

Your job title: **Outbound Sales Agent (OSA)**  
Where you will work: [Team Office Location]  
Who's the Boss: [Direct Manager's Name]

### Who are we?

Modify the following text to reflect your team's value proposition] *The mission of the [Team Name] team is to provide the premier customer service experience for each home seller and home buyer we work with. Knowledge we've gained through years of working in the local market empowers us to provide our home buyers and sellers with the advice they need to make informed decisions. Whether it's selling a home, searching for a home, or negotiating a contract, each member of the [Team Name] team is an experienced real estate professional who applies their expert skills to each step of the process to help each client achieve an outstanding result.*

### Who are we looking for?

The Outbound Sales Agent is passionate about achievement and draws energy from working with people. This enthusiastic, self-starting person with a passion for selling is responsible for converting a massive amount of leads into appointments through personalized follow-up.

This individual will take ownership of leads and actively systematize the conversion process for maximum effectiveness. They record their productivity and sales metrics and track the results in regular accountability meetings. This person has the drive and tenacity to achieve or exceed productivity, appointment setting, and revenue targets while responding efficiently to customer inquiries (usually in the form of sales leads) and the subsequent documentation, assignment, and follow up of those leads.

This individual must be highly trustworthy—in addition to being the first point of contact to the team, they will also have access to sensitive files and information regarding associates, customers, and finances.

The Outbound Sales Agent's activities directly affect the bottom line, and as such they are deeply committed to the team achieving greater and greater levels of success, as well as to growing their own skills and developing into a leader within the team.

[Modify this narrative as necessary to meet your team's needs.]

### What will you do?

*These are the standards a well-above-average performer will maintain or exceed:*

- Maintain rigorous prospecting for new business opportunities
- Achieve productivity, appointment setting, and revenue targets
- Consult with real estate agents to ensure fiduciary service of the real estate transaction from initial contact through the listing agreements

### Essential duties and responsibilities

- Outbound cold calling to convert leads to appointments
- Follow scripts to deliver the team value proposition and handle objections
- Qualify leads to accurately convey motivation, competition, and financial specifics to real estate agents
- Manage database of leads to ensure processes run smoothly and there is rigorous lead follow-up
- Accurately track and report productivity and sales metrics
- Understand and internalize evolving real estate trends in the local market
- Understand and adhere to local, state, and federal laws regarding real estate brokerage services

**Communications/Interactions**

- Outbound leads – daily
- Agents on team – daily
- Direct manager – daily

**Management Responsibilities**

- None, though a talented performer in this role may move into a leadership position

**Knowledge/Skills**

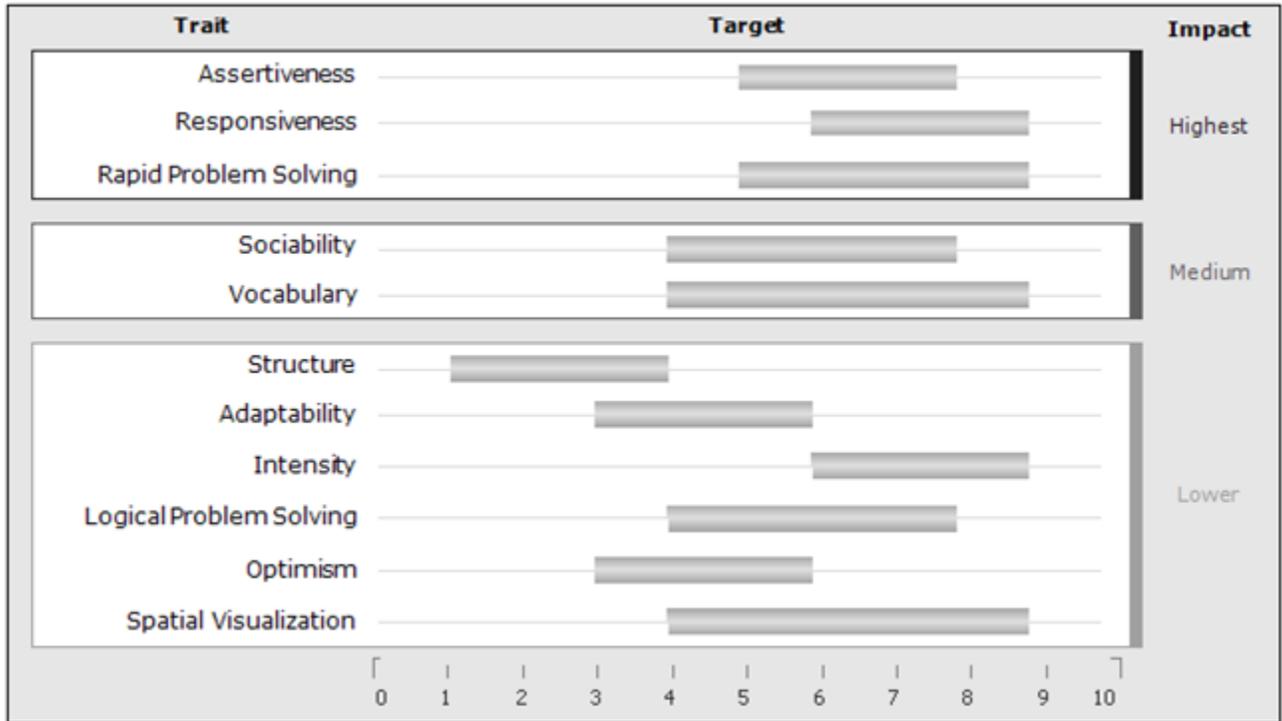
- Strong written and verbal communication skills
- Exceptional telephone skills—ability to set and close appointments over the phone and willingness to spend the majority of the workday on the phone
- Ability to learn and internalize scripts and dialogues
- Ambitious with proven ability to succeed
- Learning based
- Team player
- High school graduate
- Real estate license
- Demonstrable record of sales success against quotas

**Compensation**

*Fill in as appropriate for your team /organizational structure. Consider base salary, health insurance, performance-based bonuses, Profit Share, and other employee benefits.*

## Team: Outbound Sales Agent

The chart below describes the key talents and personality traits of a person matching the Team: Outbound Sales Agent job at Keller Williams.



*Traits appear in order of importance to the job. Gray bars indicate each trait's target range. Traits without a gray bar are not predictive.*

### Highest Impact Traits

**Assertiveness:** The target for this trait is medium high. People in this range are assertive and results-driven individuals who enjoy taking action. They are decisive and competitive, and they prefer a direct approach to getting things done.

**Responsiveness:** The target for this trait is medium high. People in this range are responsive and quick in their reactions. They are naturally fast-moving and action-oriented, and they tend to operate with a sense of urgency. They tend to be dissatisfied with slow-moving environments.

**Rapid Problem Solving:** The target for this trait is medium high. People in this range can solve problems in rapid succession using a quick, intuitive approach. They like to have new issues to deal with every day. They can typically handle smaller issues quickly and move on to the next one without pausing.

### Medium Impact Traits

**Sociability:** The target for this trait is medium high. People in this range display a good level of natural sociability. Characteristically, they take a genuine interest in other people and in meeting their legitimate needs. They have good capacity for communicating effectively and for keeping people informed.

**Vocabulary:** The target for this trait is medium high. People in this range learn easily and quickly from their environments. They pick up new information readily and learn rapidly when circumstances change. They typically make use of a wide range of acquired experience and knowledge in making decisions, deciding on a course of action, or adjusting to a changed environment.

### **Lowest Impact Traits**

**Structure:** The target for this trait is low medium. People in this range enjoy unstructured work settings that provide them with flexibility and independence. They dislike stringent rules and restrictions, and they are drawn to open-ended lines of work. They have tolerance for uncertainty and ambiguity and adapt well to less-defined work roles.

**Adaptability:** The target for this trait is medium. People in this range are concerned about doing what is correct according to accepted standards. They will typically be fair and consistent, but they will not compromise on important issues.

**Intensity:** The target for this trait is medium high. People in this range like to deal directly and energetically with obstacles at work. They feel a strong emotional drive to overcome difficulties and develop solutions when problems arise.

**Logical Problem Solving:** The target for this trait is medium high. People in this range have a good ability to solve complex problems logically. They are able to pull difficult issues apart to deal with the components one by one. They like being able to think through a problem or solution in order to present it carefully and logically to others.

**Optimism:** The target for this trait is medium. People in this range are generally friendly and have a positive attitude toward others. They tend to take people and situations at face value unless there is some reason to be skeptical.

**Spatial Visualization:** The target for this trait is medium high. People in this range have a strong ability to think in three or more dimensions. This helps them deal easily with structural or spatial tasks. This ability is related to solving design, engineering, and mathematical problems. It also helps them deal with some kinds of abstractions, such as systems and complicated environments with many variables in constant flux.