

STANDARD OPERATING PROCEDURES FOR: _____

- Instructions for use:
1. This Record of Competence (ROC) or standard operating procedures tracks the successful completion of the essential job functions for Relocation Manager.
 2. The Coach and the SOJT associate review the ROC at the beginning of the SOJT period and throughout the SOJT process.
 3. As the SOJT associate successfully completes each essential job function listed, the Coach initials and dates each box.
 4. This ROC will be electronically filed, stored and controlled in Knowledge Planet™.

Authorized Coaches:
Please print name and sample initial:

Name _____
IN _____

Name _____
IN _____

Name _____
IN _____

Name _____
IN _____

TASK CATEGORIES	COMMENTS
<ol style="list-style-type: none"> 1. Manage marketing assistance process 2. Manage appraisal/inspection process 3. Manage AV/MVD sale process 4. Manage inventory process 5. Manage closing process 6. Manage insurance claims 	<p>Each of these task categories represents major tasks that the _____ performs to support customer _____. Each skill box that has been initialed by an authorized Coach indicates achievement of competence of that skill or behavior.</p>

Category	1. Manage Marketing Assistance Process	Date	Coach's Initials
Task	1.1. Determine listing brokers for referral (Vision)		
Primary & Secondary Steps	1.1.1 Identify listing brokers for referral 1.1.2 Place listing referral calls to brokers and direct RA to send Referral Package to Relocation Director 1.1.3 Enter brokers into HF HAS screens 1.1.4 Enter KOT Notes 1.1.5 Identify DNU/no Brokers/limited Brokers 1.1.5.1 Contact <u>local</u> Broker Network Management		
Task	1.2. Administer Marketing Analyses		
Primary & Secondary Steps	1.2.1. Review Marketing Analyses for inconsistencies in broker information 1.2.2. Identify incurable defects and marketing strategies 1.2.3. Determine requirements for further action 1.2.3.1 Recommend solutions 1.2.3.2 Enter summary in OMS and let RM know information is available 1.2.4. Direct Broker to make listing presentations (if 2-step process)		
Task	1.3. List the property		
Primary & Secondary Steps	1.3.1. Contact listing and non-listing agents 1.3.2. Prepare Prudential Relocation Rider 1.3.3. Direct RA to send Marketing Assistance Package to listing agent/Relocation Director 1.3.3.1 Obtain listing agreement with exclusion clause, if already listed 1.3.4 Verify that customer's listing agreement meets client and Vision requirements		
Task	1.4. Complete marketing actions of the listing agent		
Primary & Secondary Steps	1.4.1 Provide marketing assistance to customer/RM		
	Additional Comments:		