

Your job title: **Transaction Coordinator**

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 Transaction Coordinator is an individual who is outgoing, draws energy from working with people, and is optimistic. They have a strong sense of urgency, but not at the expense of quality. In addition, he/she demonstrates on a daily basis the knowledge, attitudes, skills, and habits of a high achiever who is committed to putting clients first, doing the right thing, and seeking win-win agreements. The Transaction Coordinator must be adaptable to change and be solutions oriented. He/She will manage the entire contract-to-close process efficiently and effectively to ensure all transactions close on time, with little or no hassle to clients and third parties. This individual must provide exceptional customer service.

[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:*

- Provide exceptional customer service throughout the entire closing process

### Essential duties and responsibilities

- Act as liaison between real estate agents, clients, attorneys, escrow companies, and mortgage brokers during the process of a real estate sale and effectively manage the administrative tasks involved in closing a sale
- Create timelines and follow up with individuals as needed to ensure all deadlines are met and contingencies are released
- Maintain accurate and compliant files for all transactions
- Create a house file (either in Dotloop or physical) for all transactions
- Create Greensheets
- Understand the contracts in order to summarize all important terms, conditions, and contingency dates
- Communicate with the agent several times throughout the transaction including all important dates, missing documents, calendar reminders, file compliance status, etc.
- Communicate regularly with the client to send them reminders, check in, and let them know what to expect in each step of the closing process
- Establish relationships with all third parties including lenders, inspectors, appraisers, and all agents in order to ensure a smooth closing process and share relevant information
- Draft any addenda needed along the way and keep a record of them on file and ensure they are shared with relevant parties
- Be the first point of contact/resource for all questions that arise throughout the closing process from agent (and client, attorneys, lenders, appraisers, other transaction coordinators/Realtors, etc.)
- Stay in good communication with the agent if any issues arise that they need to handle or negotiate
- Coordinate closing date, time, and location and notify all parties

- Notify client about utility accounts to set up/cancel
- Draft a commission statement for our listings and verify commissions for our buyer side transactions prior to closing (along with utility and other pro rations)
- Put together the closing file for the agent including any documents needing signatures/initials/dates, commission amount for the check to bring back, and any other documents needed from closing
- Close out the file after the closing including changing the MLS status to closed for our listings, double-checking the file, making an electronic copy of the HUD, and processing the check. Add closed file to Dotloop.
- Follow up with clients after the sale to check in and request a testimonial

### **Communications/Interactions**

- Lead Agent – daily
- Agent Team – daily
- Buyers/Sellers/Vendors – daily

### **Management responsibilities**

- Showing Assistants

### **Knowledge/Skills**

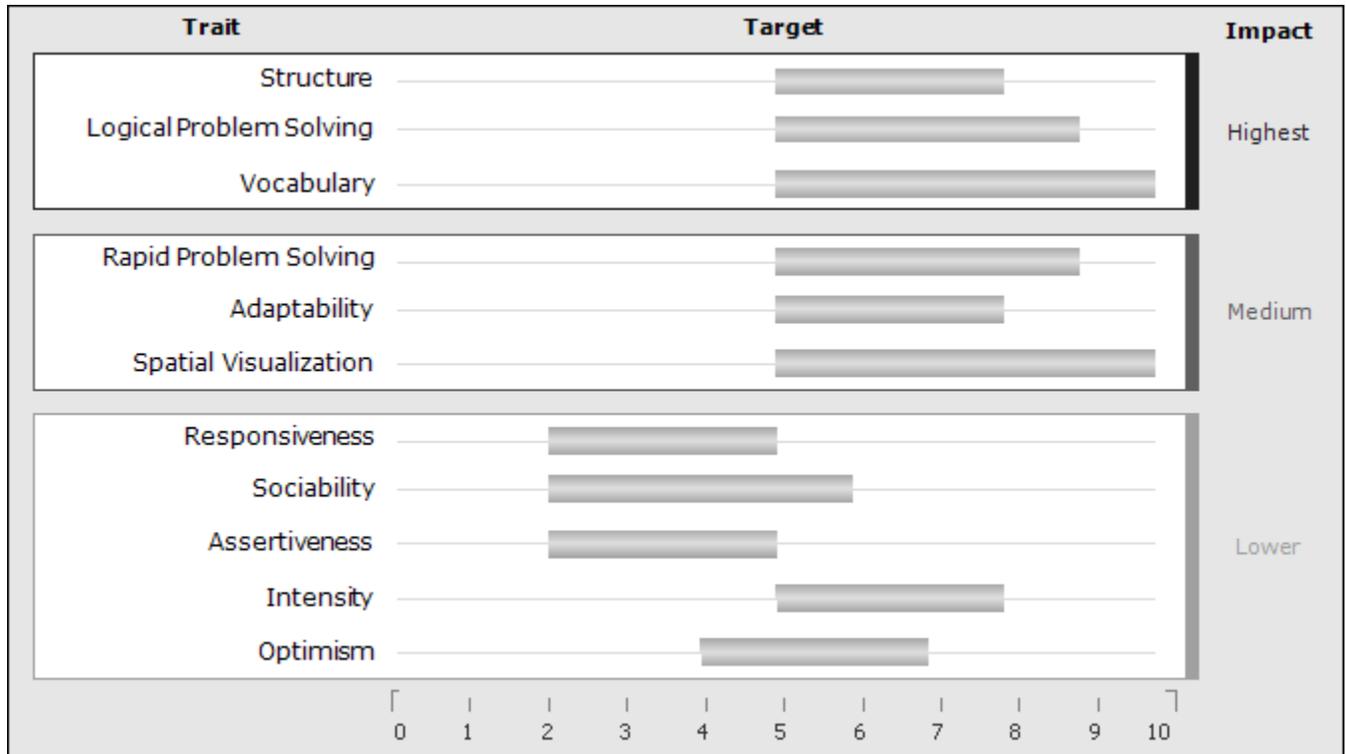
- Excellent at building rapport
- People oriented
- Strong written and verbal communication skills
- Good organizational skills
- Learning based
- Willing to learn scripts and dialogues
- High school graduate
- Real estate license

### **Compensation**

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

## Team: Transaction Coordinator

The chart below describes the key talents and personality traits of a person matching the Team: Transaction Coordinator 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

**Structure** The target for this trait is medium high. People in this range naturally focus on maintaining a structured environment and processing work in an organized manner. They are receptive to rules and regulations and to specific criteria for measuring success. While they prefer to avoid routine work and delays, they see the importance of carefully attending to crucial details.

**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.

**Vocabulary** The target for this trait is 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 as needed.

## Medium Impact Traits

**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.

**Adaptability** The target for this trait is medium high. People in this range are adaptable and are typically agreeable and pleasant when working with others. They find it easy to be sympathetic and supportive to others, and they work hard to avoid misunderstandings.

**Spatial Visualization** The target for this trait is high. People in this range are able think about and visualize complex systems. They are able to deal with problems in which there are multiple variables that are constantly changing. They can create mathematical models of problems in order to get to solutions. They can mentally manipulate variables in complex models to understand what will happen when something changes.

## Lowest Impact Traits

**Responsiveness** The target for this trait is low medium. People in this range maintain a useful degree of responsiveness and time sensitivity while avoiding impulsive or rash reactions. They are motivated to meet deadlines and organizational standards while keeping activities running smoothly and projects under control.

**Sociability** The target for this trait is low medium. People in this range are reserved and conservative on a social basis. They tend to be low-key rather than outgoing or spontaneous, but they can enjoy friendly exchanges with others. They are willing to approach new people for a specific purpose or to accomplish a concrete goal.

**Assertiveness** The target for this trait is low medium. People in this range are naturally conservative in their actions. They prefer to think things through and to gauge potential outcomes before taking action. They are not typically demanding nor do they have the need to dominate other people or situations.

**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.

**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.