



The Director's Pack

**A guide to training
strategy for estate
and lettings agents**

Why Train?

94%

of learners said that they see the career benefits of taking the time to learn

(According to LinkedIn Learning Data May 2020)

83%

of online learning happens during the work week

((According to LinkedIn Learning Data May 2020)

TO RETAIN STAFF

94% of employees say they would stay at a company longer if it invested in their learning and development. Staff leave, or fail to hit targets if they aren't given the tools to do their job properly.

IT'S NOT JUST ABOUT COMPLIANCE...

Be confident that your staff are property experts.

Knowledge gives people confidence – whether that's in offering advice or in asking for higher fees. How can you set a target without giving staff the tools to hit the target?

IT SOLVES SPECIFIC PROBLEMS

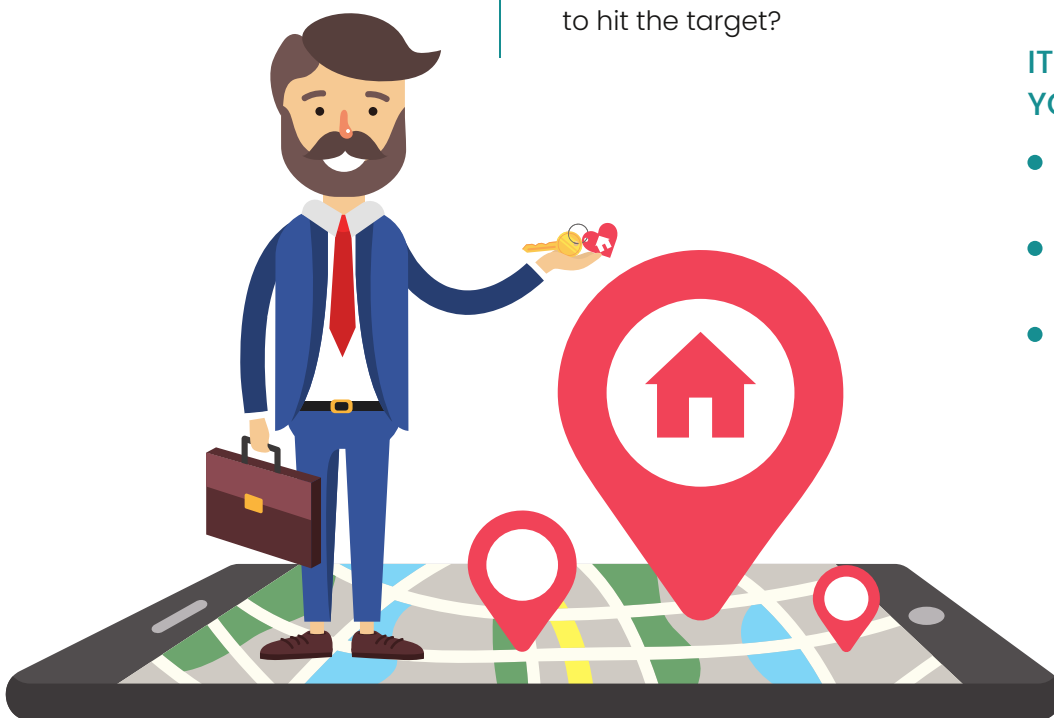
- Improves the quality of your company database for you
- Increases fees
- Encourages more property management clients
- Generates more mortgage leads
- Improves customer service
- Improves sales confidence
- Proof of CPD
- Validates compliance

SUPPORT INDIVIDUAL STAFF MEMBERS

- Solve confidence and specific performance issues

IT WILL HELP YOU GROW YOUR BUSINESS..

- Confident staff charge higher fees
- Confident staff are able to cross-sell
- Expert staff offer excellent customer service



An Hour a Month to get the Most Out of Training

A Guide for Managers

www.theableagent.co.uk/book-a-one-to-one-with-catherine

How to build training into your busy agency day

The key to training is to have a clear idea of what you want to achieve and use the training to achieve it.

- Gain Legal Confidence
- Higher fees?
- Better customer service?

Hit targets

You have access to a How to Course

[How to use the Able Agent course.](#)

SET A GOAL FOR YOUR STAFF

Whether you would like them to be more confident in sales, have better knowledge of legislation or just get better at customer service – there is a course route for you.

The Able Agent has been designed to be flexible – you can follow the course content in any order.

If they decide to sit the formal qualification they **MUST** complete the core 5 modules to be prepared for the exam.

You can do this via a skills analysis

Before they start – why not think about how much they know or don't know currently!

HOW TO USE THE SKILLS ANALYSIS TOOL

- Book 15 minutes into your diary
- Read the ranking system and get them to mark themselves 1* – 5*
- Once completed, check it makes sense. Do the areas where the scores are high reflect where they excel and do the lowest scores reflect where they struggle?
- Review the skills analysis in 6 months' time and see what has happened to the scores

Topics to consider for training

▶ MAKE TRAINING EASY

- 25 minutes per day
- You should work how you like training to work. If doing an hour every 2 days works better for you – in a quiet room – then suggest that
- If you are happy grabbing 10 minutes between appointments – that's fine too

Make sure you **complete** each lesson so that you can pick up where you left off each time.

▶ EXPAND knowledge....Think about different scenarios that are positive, to showcase your business....This will make the training more relevant.

- The property that sold via auction and achieved a really high price
- The vendor who used your agency, after previous fall throughs
- The Landlord who converted to full management service
- The First Time Buyer who saved money on their mortgage
- The market appraisal lead that you did really well
- The laws you helped a colleague with

Monitor training via the reporting tool

Monitoring is how you get the most out of training i.e. if you are aiming to improve the quality of detail on your database....

- ▶ Make sure you have access to the report tool in Able Agent

What could be improved?
Notes, email addresses,
reason for move
etc

- ▶ FIRST set a measurement....

YFor example - more detailed notes in a certain box in your CRM system

- ▶ THEN train staff in terms of what you want to see:

- E.g. Reason for move
- Ideal property
- Timescale
- Services offered....

- ▶ Choose the relevant Able Agent course. THEN monitor it. Check the team have completed the course and used it in their job role e.g made the relevant notes

Track the progress of different staff members through their training with the reporting tool

See who's falling behind and know when to register a team member for their qualification exam

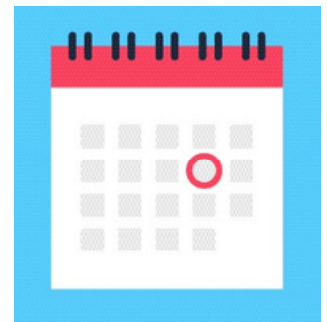


NO TIME?

Take away the HR headache of training and CPD...

Use The Able Agent!

- Pick the relevant courses
- Set a deadline
- Ask staff to submit certificates when completed by a certain date
- Use The Able Agent reporting tool to check the courses have been completed



Make it fun!

Maybe offer a prize for first to complete the course, host monthly quizzes

Ask us for more ideas.....

Book a one to one with Catherine for help setting up your training plans

www.theableagent.co.uk/book-a-one-to-one-with-catherine



Modules



New Starters

Designed to support managers with a resource to train new to industry team members.



Estate Agency Essentials

How to review and challenge to keep business growing.



Letting Essentials

Give staff rounded lettings confidence.



Sales Skills & Customer Service

Reinvigorate staff with fresh ideas to win business and retain more clients.



Legal Compliance

Ensure confidence in legal terminology and general property law.



Property Management

Covers the key Processes, Systems and Management.



Auction

Understand the processes at auction and the different methods of selling.



Listing & Market Appraisals

Convert more market appraisals to listings and at higher fees.



Sales Progression

Become confident in the process of completing sales.

Tools for your Team

- Knowledge & Skills Analysis
- Staff Appraisal
- Training Timetable and Lesson List
- Market Appraisal Booking Form
- Guide to Employing an Apprentice
- Agency Management course add on

Knowledge & Skills Analysis

A skills and knowledge matrix helps managers to understand how to make the most of the skills and knowledge in their teams.

Use this skills and knowledge matrix tool to:

- Identify strengths and where there may be gaps
- Identify areas to guide staff development
- Define which training may be of use

HOW TO USE THE MATRIX

- 1 Decide who is going to complete the matrix - the manager, the employee or both. There are pros and cons to whichever one you choose.
- 2 Read the ranking system and come back to it when you are uncertain.
- 3 Once completed, check does it make sense? Do the areas where the scores are high reflect where you excel and do the lowest scores match where you struggle?
- 4 Are the right people with the right skills and knowledge doing the right tasks?
- 5 Assign those with the most needs to The Able Agent® online training and do the skills matrix again in 6 months and see what has happened to the scores.

RANKING SYSTEM

Score	Skill Level	Description
5 ★★★★★	Expert	• Fully capable, experienced and knowledgeable • Sought for help by others • Needs no assistance • Seen as a subject expert
4 ★★★★	Capable	• Capable and experienced • Demonstrates knowledge • Able to work independently with little help • Will be expert with more knowledge and time
3 ★★★	Adequate	• Able to perform routine tasks • Has some direct experience • Unsure of knowledge • Needs help from time to time
2 ★★	Basic	• Limited in knowledge • Cannot carry out critical tasks • Needs significant help from others
1 ★	Low	• Little or no experience or knowledge • Requires full supervision

Knowledge & Skills Analysis

Name _____ Date completed by _____

GENERAL PROPERTY KNOWLEDGE

	★★★★★	★★★★	★★★	★★	★
Membership bodies - redress schemes					
The Importance of Notes					
Hot calling					
Applicant management					
Time management					
Empathy and trust					
Mastering phone skills					
Dealing with angry clients					
Handling abusive calls					
Writing a professional email					
Questioning skills					
Selling using features and benefits					
Overcoming Objections					
Closing techniques					
Managing a well categorised applicant list					
Following up a new applicant					
Proactively generating viewings					
Viewing feedback					
Cross selling mortgages					
Cross selling conveyancing					
Dealing with investors					
Stamp duty / LBTT					
Booking a perfect market appraisal					
Handling fee enquiries					
Consumer Protection Regulations 2008					
Cooling off period					
Data Protection Act / GDPR					
Equality Act 2010					
Health and safety					
Anti-money laundering					
Town & country planning - boards, permitted development					
Contract law					

KEY: Expert ★★★★★ Capable with good knowledge ★★★★ Adequate could do with more knowledge ★★★ Basic limited knowledge ★★ Low/unknown no knowledge ★

Knowledge & Skills Analysis

Name _____ Date completed by _____

GENERAL PROPERTY KNOWLEDGE

	★★★★★	★★★★	★★★	★★	★
Land law (Tenure/easements and covenants)					
Building regulations					
Party Wall Act					
Enquiries					
Managing a chain					
Testimonials and new business					
Property Structure					

ESTATE AGENCY

	★★★★★	★★★★	★★★	★★	★
Private treaty and other methods of sale					
Auction					
Tender					
Estate Agents Act 1979					
Referral fees guidance					
Negotiating a sale					
Encouraging and taking offers					
Informal tenders (best and final)					
Price reductions					
Vendor contact					
Gazumping and gazundering					
Understanding surveys					
Dealing with a tricky survey					
Retentions and down valuation					
Property searches					
Title and land registry					

KEY: Expert ★★★★★ Capable with good knowledge ★★★★ Adequate could do with more knowledge ★★★ Basic limited knowledge ★★ Low/unknown no knowledge ★

Knowledge & Skills Analysis

Lettings & Property Management

	★★★★★	★★★★	★★★	★★	★
Inventory					
Check in					
Periodic Inspection					
Fair wear and tear					
Rent reviews					
Tenancy renewals					
HMOs (Houses in Multiple Occupation)					
Selective licensing					
Town and Country planning – C3 and C4 Use Class					
Dealing with anti social behaviour					
Duties of the property manager					
Emergency repairs					
Repairs in practice					
Condensation					
Contractors					
Landlord tax					
Rent arrears					
Insurances					
Client money					
Ending tenancies					
Deposit deductions and disputes					
Abandoned Goods					
Check out					
Landlord and tenant obligations					
Assured shorthold tenancy / PRT Scotland					
Deposit legislation					
Electrical Safety					
CGI Safety					
Non-Housing Act tenancies					
Joint and several liability					
EPC and minimum standards					
Legionnaires / Damp & Condensation					

KEY: Expert ★★★★★ Capable with good knowledge ★★★★ Adequate could do with more knowledge ★★★ Basic limited knowledge ★★ Low/unknown no knowledge ★

Market Appraisal Booking Form

Date	Booked by	For Lister
Property address		
		Postcode
OWNER (S)	Mr/s	First Name
		Surname
		Mobile/landline
Correspondence address (if different to above)		
PROPERTY DETAIL		
Type - description		
How long at the property?		
How much work have you done?		
Extended? Y/N		Access to certs? Y/N
Is there anything you think should be done to help it sell?		
What are the property's wow factors?		
Freehold/ leasehold - years left on lease? Ground rent?		Council tax band?
How much do you know about the property's value in the current market?		
How far have you got getting the property on the market?		
How far have you got sorting out your finances?		
		APP offered?
When was the last time you moved?		
How did you find that process?		
FIRST TIME SELLER Y/N		

Staff Appraisal

Name	Position	Ref
Year or period covered	Length of service	Time in present position
Appraisal date & time	Appraiser	

PART A Appraisee to complete before the interview and return to the appraiser by (date)

A1 State your understanding of your main duties and responsibilities.

A2 Discussion points:

1. Has the past 3- 6 months been good/bad/satisfactory or otherwise for you, and why?

2. What do you consider to be your most important achievements of the past year?

3. What do you like and dislike about working for this organisation?

4. What elements of your job do you find most difficult?

5. What elements of your job interest you the most, and least?

Most

Least

6. What do you consider to be your most important aims and tasks in the next year?

7. What action could be taken to improve your performance in your current position?

By You

By Your Boss

8. What kind of work or job would you like to be doing in one/two/five years time?

9. What sort of training/experiences would benefit you in the next year? Not just job-skills, also your natural strengths and personal passions you'd like to develop - you and your work can benefit from these.

10. Score your own capability or knowledge in the following areas in terms of your current role requirements: (1-3 = Poor, 4-6 = Satisfactory, 7-9 = Good, 10 = Excellent).
If appropriate bring evidence with you to the appraisal to support your assessment.

- | | | | | | |
|--|--------------------------|--------------------------------------|--------------------------|--------------------------------------|--------------------------|
| 1. Sales skills | ☐ | 6. Product/technical knowledge | ☐ | 11. Time management | ☐ |
| 2. Admin tasks | ☐ | 7. Team work | ☐ | 12. Communication skills | ☐ |
| 3. Delegation skills | ☐ | 8. IT/ skills | ☐ | 13. Meeting deadlines | ☐ |
| 4. Creativity | ☐ | 9. Problem-solving & decision-making | ☐ | 14. Team-working & developing others | ☐ |
| 5. Energy, determination and work-rate | ☐ | 10. Steadiness under pressure | ☐ | 15. Personal appearance and image | ☐ |

11. What activities and tasks would you like to focus on during the next year? Also think of development and experiences outside of job skills related to personal aims, fulfilment, passions.

12. Any other issues or workplace concerns?

Is there anyone else you would like to speak to, other than your Appraisal Team? (To be covered separately outside of this appraisal - continue on a separate sheet if necessary).

Any internal concerns:

- If you had any concerns who would you go to?
- About your day to day working environment?
- Do you feel your health and safety and welfare are well looked after?

PART B To be completed during the appraisal by the appraiser

1. Discuss and agree the appraisee's **career direction options** and **wishes**, and **readiness for progression**.

2. Discuss and agree the **skills, capabilities and experience** required for competence in current role, and if appropriate, for readiness to progress to the next role or roles.

3. Discuss and agree the **specific objectives** that will enable the appraisee to reach competence and to meet required performance in current job.

4. Discuss and agree the **training and development** support to be given to help the appraisee meet the agreed objectives above.

Signed and dated by appraisee: and by appraiser:	
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Guidance notes:

- Personal development and support must be offered to all employees, irrespective of age, gender, race, disability, etc., and not just to those seeking promotion
- Development is not restricted to job skills – it includes ‘whole person’. Use your imagination
- Job skills training isn’t restricted to courses. Think about coaching, mentoring (by and of the appraisee), secondment to another role, holiday job cover, shadowing, distance-learning, e-learning, books, videos, attending meetings and workshops, workbooks, manuals and guides, researching, giving presentations; anything relevant, helpful and agreed to help the person develop
- Avoid committing to training expenditure before suitable approval or availability has been confirmed
- Understand development options and procedures before conducting the appraisal. Develop the whole person

The Able Agent Lesson List

ENG | SCO | WAL = Content applies to all three countries

NEW STARTER

ENG SCO WAL	How to Use The Able Agent	ENG SCO WAL	New Starter Induction
	- Welcome to Able Agent - Navigating The Able Agent - Course Curriculum - Your Profile Area - Viewing Course Content - Completing and Reviewing Quizzes - Qualification Overview - Progression after CePAP? - How to Contact Support - Copyright - Important Notice		- Induction introduction - Different services offered by different agents - Membership bodies & Redress Schemes - Who's who - staff - Who's who - clients - Data Protection and your mailing list - Key steps and documentation in letting and selling - Glossary of terms - Property types and terminology

LETTINGS ESSENTIALS

ENG SCO WAL	Negotiating a Let	ENG	Lettings Legislation
	- Negotiating a let - Referencing - Right to rent checks - Guarantors - Letting to tenants with benefits - Letting to tenants with pets - Business generation at referencing - Landlord contact and price reductions - Move in procedures - Additional resources		- Housing Act 1988 - Non-Housing Act tenancies - Understanding Assured Shorthold Tenancy - Landlord obligations - Landlord repair obligations overview - Tenant obligations - Exclusive possession - Property safety overview - Property Safety Gas - Electrical Safety Standards Regulations 2020 - Property Safety - Furniture and Fire regulations - Property Safety - Legionnaires' Disease - Property Safety - Smoke and carbon monoxide - Immigration Act - Right to Rent - Homes Fitness for Human Habitation Act 2018 - Joint and several liability - EPC minimum standards - Housing Health and Safety Rating System HHSRS - Tenant Fee Act 2019 - Client money protection - Deposit Legislation - Housing Act 2004 - Protection from eviction and harassment - Additional resources

The Able Agent Lesson List

ENG | SCO | WAL **Handling Landlords' Enquiries** ☐

- Booking the perfect lettings market appraisal
- Permissions required to let
- Terms of business
- Knowing your landlord type
- Upsell to property management
- Prospecting for new rental property

ENG | SCO | WAL **Handling Tenants' Enquiries** ☐

- Registering tenants on your mailing list
- Categorising your applicant list
- Following up a newly registered applicant
- Generating lettings viewings
- Viewing feedback

ESTATE AGENCY ESSENTIALS

ENG | WAL **Negotiating in Estate Agency** ☐

- Encouraging offers
- Taking offers
- Proof of funds
- Understanding mortgages
- Negotiating a sale
- Multiple offers - informal tenders (best and final)
- Gazumping & Gazundering
- Price reductions
- Vendor contact
- Instruction to exchange overview

ENG | WAL **Estate Agency Legislation** ☐

- Estate Agents Act Overview
- Referral fees
- Additional resources

ENG | SCO | WAL **Handling Vendor Enquiries** ☐

- Booking the perfect market appraisal in sales
- Handling fee enquiries
- Terms of business
- Knowing your vendor type
- Sitting tenants
- Methods of sale - Private treaty
- Understanding Auction
- Methods of sale (Auction)
- Methods of sale (Tender)

ENG | SCO | WAL **Handling Buyers' Enquiries** ☐

- Registering buyers on your mailing list
- How do you categorise your buyer applicant list
- Following up a newly registered sales applicant
- Generating sales viewings
- Viewing feedback
- Cross-selling mortgages
- Cross-selling conveyancing
- Understanding Mortgages

The Able Agent Lesson List

SALES SKILLS AND CUSTOMER SERVICE

ENG SCO WAL	Customer Service		ENG SCO WAL	Sales Skills	
	Meet and greet			Better questions, better data, higher fees	
	Empathy and trust			Features and benefits	
	Mastering phone skills			Overcoming objections	
	Dealing with angry clients			Closing techniques	
	Handling abusive calls			Prospecting power hour	
	Customer Service law overview			Cross selling mortgages	
	Writing a professional email			Cross selling conveyancing / solicitors' services	
				Upselling to property management	
				Guest expert Sales skills with Australian trainer Lee Woodward	
				Additional resources	

ENG SCO WAL	Negotiator Skills		ENG SCO WAL	Preparing for and carrying out the Perfect Viewing	
	The importance of notes			Prepare for the Perfect Viewing	
	Reviews and tasks			Different Viewing Types	
	Hot calling			How to Carry out the Perfect Viewing	
	Applicant management			Security of Property	
	Keeping a pipeline and working to targets			Lone Working	
	Handling portal enquiries			Viewing Feedback	
	Time management				
	How to carry out a perfect viewing				
	Different viewing types				
	Marketing property				
	Security of property				
	Additional resources				

The Able Agent Lesson List

LEGAL COMPLIANCE

ENG SCO WAL	Property Law	☐	ENG SCO WAL	Compliance	☐
	Land law			Consumer Protection Regulations 2008	
	CEAR Act			Consumer Contracts	
	Building regulations			Data Protection Act inc UK GDPR	
	Energy performance certificates			Equality Act 2010	
	Stamp Duty Land Tax			Health and Safety Overview	
	Party Wall Act 1996			Health and safety - Occupiers' Liability Law	
	Town and Country planning and boards			Safety Viewings in New Homes	
	Town and Country planning - Planning permission			Lone working	
	Permitted development/conservation			Consumer Rights Act	
	Occupancy restrictions			Law of Tort	
	Agent of necessity			Business Protection from Misleading Marketing Regulations 2008	
ENG SCO WAL	AML - Anti Money Laundering	☐	ENG SCO WAL	Consumer Protection Regulations & Material Information	☐
	AML Glossary			CPR & Material Information part 1,2 & 3	
	Introduction to Anti Money Laundering			Consumer Protection Regulations Overview	
	The employers' responsibilities			Material Information Overview	
	Assessing risk and due diligence			How to interpret the Material Information Guidance	
	The employees' responsibilities			Material Information in detail	
	Money laundering ID checks			CPRs from Unfair Trading Regulations - Marketing	
	SARs and Tipping Off			Example Scenarios CPRs	
	Politically exposed persons (PEPs)			CPRs and Estate Agent Act Listing Guidance	
	Money Laundering and lettings			CPRs and Estate Agent Act Selling Services	
	So when should you be suspicious?			Gathering the right information	
	Registering Overseas Entities				
ENG SCO WAL	UK Data Protection	☐			
	Data Protection UK GDPR				
	Data Protection in Practice				

The Able Agent Lesson List

PROPERTY MANAGEMENT ENGLAND

ENG	Overview		ENG	Repairs	
	Inventory			Duties of the property manager	
	Documentation after move in			Emergency repairs	
	Check in			Repairs in practice	
	Section 47 and Section 48 Landlord and Tenant Act			Tenant repairs and responsibilities	
	Council tax			Repairs – damp overview	
	Periodic inspection			Condensation	
	Fair wear and tear			Contractors	
	Rent reviews			Asbestos	
	Tenancy renewals			Repairs – listed buildings and conservation areas	
	HMOs (Houses in Multiple Occupation)				
	Selective licensing				
	Town & Country planning – C3 and C4 use Class				
	Dealing with anti social behaviour				
	AST – change of occupant				
ENG	Client Money and Tax		ENG	Ending Tenancies	
	Landlord tax overview			Ending tenancies overview	
	Overseas Landlord tax			Check out	
	Rent arrears			Section 21	
	Rent payment upfront			Section 8	
	Insurances			Serving notices – process	
	Rent payments and Landlord statements			Tenant wants to leave before the end of the tenancy	
	Client money			Deposit Deduction	
				Tenant deposits (also in lettings legislation)	
				Deposit disputes	
				Deposit legislation – non compliance penalties	
				Resource- Section 21 form 6A	
ENG	Non Housing Act Tenancies				
	Non-Housing Act Tenancies				
	Ending Non Housing Act Tenancies				

The Able Agent Lesson List

SALES PROGRESSION

AUCTION

ENG WAL	Sales Progression		ENG SCO WAL	Auction	
	Instruction to exchange overview			Understanding the different types of Auction	
	Sales progression overview			From market appraisal to launch	
	Reservation Agreements			The Modern Method of Auction	
	Memorandum of sale			Marketing	
	Introduction to Progressing the Sale			The Auction Pack	
	Managing the chain after instruction			Vendor contact and setting a reserve	
	Managing a chain – step one			Differences Between Online & In-Room Auction	
	Communicating with solicitors			On the Auction day	
	Progressing Enquiries			The difference between a fee and a deposit	
	Understanding surveys			Spotting opportunities	
	Dealing with a tricky survey			Objection Handling – Auction	
	Problem solving – Down Valuation and retentions			What are ideal properties to enter into Auction?	
	Understanding property searches			Pricing at Auction	
	Problems with Finance			Selling the benefits of Auction	
	Who's Who in Mortgages			Understanding the Disadvantages of Auction	
	Insurance, Warranties and Indemnities			Agreeing the sale at Auction	
	Deed of Variation Process			Legislation at Auction	
	Understanding Title and Land Registry			The Buyer & Seller Friendly Auction	
	Gazumping – taking offers after sale agreed			What happens if the property doesn't sell at Auction?	
	Listed buildings and conservation areas			Sales progression at Auction	
	Selling Leasehold Property			Best Practice Auction Guide	
	Stamp Duty Land Tax			Who is our Guest Expert – I Am Sold	
	Stamp Duty Land Tax Calculator				
	Exchange and Completion				
	Selling opportunities				
	Testimonials, Reviews and New Business				
	What happens after a fall through?				
	Top 5 Sales Progression Tips				
	Progressing Enquiries Scenarios				
	Searches – Scenario Examples				
	Exchange and Completion Day Scenarios				

The Able Agent Lesson List

LISTING AND MARKET APPRAISAL

ENG | SCO | WAL **Prospecting and Preparing for a Market Appraisal** ☐

- Prospecting from your database
- Prospecting for new rental property from your database
- Getting market appraisals from previous valuations
 - Prospecting from other sources overview
- Booking the perfect market appraisal in sales
- Booking the perfect market appraisal in lettings
 - Marketing appraisal preparation overview
 - What makes a good lister?
- The importance of understanding your local market
 - Comparable evidence overview
- Understanding factors that affect property value – Condition
 - Know your competitors

ENG | SCO | WAL **Carrying Out the Perfect Market Appraisal** ☐

- Carry out the perfect sales market appraisal – introduction
 - Advising your Seller
- Presenting price on the market appraisal
 - Presenting different methods of sale
- The Importance of good rental stock
 - Role of admin
- Carry out the perfect lettings market appraisal
 - Assessing rental value
- Lettings market appraisal – presenting your services

ENG | SCO | WAL **Managing Stock and Preventing Withdrawals** ☐

- Preventing Withdrawals
- The Lister/Brand Relationship and Clear Client Service
 - Standards
 - Vendor Contact Overview
 - Introductory Call
 - Vendor Contact 4-Week Review Call
 - Writing a Professional Email
- Know your Property Market Pricing and Amenities
 - Managing Price Adjustments
- Landlord Contact and Price Reductions
- Managing Price adjustments in Lettings
 - Upselling to Property Management

ENG | SCO | WAL

General Lister Skills ☐

- Measuring practice
- Sales skills – building rapport
- Overcoming objections on a market appraisal
- Selling and letting leasehold property
- How to raise fees in sales (features and benefits)
- How to raise fees in lettings & property management
- Closing techniques for listers
- Market appraisal follow up
 - Confirming terms
 - Vendor introductory call
- The lister branch relationship – clear client service standards
- How to prepare for the perfect viewing
- Carrying out the perfect viewing

ENG

Advanced Law for Listers ☐

- Consumer Protection Regulations
 - CPR – Marketing
- CPR and Estate Agent Act listing guidance
- CPRs and Estate Agent Act Selling Services
- Estate Agents Act 1979 Overview
 - Estate Agents Act for listers
 - Example Scenarios CPRs
- Land Law Overview
- Land Law for Listers – Understanding Tenure
 - Easements and Covenants
- Understanding Tenure – Flying Freehold
 - What is a Section 106?
 - New Build Warranties
- Town and Country Planning (Display of Advertisements)
- General Law Overview
 - Lister Negligence and Law of Tort
- Confirming Terms for new property for sale or let
- Contract Law and Ending Contracts
- Agents' Obligations and Common Law Obligations
 - Consumer Contract Regulations
 - Consumer Rights Act

The Able Agent Lesson List

PROPERTY STRUCTURE

ENG | SCO | WAL

Property Structure



Common Issues at Market Appraisal that might affect Sale

Common Issue at Marketing that may affect Letting or

Property Management

Property Types and Terminology

Understanding Property Styles and Ages

Understanding Building Defects on Survey/Listing

Construction Methods

Foundations and Common Defects

A Basic Guide to Cracks

Floors

Roofs and Guttering Overview

Roofs

Guttering

Windows and Doors

Damp and Rot Overview

Gas, Electrics and Water - What to Check on Listing

Japanese Knotweed

Garage Conversions

Lead, Radon and Shale

The Able Agent Scotland Lesson List

LETTINGS (SCOTLAND COURSES)

SCO Lettings Legislation



The Letting Agent Code of Practice overview

Housing act Scotland Overview

Understanding Private Residential Tenancy

Understanding Short Assured Tenancy

Introduction to Private Housing

The nine Statutory terms

Landlord Repair Responsibilities

Landlord Obligations Overview

The Repairing Standard

The Tolerable Standard

Tenant's Responsibilities

LARN

Communication

SCO Property Safety



Property Safety Overview

Property Safety - Gas

Electrical Safety

Fire and Carbon Monoxide Safety in properties

The Furniture and Furnishing (Fire) (Safety) Regulation 1988

Legionnaires' Disease

Tenant Fees

Deposit Legislation - Tenancy Deposit Schemes Scotland 2001

Protection from Eviction and Harassment

The Able Agent Scotland Lesson List

PROPERTY MANAGEMENT (SCOTLAND COURSES)

SCO Property Management ☐

Inventory
Documentation Connected to Move In
Landlord's Name and Address
Check In
Council Tax
Periodic Inspection
Fair Wear and Tear
Scotland Rent and Rent Increases
Scotland Rent Pressure Zones
Scotland Houses in Multiple Occupation
Dealing with Breaches of Tenancy
First Tier Tribunal

SCO Repairs ☐

Duties of a Property Manager
Landlord Repairs Responsibilities
Landlord Repairs and Practice
The Repairing Standard
The Tolerable Standard
Repairing Standards Enforcement
Tenant Repair Responsibilities
Repairs in Practice - Access
Damp Overview
Condensation
Contractors
Asbestos
Listed Buildings and Conservation Areas
Carbon Monoxide Detectors
Understanding an EICR Report

SCO Ending Tenancies ☐

Ending Tenancies Overview
Ending a Short Assured Tenancy - Landlord
Ending a Short Assured Tenancy - Tenant
Tenant Dies during Tenancy
Ending the PRT Tenancy - Landlord
Grounds for Possession - PRT
Ending the PRT Tenancy - Tenant
Serving Notices
Getting an Eviction Order
Check Out
Unlawful Eviction
Wrongful Termination Orders
Tenant Deposits Legislation Overview
Deposit Deductions
Deposit Disputes
Deposit Legislation
Abandonment
Abandoned Possessions

SCO Client Money & Tax ☐

Landlord Tax Overview
Overseas Landlord Tax
Rent Arrears
Handling Landlord and Tenant's Money and Insurance
Insurances
Rent Payment PRT and Landlord Statements
Client Money (Accounts etc)

The Able Agent Wales Lesson List

LETTINGS (WALES COURSES)

WAL Lettings Legislation



Introduction to the Renting Homes (Wales) Act 2016

Rent Smart Wales Overview

Occupation Contracts

Terms

Varying Rent and Other Contract Changes

New Join Contract Holders and Consent

Sub-Lets and Trespassers

Renting Homes (Fees etc.) (Wales) Act 2019

Deposits under The Renting Homes (Wales) Act 2016

Client Money Protection Wales

Ending Contracts Overview

Non Renting Homes Wales Act Tenancies

Protection from Eviction and Harassment

Property Safety and EPC Minimum Standards

Property Conditions - Repair Obligations

Access for Repair

Housing Health and Safety Rating System - HHSRS

Fitness for Human Habitation - Part 4 of the Renting Homes (Wales) Act 2016

Property Safety Overview

Property Safety Gas

Property Safety Smoke and Carbon Monoxide

Electrical Safety Standards - Renting Homes (Wales) Act

Significant Hazards - Electrical Safety

Property Safety Furniture and Fire Regulations & Fire Safety (Wales)

Property Safety Legionnaires' Disease

EPC Minimum Standards

The Able Agent Wales Lesson List

PROPERTY MANAGEMENT (WALES COURSES)

WAL Property Management ☐

Property Management Overview
Inventory
Documentation after Move In – Wales
Check In
Vulnerable Tenants
Council Tax
Periodic Inspections
Fair Wear and Tear
HMOs (Houses in Multiple Occupation)
Selective Licensing
Town and Country Planning – C3 & C4 Use Class
Dealing with Anti Social Behaviour
Quiet Enjoyment
Breach of Contract

WAL Repairs ☐

Repairs
Duties of a Property Manager
Emergency Repairs
Repairs and Practice
Repairs – Damp Overview
Condensation
Contractors
Asbestos
Repairs – Listed Buildings and Conservation Areas
Part P of the Building Regulations England and Wales

WAL Ending Tenancies ☐

Check Out
Deposit Deductions
Deposit Disputes
Deposit Legislation – Non Compliance Penalties
Death and Succession
Termination of Fixed-term Occupation Contracts
Termination of Periodic Contract
Serving Notice – Process
Possession Orders
Abandonment
Retaliatory Eviction
Joint Contract Holder wants to Leave
Protection from Eviction

WAL Client Money & Tax ☐

Client Money & Tax
Landlord Tax Overview
Overseas Landlord Tax
Rent Arrears
Insurances
Rent Payments and Landlord Statements
Client Money Protection Wales

Qualifications England

All our courses can lead directly to nationally recognised, Ofqual regulated qualifications.



Level 3 CePAP
Certificate in Property
Advice and Practice



Level 3 CeLAP
Certificate in Lettings
Advice and Practice



Level 3 CeLMA
Certificate in Listing &
Market Appraisal



Level 3 CeSP
Certificate in Sales
Progression



Level 3 DipPAP
Diploma in Property
Advice and Practice



Level 3 CePM
Certificate in Property
Management



Apprenticeships
Level 3 CePAP and Business
Administration



Level 3 CeAM
Certificate in Agency
Management

An Employer's guide to apprenticeships

The Able Agent/ITEC NE property apprenticeship has been developed in response to industry needs, in line with current recruitment and property markets.

- ▶ The Property apprenticeship provides structured property and business focused training to ensure employees emerge as compliant, effective sales people.
- ▶ By following the Able Agent program alongside a Business Admin Level 3 qualification, trainees will gain a fuller understanding of the property industry to enable them to become productive staff members as early as possible.
- ▶ This apprenticeship provides a unique skill set to your employee, with Google classroom support in all areas of Business Administration from ITEC NE and property specific training from The Able Agent.
- ▶ By combining with The Able Agent platform your apprentice will be fast tracked in specific law and sales skills and able to carry out their role with confidence.
- ▶ This combined approach is aimed at retaining and developing staff of all levels in the workplace.

About the Able Agent

The Able Agent® is the easy, convenient and affordable training platform for sales and letting agents. Learn at your own pace, with over 30 courses.

And when you're ready, qualify with CePAP (L3 Certificate in Property Advice & Practice) or CeLAP (L3 Certificate in Lettings Advice & Practice) with us too.

About the ITEC North East

ITEC North East have been in business for 40 years this year, they pride themselves on delivering educational excellence through a portfolio of vocational apprenticeships across several occupational sectors. They are a non-profit inspiring and independent training provider with a registered charitable status.



Why Invest in an Apprenticeship?



We find that agents involved in recruitment often find their own quality candidates and we can support enrolment.

- Create compliant confident property sales people
- Aid recruitment and retention of team members
- Tailor an apprentice to a specific role, and support any job role changes
- Upskill your current employees and enable career progression
- Develop skilled workers you need for the future

What is an apprentice?

- Typically the apprentice badge (when helping someone start out in their career) is 16–24 year olds, BUT anyone in your business of any age and any job role can benefit.
- Apprenticeships allow existing staff to up-skill and new starters to learn new skills
- Apprenticeships allow a mix of on the job training and traditional learning and development



When is a good time to recruit an apprentice?

- The best time to recruit is when you have a full team and add in the additional apprentice!
- You may already have someone in the workplace that would benefit
- If you are filling a vacancy, you need to ensure training is part of the recruitment process. This apprenticeship will offer you that support.



APPRENTICE RECRUITMENT PROCESS

- 1 Understanding your business is key to delivering you the most suitable candidates, your Employer Recruitment Consultant will work with you to ensure your requirements are met.
- 2 A job description will be created for the role, once approved candidates can be sourced
- 3 CV's are collated and screened, with suitable candidates undertaking a pre-interview assessment to see if they are suitable for your organisation
- 4 You only interview candidates who have passed the thorough quality assessment process
- 5 You make the final decision on the candidate



How much do you pay for an apprentice?

SMALL AND MEDIUM EMPLOYERS (NON-LEVY)

Levy payer Apprenticeship is funded if you have a **higher band of £3 million a year in salaries**

Those with an annual wage bill of less than £3m do not pay the Apprenticeship Levy.

Instead, 95% of each apprenticeship is funded by the government whilst a 5% investment is required by the employer to enhance the skills of their employee. (£250.00 paid by the employer after 30 days)

- Employers are also be eligible for a £1000 incentive payment if the apprentice is aged 16 – 18.
- Employers with less than 50 employees and where the apprentice is aged 16 – 18, the government will fund 100% of the apprentice and are eligible for a £1000 incentive payment.
- Employers with those aged 19+ the government will continue to fund 95% of the apprenticeship programme whilst a 5% investment is required by the employer. (as above)

Businesses can manage this through the Digital Apprenticeship Service DAS online account

Agency management training program

aligned to Level 3 CERTIFICATE IN AGENCY MANAGEMENT

£250+VAT PER PERSON for Able Agent access

+ £295+vat for the qualification exam and certification

Principles of Management & Leadership ☐

Introduction to the Role of Manager

Qualities of a Good Manager

What are Daily Tasks of a Manager?

Features of Good Management

Leadership Vs Management

Understand the Application of Management

Leadership approaches

Features of Good Management & what makes a Good Manager

Leadership Styles are like Flavours of Ice Cream

5 Top Tips to Help You Excel

Mastering Daily Activities for Managerial Success

6 Reasons your Team Hates You

Being A Good Managers

Leaders Lead by Example

Ethics & Their Importance ☐

What is Meant by Ethical Practice

How can you meet Ethical Objectives

What is a Fit & Proper Person Test

Making Ethical Decisions

Why Ethics can Lead to High Standards

Managing the Team ☐

Getting to Know your Team

Honey & Mumford Learning Styles

Managing Team Dynamics

Psychological Safety

Managing a Team

Managing Change

Meetings

Stages of Team Development

Wellbeing for Managers

Equity, Equality & Diversity

Understand your Role in Supporting your Team

Managing Individuals ☐

How can a Manager Support Individuals to Perform Well

How to Monitor Performance of Individuals

Understand the Differences Between Skill & Will

Disciplining

Implementing more Formal Disciplinary Procedures

Handling Grievance

Help your Staff Cope with Your New Role

Performance Reviews

Staff Appraisal

Dealing with Conflict

Grievance Procedures

The Able Agent management Lesson List

Managing Legal Compliance ☐

Why does Legal Compliance Improve Business Practice
CPR & EA Act Selling Services
Consumer Protection Regulations
Managers Role Monitoring Legal Compliance
Business Protection from Misleading Marketing Regulations

General Law ☐

Overview
Contract Law & Ending Contracts
Managers Negligence & Law of Tort
Equality Act as an Employer
Health & Safety Legislation

AML ☐

AML Glossary
Introduction to Anti Money Laundering
The employers' responsibilities
Assessing risk and due diligence
The employees' responsibilities
Money laundering ID checks
SARs and Tipping Off
Politically exposed persons (PEPs)
Money Laundering and lettings
So when should you be suspicious?
Registering Overseas Entities

Consumer Protection Regulations ☐

CPRs & Material Information part 1,2 & 3
Consumer Protection Regulations Overview
Material Information Overview
How to interpret the Material Information Guidance
Material Information in detail
CPRs from Unfair Trading Regulations - Marketing
Example Scenarios CPRs
CPRs and Estate Agent Act Listing Guidance
CPRs and Estate Agent Act Selling Services
Gathering the right information

Data Protection ☐

Data Protection UK GDPR
Data Protection in Practice

Property Law ☐

Land law
CEAR Act
Building regulations
Energy performance certificates
Stamp Duty Land Tax
Party Wall Act 1996
Town and Country planning and boards
Town and Country planning - Planning permission
Permitted development/conservation
Occupancy restrictions
Agent of necessity

The Able Agent management Lesson List

Managing Customer Service ☐

- Customer Service Starts with Communication
 - Cause of Complaints
- The Importance of a Complaints Policy
 - Complaint Handling
- Turning Complaints into Positive Reviews

Skills for Business Performance & Personal Development ☐

- Planning & Prioritising
 - Setting SMART Goals
 - Delivery of SMART Goals
 - Procrastination
- How to Overcome Procrastination
 - EAT THE FROG
- Time Management
 - The Pomodoro Technique
- Benefits of Coaching
 - Delegation
 - Decision Making
 - Problem Solving
 - Data & Marketing

Managing Budgets, Data & Resources ☐

- Maximising Performance with KPIs
- How to Manage Budgets to Achieve Targets
 - Understanding a P&L
 - Budgeting
 - SWOT for Business
- Data Protection Overview
- Data Protection For Business Owners
 - Data & Marketing
 - Prospecting
- How to Use Social Media for Business
- The Importance of Keeping Business Records
 - Auditing Your Business

Managing HR & Relevant Legislation ☐

- Understand the Process of Recruitment, Employment & Termination
 - Understand and Apply the Principles of Strategic HR
 - Evaluate the Benefits of HR Planning

Contact us to discuss your training needs

GENERAL ENQUIRIES

enquiries@theableagent.co.uk

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VAT Registration 347089475

DipPAP
Level 3 Diploma in Property Advice and Practice

CeLAP
Level 3 Certificate in Lettings Advice and Practice

CePAP
Level 3 Certificate in Property Advice and Practice