聘邀經紀人加盟方式介紹 *Recruiting, choosing and hiring your team members*

加盟連鎖

Pros 優

- More resource 資源更多
- Better Image 形象較好
- Stronger Team 團隊合作
- Better Network 網路綿密
- More Reliable 意獲信賴
- Larger Referral Pool 轉介更多

Cons 劣

- Cost more 成本較高
- More Regulations 規範更多
- Less Flexibility 靈活度少

## 招募新血或聘邀經紀人加盟方式介紹 *Recruiting, choosing and hiring your team members*

加盟連鎖

Desk Fee Only: 桌子費

A desk fee is part of a payment agreement between a real estate agent and their broker.

Desk Fee Combined with Commission: 桌子費+佣金分成  
An alternative model to splitting the commission between the agent and the broker

No Desk Fee, Based on Commission split : 純佣金分成



## 招募新血或聘邀經紀人加盟方式介紹 *Recruiting, choosing and hiring your team members*

Desk Fee Only: 桌子費

Real estate agent who chooses Desk Fee only: 會選擇DFO的人:

Very Experienced in real estate professionalism but no Broker License  
在仲介業中已經有相當經驗，但沒有經紀人執照者

Brand new real estate professionals currently have clients and resources  
新入行的仲介，目前手上已經有現成客源及資源者。

Lousy Agent doesn't care much about reputation  
不求上進也不太在意品牌或商譽者

In-Home-Office Real Estate Agent  
平常不需公司資源的個體戶

## 招募新血或聘邀經紀人加盟方式介紹 *Recruiting, choosing and hiring your team members*

Desk Fee Combined with Commission: 桌子費+佣金分成

An alternative model to splitting the commission between the agent and the broker  
「桌子費+佣金分成」是「佣金分成」得另一種形式

Experienced real estate professionals but need a nice looking office and facilities  
有經驗的仲介但因客層需要經常使用辦公室以及公司設備

Confidence on Transactions Volume  
對於自己的交易額度有相當信心者

Need partial supports and resources from office; Legal, Accountant, Receptions.  
需要公司提供的部分資源，例如法務、會計或接線生

## 招募新血或聘邀經紀人加盟方式介紹 *Recruiting, choosing and hiring your team members*

No Desk Fee, Based on Commission split: 純佣金分成

New Agents joining the Firm for getting reimbursements of training & tuition.  
新入行的仲介，透過加入公司獲得訓練以及執照班課程學費的退款

More conservative on business, prefer less financial pressure.  
對於從事仲介業態度保守，傾向減少自身的財務壓力

Need an office, desk and facilities such as computer, copy machines, legal etc  
需要使用辦公室、桌子及各種公司設備如電腦、影印機、法務協助等。

Experienced real estate professionals who has good commission split w/Broker  
有經驗的仲介，靠行獲得更高比例的佣金者。

## 招募新血或聘邀經紀人加盟方式介紹 *Recruiting, choosing and hiring your team members*

Relationship of Commission and Experience: 佣金成數高低與經驗關係圖





## 招募新血或聘邀經紀人加盟方式

Recruiting, choosing and hiring your team members

### Commission Plans Based on \$200,000 Home Sale 3% Split

| Commission Plans                              | Monthly Fees | Error & Omission | 3% Real Estate Commission | Broker Receive | Agent Receive |
|---|--------------|------------------|---------------------------|----------------|---------------|
| 20/80%<br>Start Commission                    | \$0          | \$50             | \$6000                    | \$1200         | \$4800        |
| 10/90%<br>Commission<br>After 1 Million Sales | \$0          | \$50             | \$6000                    | \$600          | \$5400        |
| 50/50%<br>In House Referrals                  | \$0          | \$50             | \$6000                    | \$3000         | \$3000        |
| Commercial<br>Same                            | \$0          | \$50             | \$6000                    | \$3000         | \$3000        |

\* Real estate agents can have 100% Commission Plan with a \$99 Monthly Fee.

Resource : [realtorsexpert.com](http://realtorsexpert.com)

## 經紀人及營業員的資源分配與管理

## 經紀人及營業員的資源分配與管理

### Distribution and management of resources for Broker, Broker Associate Salesperson

The following may considered as Resources in Real Estate  
Brokerage Films 可列為房地產仲介公司的資源:

Tools & platforms help Broker/Agent to develop sources of Business  
可協助開發客戶的工具及平台

Phone calls from potential customer (Seller/Buyer) though Advertisement  
廣告效益所吸引的潛在客戶(買方或賣方)

Floor time opportunity (接電話時間)

Training Courses (訓練課程)

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The following may considered as Resources in Real Estate  
Brokerage Films 可列為房地產仲介公司的資源:

Good Team workers (Door Knocking) 好的團隊

Legal Advisors 法律協助

Hardwares and facilities 硬體以及公司設備

Awards Program 獎勵制度

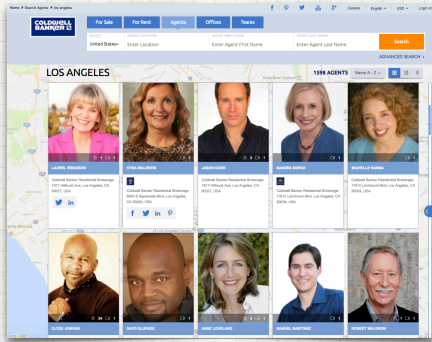


### 經紀人及營業員的資源分配與管理

## Distribution and management of resources for Broker, Broker Associate Salesperson

Tools & platforms help Broker/Agent to develop sources of Business  
可協助開發客戶的工具及平台

Official Website for sales associates 公司網站專屬個人網頁



### 經紀人及營業員的資源分配與管理

## Distribution and management of resources for Broker, Broker Associate Salesperson

Tools & platforms help Broker/Agent to develop sources of Business  
可協助開發客戶的工具及平台

Mass Mailing & Post Cards prospecting system 郵寄廣告系統



### 經紀人及營業員的資源分配與管理

## Distribution and management of resources for Broker, Broker Associate Salesperson

Tools & platforms help Broker/Agent to develop sources of Business  
可協助開發客戶的工具及平台

Video Templates 宣傳影片



### 經紀人及營業員的資源分配與管理

## Distribution and management of resources for Broker, Broker Associate Salesperson

Phone calls from potential customer (Seller/Buyer) though Advertisement  
廣告效益所吸引的潛在客戶(買方或賣方)





經紀人及營業員的資源分配與管理

Distribution and management of resources for Broker, Broker Associate Salesperson

Floor time opportunity (接電話時間)

| A                  | B           | C     | D      | E         |
|--------------------|-------------|-------|--------|-----------|
| (Mon) Sep 17, 2007 | NAME        | BREAK | DUTIES | EQUIPMENT |
| 1                  | 06:00-18:00 | *1*   |        |           |
| 2                  | 06:00-18:00 | *9*   |        |           |
| 3                  | 06:00-18:00 | *17*  |        |           |
| 4                  | 06:00-18:30 | *2*   |        |           |
| 5                  | 06:00-18:30 | *11*  |        |           |
| 6                  | 06:00-18:30 | *19*  |        |           |
| 7                  | 07:00-19:00 | *2*   |        |           |
| 8                  | 07:00-19:00 | *19*  |        |           |
| 9                  | 07:00-19:00 | *18*  |        |           |
| 10                 | 07:00-19:00 | *4*   |        |           |
| 11                 | 07:00-19:00 | *12*  |        |           |
| 12                 | 07:00-19:00 | *19*  |        |           |
| 13                 | 14:00-01:15 | *25*  |        |           |
| 14                 | 14:00-01:15 | *26*  |        |           |
| 15                 | 14:00-01:15 | *27*  |        |           |
| 16                 | 15:00-02:15 | *28*  |        |           |
| 17                 | 15:00-02:15 | *29*  |        |           |
| 18                 | 15:00-02:15 | *30*  |        |           |
| 19                 | 16:30-03:00 | *6*   |        |           |
| 20                 | 16:30-03:00 | *14*  |        |           |
| 21                 | 16:30-03:00 | *22*  |        |           |
| 22                 | 16:30-03:00 | *21*  |        |           |
| 23                 | 17:30-04:00 | *6*   |        |           |
| 24                 | 17:30-04:00 | *14*  |        |           |
| 25                 | 17:30-04:00 | *22*  |        |           |
| 26                 | 18:00-06:00 | *7*   |        |           |
| 27                 | 18:00-06:00 | *15*  |        |           |
| 28                 | 18:00-06:00 | *23*  |        |           |
| 29                 | 19:00-07:00 | *6*   |        |           |
| 30                 | 19:00-07:00 | *16*  |        |           |
| 31                 | 19:00-07:00 | *24*  |        |           |
| 32                 |             |       |        |           |
| 33                 |             |       |        |           |
| 34                 |             |       |        |           |



經紀人及營業員的資源分配與管理

Distribution and management of resources for Broker, Broker Associate Salesperson

Training Courses (訓練課程)



經紀人及營業員的資源分配與管理

Distribution and management of resources for Broker, Broker Associate Salesperson

Training Courses (訓練課程)

Cold Calling Technique 電話技巧

Door knocking Skills 敲門技巧

Contracts Refreshment 合約內容重溫

New Laws and regulations effecting business 新法令對業績影響

經紀人及營業員的資源分配與管理

Distribution and management of resources for Broker, Broker Associate Salesperson

Training Courses (訓練課程)

Door knocking Skills 敲門技巧





經紀人及營業員的資源分配與管理

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經紀人及營業員的資源分配與管理

*Distribution and management of resources for Broker, Broker Associate Salesperson*

Good Team workers (Door Knocking) 好的團隊

Similar Background 找背景雷同的夥伴

Sharing common value on business 確立核心價值

Cover each other 彼此保護



店東Broker Owner/店經理Broker manager的責任與義務



## 店東Broker Owner/店經理Broker manager的責任與義務

Recruit the RIGHT and HIGH quality, High productive salesperson  
招募高素質、高產值的人才納為公司旗下仲介

Be assessable  
隨時可以找得到人

Resolve the dispute internal or external  
協助解決公司內部及外部爭議

Professional Training and development 專業訓練

Organizing Conference and Sales Meeting 舉辦會議

Supervising Sales associates ethics and integrity 監控旗下仲介職業道德

## 店東Broker Owner/店經理Broker manager的責任與義務

Policy Manual 公司政策說明書



## 店東Broker Owner/店經理Broker manager的責任與義務

Content of Real Estate firm Policy Manual  
公司政策說明書相關內容

Introduction of the Company  
公司宗旨及介紹

Define the independent Contractor / Employee  
為仲介在公司的角色做定義

Confirm the independent contractor follow code of ethics  
確認或聘用仲介將遵照公司及公會之道德規範

Office Hours 公司開放時間

Use of Office 公司使用規範

Dress Code 服裝儀容要求

旗下員工的定期訓練



## 旗下員工的定期訓練

The purpose of Training 定期訓練的目的

What should be included in Training? 訓練課程的項目

Who will be the trainer? 誰是訓練者?

Any educational resources from Local Association(s)?  
所屬地區不動產公會提供教育資源。

## 旗下員工的定期訓練

The purpose of Training 定期訓練的目的

Keep the knife SHARP 保持員工對仲介事業的敏銳度及清醒。

Self-regulated paced Routine 培養員工的自律

Make sure the employees follow the company culture  
落實員工跟進公司的文化

Create better relationships with colleague  
與同儕建立更好的關係

Motivate employees to work harder 激勵員工的努力向上意志

## 旗下員工的定期訓練

What should be included in Training? 訓練課程的項目

Sales Training and sharing 銷售訓練及經驗分享

Loan Class 貸款課程

Tech Class 科技課程

Script Practice 台詞訓練

Purchase Agreement/ Listing Agreement 銷售/專賣合約訓練

Group Coaching 團體訓練

Business Development 事業提升訓練

Escrow Seminars 代書(地政士)講座

Dialing for Dollars \$\$\$ 打冷電話

Others 其他

## 旗下員工的定期訓練

Who will be the trainer? 誰是訓練者?

Broker Owner / Broker manager 店東/店長

Hire the professionals 外聘講師

Affiliates 異業合作

Legal Professionals (Contractor) 法律專才

Computer Specialists (Contractor) 電腦顧問

Staffs and agents 自家員工與仲介



## 旗下員工的定期訓練

Any educational resources from Local Association(s)?  
所屬地區不動產公會提供教育資源。


**Monday, November 19th**

**zipForm® Plus Training**

When:  
**Monday, November 19, 2018**  
9:30AM to 12:30PM

Topics include: zipForm® Plus Templates, Checklists, Toolbar Functions, Digital Signatures/Esign, Forms Tutor, Forms Advisor and more!

[Click here to register](#)




**Tuesday, November 27th**

**Dominate Your Market**

When:  
**Tuesday, November 27, 2018**  
10AM to 11AM

Peak Performance Strategy Session with Karissa Kouchis

[Click here to register](#)



## 美國房地產仲介相關認證課程介紹

## 美國房地產仲介相關認證課程介紹



## 美國國際認證—不動產經紀領導人 Certified Real Estate Brokerage Manager (CRB)



關於不動產領導人課程 About the CRB

The Certified Real Estate Brokerage Manager (CRB) designation is designed for experienced owners, brokers, managers, and supervisors to raise professional standards, strengthen individual and office performance, and sharpen expertise in brokerage management. Since 1968, CRB has represented the highest level of professional achievement in real estate brokerage management. You do not need a broker's license to earn the CRB designation.



## 美國國際認證—不動產經紀領導人 Certified Real Estate Brokerage Manager (CRB)



不動產領導人認證課程的授課對象：

- 具備經驗的不動產投資商
- 不動產仲介經紀公司店東
- 直營或加盟公司之店長、主管
- 希望提升專業水準、強化個人條件、提高公司績效的不動產仲介公司管理者。
- CRB 迄今成立滿50年，在美國不動產業界享有最高的專業成就。

## 美國國際認證—不動產經紀領導人 Certified Real Estate Brokerage Manager (CRB)



獲得不動產經紀領導人資格的優勢 What You Gain from CRB:

- Increased profitability, productivity, and performance – the median gross income of a CRB is 146% higher than that of a non-CRB designee.
- Placement ahead of the information and knowledge curve.
- Strengthened ability to sustain your business and remain competitive.
- Recognition as a member of an elite, worldwide community of industry leaders – only 3% of REALTORS® have met the designation's advanced eligibility and training requirements.

## 美國國際認證—不動產經紀領導人 Certified Real Estate Brokerage Manager (CRB)



獲得不動產經紀領導人資格的優勢：

- 增加收益、業績產能，CRB資格的經紀人，平均收入高出非CRB資格經紀人146%
- 提前得知市場走向及最新趨勢
- 強化在業界的生存力(Sustain your business)、保持競爭力(Remain Competitive)。
- 在美國業界獲得認可的菁英資格，全球不動產經紀業中只有3%的房仲業者能達到CRB認證資格所需之能力及訓練要求。

## 美國國際認證—不動產經紀領導人 Certified Real Estate Brokerage Manager (CRB)



The CRB Designation Program is all **NEW!**

For more information, visit [www.REBINstitute.com](http://www.REBINstitute.com).

### New 1-day CRB Courses

- Recruiting for Success: Creating a Vibrant Real Estate Organization
- 為成功招募 創造活力充沛的不動產組織
- Creating a Profitable Real Estate Company
- 創要獲利良好的不動產仲介公司
- Show Me the Money – Compensation Planning
- 錢途光明 - 佣金制度的規劃
- Performance Leadership – Coach, Manage & Mentor
- 績效領導 輔導、管理及指導



美國國際認證—不動產經紀領導人  
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**New 1-day CRB Courses**

- The Firm Rules – Company Policies to Mitigate Risk
- 公司制度 – 降低風險的公司政策
- Managing a Multi-Generational Business
- 多世代並存的公司管理
- Building a Business Plan that Gets Results
- 制定成效卓越的公司計畫
- HR Solutions for Today's Real Estate Company
- 今時今日不動產公司的人力資源解決方案
- Exit Strategies for Real Estate Brokerage Owners 不動產仲介公司退場機制

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美國國際認證—不動產經紀領導人  
Certified Real Estate Brokerage Manager (CRB)



取得CRB資格

- (1) 完成3門CRB課程
- (2) 擁有一年以上管理經驗
- (3) 提交CRB認證申請書及管理經驗簡歷
- (4) 提交CRB認證申請費用

美國國際認證—不動產經紀領導人  
Certified Real Estate Brokerage Manager (CRB)



**為成功招募-創造活力充沛的不動產組織**

本節課程您將能學到：

- ☑ 為何人才招聘對公司至關重要
- ☑ 簡化招募策略及流程
- ☑ 建立並保有蓬勃的公司文化
- ☑ 發掘並續留頂尖人才
- ☑ 如何與組織內不適任的夥伴分手

美國國際認證—不動產經紀領導人  
Certified Real Estate Brokerage Manager (CRB)



**績效領導-輔導、管理及指導**

本節課程您將能學到：

- ☑ 培養出與企業文化契合的頂尖業務人員
- ☑ 依據個案及實際狀況，評估並調整領導風格
- ☑ 善用績效策略，讓業務同仁完全發揮潛能
- ☑ 創造符合業務成長之永續人才續留策略
- ☑ 明定並實行激勵措施及激勵因素



## 美國國際認證—不動產經紀領導人

*Certified Real Estate Brokerage Manager (CRB)*



### 創造獲利良好的不動產仲介公司

本節課程您將能學到：

- 📄 瞭解財務專業用語及報告
- 📄 因應提高的獲利調整領導方式
- 📄 以招聘策略為基礎制定事業計畫
- 📄 招聘並留任績效頂尖的團隊成員
- 📄 授權財務流程，專注於團隊建立