



# NEW/AE ORIENTATION

## *Practical Tips for Today, Leadership Strategies for Tomorrow*

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# **Part 1: What I wish someone told me when I was a new AE**

*PRACTICAL TIPS AND TOOLS FOR  
RIGHT NOW!*

# Understand Your Association Culture

- *Culture: shared identity and beliefs about your purpose and why you exist*
- *Talk to staff, leadership, other AEs and industry leaders*
- *Conduct field visits (Broker offices, “day in the life”, Associations)*
- *Gain understanding with surveys and focus groups*
- *Role clarity*

# Policies are your friend

- *Policies are formalized culture statement*
- *Align bylaws and policy manual*
- *Strategic and business plans*
- *Become familiar with governing documents (local, state, NAR, COE)*

# Figure out your value proposition

- *WIIFM:*
  - *Help me make more money, do more deals*
  - *Represent my interests on issues critical to my business*
  - *Make things easier for me*
- *Value is a moving target*
- *Do your core services fill the need? (education, advocacy, information, products and services, networking)*
- *The great differentiator – consistent, high quality world class customer experience*

# Work smarter, not harder

- *Gather and analyze information / data*
- *Utilize systems to make your job easier and more effective*
- *Leverage resources through collaboration (other AEs are your friends!)*

# Finances are essential

- *Protect and manage resources*
- *Annual audit or review*
- *Transparent financials*
- *Diversify revenues*

# Go social, go mobile

- *Utilize social media (meet members where they are)*
- *Website design, experience, content*
- *Email still #1 but embrace text and other ways to communicate*



# Embrace younger members

- *Your future leadership*
- *Train them to be leaders*
- *Give them real responsibilities*
- *Realize they do things differently and embrace it*

# Volunteer Leadership

- *The backbone of your organization*
- *BOD Culture; board orientation*
- *You won't always agree; Be flexible*
- *BOD self-assessment*
- *Identify new leaders*

# Great staff

- *Learn HR basics*
- *Hire the best (hire slow, fire fast)*
- *Learn to delegate*
- *Train, pay and mentor*
- *Performance evaluations and development*

# It's okay to be overwhelmed

- *Tell your leadership*
- *Ask for help*
- *Talk to a mentor*
- *Keep things in balance*

# Learn the industry

- *Industry updates*
- *Training through local resources*
- *AE Institute*
- *Find mentors*

# Member are watching you

- *Be a volunteer*
- *Practice what you preach*
  - *Be prepared; show up on time*
  - *Pay attention*
  - *Keep confidential matters confidential and disclose conflicts of interest*
- *Members are watching you*
- *Association events, social events, online (social media)*
- *Be Ethical, truthful (oh yeah, don't steal!)*

# Expect the unexpected

- *Bad things happen to good people*
- *Stay calm*
- *Marshall your resources*
- *Every day is a potential press conference*

# Part 2: 10 Step Leadership Formula for AE Success

*LONG TERM STRATEGIES TO BUILD  
YOUR CAREER*

FRIDAY, OCTOBER 22 @ 2:00 PM EASTERN -  
ZOOM

Register in advance (*link in the chat*)

<https://us02web.zoom.us/j/83918669088?pwd=RXk1dWV5ekdrY0pkQklCeU81VWMzdz09>





# THANK YOU.

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