

# REALTOR® AE

NAR.REALTOR/RAE

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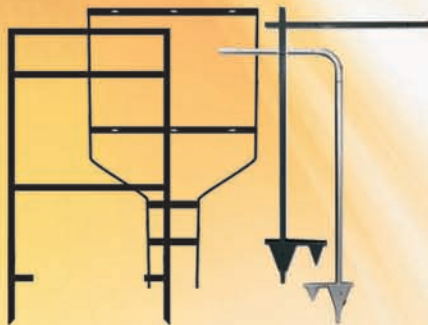
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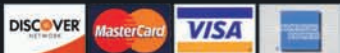
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Spring 2017

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To join the editorial board, write an article, or contribute information, email Carolyn Schwaar, editor, REALTOR® AE magazine, [cschwaar@realtors.org](mailto:cschwaar@realtors.org).



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# Become an Inspiring Leader



**Michael Theo, RCE, CAE,**  
CEO, Wisconsin  
REALTORS® Association,  
2017 chair of the  
AE Committee

I've been thinking a lot lately about leadership, perhaps because I was so motivated by one of the best-ever Association Executives Institutes, held this year in Denver. (A huge congratulations and thank you again to 2017's AEI Chair Laura Crowthers and the entire 2017 AEI Advisory Board.)

Perhaps leadership is on my mind because 2017 is the "farewell tour" of Dale Stinton, NAR's longtime CEO, who will retire this year after 36 years with our organization. Dale leaves in his wake a seemingly endless list of managerial innovations, but most important is that he embodies the qualities of pure leadership. It's hard to define or quantify leadership, but when you see it, you know it—and that's Dale.

It is a good time for all AEs to take inventory of our own leadership qualities, identify what we consider important leadership skills, and reflect on what we need to improve. This introspection will come not

from any performance review or strategic planning session but from you alone.

There are many definitions of leadership; most involve the ability to establish a clear vision and then inform and motivate others in pursuit of that vision. Leadership is not easily attained or maintained.

As REALTOR® AEs, our role also means sharing leadership. Clearly identifying the separate but intertwined roles and responsibilities between us and the REALTOR® leaders of our associations is critical. Leading while being led is also not easily attained or maintained.



NAR CEO Dale Stinton at the 2017 AE Institute, Denver.

So what's my point? The one commodity we all lack is time. But being an effective leader of your staff and organization requires more "think time" than most of us probably allot for ourselves. Think time

is the time to take inventory of your skills, reflect on the qualities of leadership you have or lack, and identify ways to develop the knowledge and skills you need.

So where can you find help to improve your leadership skills? Just look around the room next time you're at an AE meeting. Or reach out to those colleagues who have accomplished goals to which you aspire. Our greatest resource is one another.

The part of leadership I find most fascinating is the element of inspiring others. Inspiration includes elements of vision, motivation, encouragement, and inventiveness. I was truly inspired by many presentations at AEI and I'm continually inspired by Dale anytime I'm around him. But I was also inspired by all of you in the hundreds of conversations I had in Denver. I've always learned more from my AE colleagues than I ever imparted. The mentors you seek are likely hiding in plain sight.

Becoming a better leader should be a personal goal and an organizational goal, as well. The benefits of becoming a more effective leader will accrue not only to you but also to your association. You have the title Association Executive. Now make the most of it!



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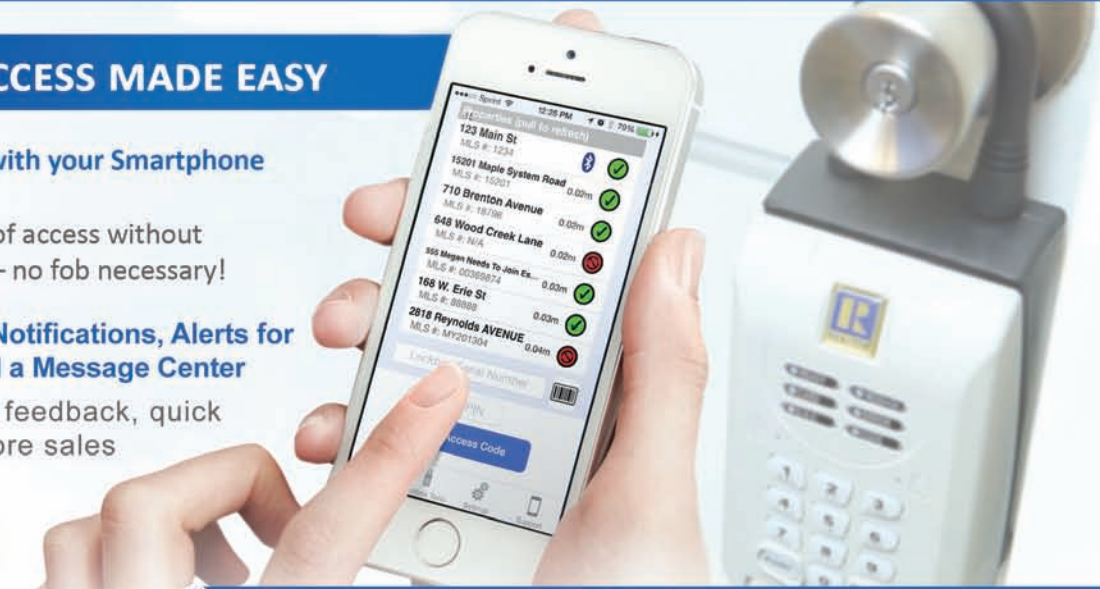
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# Update on Upstream: MLSs Take a Seat at the Table

Alex Lange has spent months crisscrossing the country to explain Upstream—the broker initiative to harness and optimize listing data—to MLSs, associations, and brokers. But if you missed the Upstream CEO’s presentations or monthly webinars, here’s a snapshot of where the project is today and what it aims to accomplish.

Upstream is a simple, streamlined platform where brokers enter, manage, store, and distribute listings and other data. The impetus and driving philosophy is that listing data belongs to the broker and that in recent years, portals, syndicators, and even online data pirates have weakened brokers’ ability to control and monetize that data.

The core message to AEs, he said, is that the brokerages themselves are saying they are the fiduciaries of their listing data—the only people who have any legal liability if something were to go wrong—and so they want to be more intentional about how that data is being used.

However, MLS and portal technology has come a long way toward managing and protecting data with no national standards among the hundreds of MLSs.

“I’m still surprised by how many people think Upstream is an attempt to create a national MLS. It’s not,” says Lange. “NAR

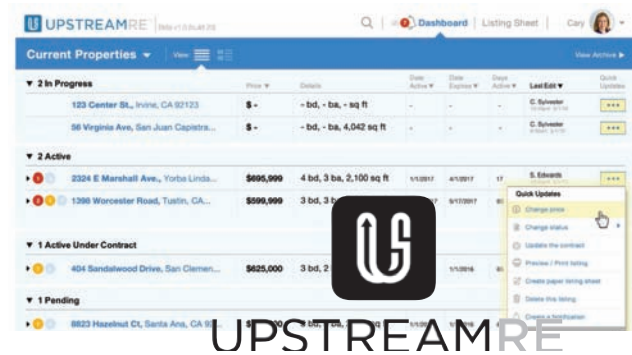
is helping fund the effort because its dues-paying members really want this, and if NAR didn’t build it, someone else would.”

Upstream is 100 percent owned by its broker members. NAR is paying \$12 million over two years to fund construction of the Advanced Multi-list Platform, Upstream’s data entry and distribution technology, but NAR does not have control of Upstream or its products. AMP is a product of REALTORS® Property Resource, which is owned by NAR.

## What Upstream Does

The way the system is configured, a broker enters listing data into Upstream, which is the single point of entry for the data. “The broker could have an agreement with realtor.com® allowing that portal to pull its data or parts of its data from Upstream. Same with Zillow, a homes magazine, and on and on,” says Lange. “The broker says who gets what and when. Even the franchisor is downstream from the broker.”

Originally the plan was that MLSs would pull data from Upstream. But in April, the Upstream board voted to allow a change that is significant to the MLS community, says Lange. “We will work with RESO and the MLS



community to allow a two-way sync between Upstream and the MLS, instead of the MLS pulling data from Upstream.” Rules regarding which system update overwrites others are still being written. (Attend a live demo at the NAR Legislative Conference & Expo at the Upstream booth.)

The MLS maintains the practitioner-to-practitioner cooperation and compensation systems, VOWs, and IDX. “But when it comes to sending listing data outside of that system to third parties, whether it’s a marketing vendor or even their own internal accounting system or listing portal, brokers say they want to be deliberate about how that data is being used,” Lange explains.

Unlike most MLSs, Upstream will allow brokers to control what data goes to which vendors, when, and how. For example, a broker’s print postcard vendor doesn’t need a full 200-field data feed, but it does need the high-resolution photos that don’t have a watermark. Brokers can uniquely watermark each photo depending on where that photo is distributed. This enables brokers to better hold vendors accountable for data leaks and misuse. Upstream also enables brokers to set the timing of data distribution if, for example, they want their franchise portal to get listings 12 hours before Zillow.

Other industry products (from portals, brokerages, MLSs, and software vendors) have emerged recently to compete with Upstream. “Every entity creating their personal Upstream is fighting to obtain a significant critical mass of data to ensure they become



the standard for data management and control,” Lange wrote recently on the Upstream blog. But “ask yourself: Who is most likely to have the best interest of the brokers and sales associates at heart?”

Retsly and Bridge Interactive from Zillow, feature by feature, feel very similar to Upstream, but they put the MLS, not the broker, in control of the data, Lange says. “There’s no granularity on those platforms for the broker.” For example, a broker can’t determine on a listing-by-listing basis where the data goes, and there’s no control over the timing.

“We launched a new MLS advisory board and some of our best ideas have come from them.”

—Alex Lange, CEO, Upstream

Many new developments and those on the drawing board for Upstream have come from cooperating MLSs, says Lange. “We launched a new MLS advisory board and some of our best ideas have come from them,” he says. To better align with MLSs and give them a seat at the board, Upstream’s directors will vote on creating an MLS member category.

“The original founding brokerages took the stand that they were going to do this with or without the MLS community, but have since evolved to understand that we all need to work together,” says Lange. “We’re no threat to the MLSs. Our charter is to never compete with MLSs in any way.”

Five MLSs, sixteen brokerage firms, and a host of REALTOR® associations are coordinating Upstream’s pilot program beta testing.

REALTOR® AE magazine will have regular updates on Upstream. If you have questions you’d like us to pose to Upstream, send them to [cschwaar@realtors.org](mailto:cschwaar@realtors.org).



## Small Association Welcomes TV Series Focused on Local Housing

A new TV series focusing on a couple determined to rescue old houses and make a big difference in a tiny Southern town has transformed the Mississippi town of Laurel.

Although organizations of volunteers came together a decade ago and started the collective effort of rebranding, reimagining, and revitalizing the town by drawing on its historic past, the HGTV series “Home Town” supercharged the area’s urban renewal.

“Practically every abandoned building has been restored and repurposed,” says Cheryl Jordan, AE of the Laurel Board of REALTORS®. The once-sleepy streets of downtown are alive and bustling, and loft apartments downtown are at 100 percent occupancy.

Jordan says her association website hits have tripled to 90,000 a month since the pilot of “Home Town” aired last year. “With interest in our market building since the series premiere in March of 2017, our membership has grown from 98 to nearly 120,” she says.

Ten new episodes airing in 2017 will no doubt bring recognition, tourists, and revenue to the area. “Speculation is about to become reality in our small town,” says Jordan. “One thing is certain: The Laurel Board of REALTORS® is eager to represent itself as an organization of educated, fair, and enthusiastic professionals on the forefront of something rarely seen in a town so small.”

## Spokane REALTORS® Host Drone Conference



The Spokane Association of REALTORS® hosted the first enterprise drone conference in the Pacific Northwest in March at the Spokane Convention Center. Commercial-use drones became legal last year. The one-day conference focused on understanding drone applications, operations, safety, legality, and potential. JD Claridge, CEO and cofounder of drone manufacturer xCraft, was the keynote speaker. Tickets sold for \$150. The event, which was open to the public, received additional sponsorship from the Washington REALTORS®, and volunteer support from the local chapters of the Young Professionals Network and Women’s Council of REALTORS®.



## REALTOR® Associations Honored for Outstanding Community Outreach

During the March 2017 Association Executives Institute in Denver, the National Association of REALTORS® honored six REALTOR® associations with Community Outreach Awards for their work to make their communities a better place to live and do business.

Each association made use of REALTOR® Party Community Outreach resources over the last two years to address a local challenge, develop partnerships with community stakeholders, or involve the public in a project or discussion to improve the community.

### Greater Rochester Association of



**REALTORS®**, N.Y., used an NAR Housing Opportunity grant to hold a successful housing fair called Celebrate City Living (*pictured above*), which attracted 500 people. The association also used four NAR Smart Growth grants to sponsor a lecture series on equity in planning and hold a symposium for community design professionals on planning and transportation.

**Cape Fear REALTORS®**, N.C., launched two NAR Land Use Initiatives to defeat a proposed vacation rental ordinance in Kure Beach and to work with elected officials to modify a zoning change for group homes in New Hanover County. The association also received two NAR Placemaking grants to build community gardens and an NAR Smart Growth grant to hold a seminar for 165 people and bring together several community groups to discuss water issues.

### Austin Board of REALTORS® in Texas

used an NAR Diversity Initiative Grant to host a two-day conference focusing on the National Association of Real Estate Brokers' State of Housing in Black America report.

The board also received NAR Housing Opportunity grants to connect homeless veterans to permanent housing, hold an event about the community's need for small homes and townhouses, host housing fairs, and host a forum to explore the connection between housing and health. The board also took advantage of an NAR Smart Growth grant to fund a community workshop about a large development that many neighbors opposed. The workshop helped the city, developers, and neighbors reach consensus.

**Richmond Association of REALTORS®**, Va., received an NAR Housing Opportunity grant to support Project Homeless Connect (*pictured below*), an event that connects volunteers and service providers with homeless people. NAR Housing Opportunity grants were also used to educate the public on the connection between housing supply and economic prosperity and for seminars on community land trusts. The association also held two vacant-property trainings supported by NAR's Housing Opportunity Program, and invited Richmond public officials, city staff, property owners, and



housing advocates to learn about the effect that vacant properties have on communities and real estate values, and the techniques that can be used to turn these properties



into community assets.

**Bronx-Manhattan North Association of REALTORS®**, N.Y., partnered with the local Bronx Community Board 9 on a public arts project in which local artists created a mural (*pictured above*) celebrating notable people from the Bronx, from hip-hop pioneers to Supreme Court Justice Sonia Sotomayor. The mural has contributed to the success of a new pedestrian plaza adjacent to a rail transit station. Taking advantage of several NAR Smart Growth grants, the association worked with Bronx Community Board 9 to undertake long-term planning activities to change local land use and zoning.

**Coastal Carolinas Association of REALTORS®**, S.C., applied an NAR Placemaking grant to build a playground and received an NAR Smart Growth grant to support a community planning analysis by the Urban Land Institute. The association is also using an NAR Smart Growth grant to host a national expert in walkability who carried out a "walk audit" to observe and analyze the Myrtle Beach community and to make a major commercial artery more safe and welcoming for pedestrians.

For more, visit [realtoractioncenter.com/community-outreach](http://realtoractioncenter.com/community-outreach).

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## Top Reasons REALTORS® Call Their Technology Helpline

REALTORS® want to spend their time selling homes, not updating their software or removing viruses from their computers. That's the overwhelmingly reason they turn to tech helplines provided by their REALTOR® associations for help.

So what's the biggest technology issue facing REALTORS® today? Slow computers. This vague yet often complex issue is the number one complaint to the Tech Helpline, a member service launched by Florida REALTORS® 10 years ago that has since expanded across the U.S. and Canada. (It's estimated that 60 percent of REALTORS® have access to Tech Helpline as a state or local membership benefit.)

"Slow computers waste agents' time. Often, the best solution is upgrading to a new computer or smartphone, but agents are hesitant because of the setup time," says Tricia Stamper, director of technology with Florida REALTORS®.

The reason members' computers run slowly is typically poor maintenance habits. And although Tech Helpline staff members offer sound advice about defragmenting the hard disk and scanning for system file errors, most callers opt to have the techies access their systems remotely and fix the problems, says Stamper.

The second most common reason REALTORS® call Tech Helpline is viruses, malware, or adware, usually resulting in lost data. Often,



callers can't even get their systems to boot, says Stamper, and they fear they've lost years of contacts and data. "But data recovery from corrupt hard drives is possible and Tech Helpline staffers also take this opportunity to teach members about good data backup habits and cloud storage," she says.

The third most common issue is printer problems. "When your printer malfunctions, it can be more than frustrating," says Stamper. "It can delay a transaction or a contract signing." The most common fix is an updated driver or driver conflict, she says.

Tech Helpline—which reports that calls were up 15 percent last year from the previous year—keeps a handy blog with quick-fix advice at [techhelpline.com/blog](http://techhelpline.com/blog).

### ADVOCACY starts with YOU and your MEMBERS

You're a member of the REALTOR® Party—the only advocacy group in America that fights exclusively for homeownership, real estate investment, strong communities and the free enterprise system. Here are six easy ways to get started.

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Our goal is to have as many of our members registered and at their polling place on Election Day as possible	Text <b>REALTOR</b> to <b>30644</b> to have national and state calls for action sent directly to your phone	Follow the REALTOR® Party on Facebook and Twitter. Use #REALTORParty in your posts.	Stay tuned to <a href="http://www.realtoractioncenter.com">www.realtoractioncenter.com</a> for the latest news and information	The REALTOR® Party News newsletter is sent the 2nd Thursday of the month	Learn who your elected officials are and where they stand on real estate issues

[www.realtoractioncenter.com](http://www.realtoractioncenter.com)

# The Multichannel Mix



There have never been more tools and strategies to use to communicate with members, and next year there will be more. How do you figure out what's worth your time? Is the multichannel approach to communications your best bet for reaching the most members, or is it a waste of resources? Here we take a look at the top communication channels (and some up-in-coming ones) and how they may apply to your association outreach.

## Print

Paper magazines, newsletters, and marketing materials are the most time and labor intensive to produce, but don't discount

their effectiveness in the digital age, especially when combined with a complimentary online component. Your older members may still prefer the tactile experience

of a print magazine, which remains popular with B2B advertisers and is a good source of nondues revenue.

**Member reach: high**

## Email

Although the media is full of reports that email is dead, or dying, in a sea of other social platforms, most REALTOR® associations rank email as the number one way to reach members with news and information.

**Tip:** Although email can be free, e-newsletter products such as ConstantContact, Emma, and MailChimp offer better-looking communications that are more likely to be opened and are mobile-friendly. Plus, their delivery services usually mean a lower percentage of messages are tagged as spam.

**Trend:** Short three-word subject lines (more easily read on mobile devices) have the highest engagement rates.

**Member reach: high**

## Text Message

With a read rate of 98%, text messages are a tempting member communication channel. However, members must opt in and are likely to opt out if texted too frequently. Today, associations use the texting option mostly for advocacy calls to action.

**Member reach: high**

## Website

Recently relaunched association websites have a few key elements in common: a focus on simplicity, a mobile-friendly design, and a robust search feature. Efforts to streamline and eliminate the need for frequent updates are the trend as associations invest more time into social media. Associations also are adding features that ensure their websites comply with the Americans with Disability Act, including easily resizable text, captions for photos, and audio descriptions and transcripts of videos.

**Member reach: high**

## LinkedIn

The recently redesigned LinkedIn (which focuses more on news feeds and social sharing) creates a better opportunity for associations to publish news and updates to their followers, and encourage sharing among members. Advertising, often used for advocacy efforts, can target users with specific titles in narrow locations.

**Tip:** Association-sponsored groups facilitate discussion and provide a free platform for disseminating news and information. Many associations enlist members to monitor these groups, which can focus on the local market or have a commercial or international theme.

**Member reach: medium**

## Twitter

Although hundreds of REALTOR® associations maintain Twitter accounts with large followings, a close look at tweets shows links to Facebook and blog posts. This suggests that Twitter is one of

many platforms where associations' news is automatically posted with tools such as HootSuite that enable one-click posting to multiple outlets. Social media management tools are a must for associations with multimedia communication

strategies.

**Tip:** Hashtags double the engagement of tweets. Twitter is becoming the go-to social tool for customer service.

**Member reach: medium to low**

## Facebook

Following the mantra “go where the members are,” associations enjoy a strong member following on Facebook.

Associations use targeted advertising on Facebook to drive consumer traffic to their public search sites and prompt members to advocacy engagement.

Those associations experimenting with the new Facebook Live feature say it draws a modest audience if events are promoted in advance. Popular live events include member reports from real estate conferences and announcements of association award winners.

**Member reach: high**

## Snapchat

Hyped as the next best way for members to reach millennial home buyers, Snapchat is getting a lot of attention but little use among associations as they take a wait-and-see approach to this image messaging and multimedia platform.

**Member reach: low**

## Pinterest

Good-quality images, such as housing data infographics, can go viral on this site due to its visual nature. Yet, a successful Pinterest presence takes effort since the focus is on collections of visual material as opposed to individual photo posts. While members use Pinterest to promote their listings and services, and offer advice to consumers on topics from remodeling to interior design, associations on Pinterest promote reasons for using a REALTOR® and local market stats. Association branding on this platform has proven challenging because dozens of users have already launched pinboards with association names.

**Member reach: low**

## YouTube

Associations of all sizes are jumping on the video bandwagon producing everything from weekly CEO updates and annual video annual reports to new-member orientation videos and event promotions. YouTube is the most popular platform for housing and sharing these videos via link to other social spaces. Some associations opt to house their video on Vimeo, which is very similar to YouTube, but it has no ads and content can be password protected, which is ideal for monetizing video education or delivering members-only content.

**Member reach: high**

## Instagram

This photo-sharing platform is flourishing among members who use it to generate leads by posting listing photos, but among associations it has yet to deliver. Although dozens of REALTOR® associations are found on Instagram, many accounts are relatively inactive. Staking out territory and claiming the association name on a social platform before someone else takes it is becoming common, as it becomes harder to determine which platform will be the next Facebook.

Associations that use Instagram do so to share photos of members at events, promote market infographics, and advertise to consumers. The demographic on Instagram skews younger, which may eventually enable associations to engage another segment of their overall audience.

**Member reach: low**

## WhatsApp

Beyond its application as a way to quickly communicate with directors, leaders, or staff in closed groups, this platform currently offers little practical use for reaching members in general.

**Member reach: low**

## Blogs

For associations with the staff to create original content or curate industry news, blogs are an effective way to deliver updates, perspectives, and content members can customize.

**Member reach: medium**

## Mobile Apps

Although many REALTOR® associations offer event-specific mobile apps, app fatigue is making members increasingly unwilling to download and update new apps. Associations are instead pushing to ensure that their websites are mobile-friendly.

**Member reach: low**

# Jeep

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# Deliver Better Technology Education

A look at the topics popular with trainers and in demand from REALTORS®.



Nobu Hata, NAR Director of Digital Engagement, presenting at an NAR Tech Edge event.

Considering that most associations have as part of their mission statement “to help members succeed in business,” it’s fitting that they’d offer technology education. Even if all real estate is local and personal relationships are the lifeblood of the industry, there’s no doubting the major role technology plays in the home-buying and homeselling process.

## But what topics do you need to offer your members?

“The hotter topics right now are going paperless in the cloud and using a lot of the free Google tools,” says real estate technology educator Craig Grant. “Anytime I teach stuff like that, the rooms are always filled.” Grant presents at dozens of real estate events a year, both association and franchise, and says real estate practitioners want to master doing business completely on mobile and stop relying on paper, “but a lot of them really have a tough time doing it.”

Kristyne Shelton at the small Aiken Board of REALTORS®, S.C., says courses on using an iPad, YouTube, and social media sell out quickly. “I think the key is finding a good instructor that focuses the class specifically on the real estate market,” she says.

Although most members can use a computer and browse the internet, determining which level of technology education will appeal to your members is tricky, AEs say.

To help plan the technology track at the annual Triple Play REALTOR® Convention & Trade Expo, Maureen Murphy, director of professional development at New Jersey REALTORS®, analyzes past attendee surveys, looks at what classes are popular at local associations, and asks local technology staff for recommendations. The conference’s planning committee takes into account all of this data and scours the submitted presentations for new ideas.

“At the last Triple Play, there was one session about

By Carolyn Schwaar



“The gap between broker and association is growing. Those associations that have decent broker relations tend to have more relevant education.”

—Nobu Hata, NAR Director of Digital Engagement

the ‘Amazon effect’ that was very popular,” says Murphy. “It had no CE so we were shocked that it had such a huge turnout.” The session focused on how consumers are looking for the same personalized, fast, consistent experience from their real estate professionals that they get online from Amazon.

Surveys, committees, and focus groups are the most often employed methods for gauging what members might want to learn, but Nobu Hata, NAR’s director of member engagement, has another idea: Hang out with top-producing members to see what they’re doing.

“The gap between broker and association is growing. Those associations that have decent broker relations tend to have more relevant education,” says Hata. “Those who don’t end up offering the same basic classes over and over again to members who won’t implement a thing.”

Hata recommends that AEs “launch a social media group filled with your top-producing members and tech masterminds, who will then draw a local crowd on the tech, marketing, and lead funnel topics, since it’s all one big conversation.”

So is technology so intertwined with business that classes merely on how to use an application or device are no longer relevant?

“Just teaching a pure Facebook class doesn’t bring them in the way it used to,” says Grant. “If you’re going to teach social media it’s got to be more about how to leverage all different aspects of social media to make your work easier. I’m seeing more interest in how REALTORS® can use technology to do their job better.”

Hata has been delivering his “What Buyers and Sellers Want” class nonstop for almost two years because it covers using the latest tech in an actionable way from people actually using it.

NAR’s growing one-day Tech Edge events, now offered nine times a year, feature a variety

of topics intermingling technology with business, such as “The Internet of Things and the REALTOR®’s Place In It” and “Working with the Connected Buyer and Seller.”

Hata, an emcee and presenter at several Tech Edge events, will cover social media ad campaigns, pay-per-click campaigns, content and lead curation, team building, using portals better in lead-generation campaigns, when to use “live” technology, and using offer and transaction management tech to prevent cyberscams.

One technology trend that’s important to note when planning education, says Hata, is the heavy investment franchises have made into proprietary technology and their push to get agents to use it. “Realty is training at every level to get their agents to use their Zap business platform,” he says. “Because there has been a lot of ‘shiny object syndrome’ spurred on by so many new tech tools in the industry causing agents to lose focus and money, brokers have been pushing their own platforms and a ‘nothing else outside of our bubble matters’ narrative.”

But while franchise agents are homing in on branded platforms, independents still have wide-ranging needs, says Sharon Hoydich, director of professional development at Florida REALTORS®. A broad menu of technology-related offerings designed to attract a wide audience is the plan at the 2017 Florida REALTORS® Convention & Trade Expo. “For this year’s event, we’ll have seven classes in our technology track featuring everything from Katie Lance on the power of Periscope to Stephan Swanepoel on digital innovations,” she says.

From understanding the relevance of Snapchat and Instagram to realizing the impact of Opendoor, Faira, and Haus, the key to delivering technology education and information to members comes down to understanding their needs and delivering relevance.

## Hot Topics in Tech Ed

*(from a social media survey of AEs and association education directors)*

- **How to use drones and drone footage**
- **Virtual and augmented reality in your business**
- **Understand big data and predictive analysis for lead generation**
- **Listing presentations on iPads and tablets**
- **Mobile productivity**
- **Hot apps**
- **How to shoot your own virtual tours**
- **Brand your YouTube page**
- **Evernote for productivity**
- **Analytics of Facebook**
- **Social media legal compliance**
- **Top 10 tools from RPR**

# Anatomy of a Marketing Campaign

Boost member response to your program, product, and event marketing efforts with a solid yet simple plan.

A large part of your job, especially if you don't have staff, is marketing—getting the word out to members about all that your association offers. In any given year, there are classes, conferences, golf tournaments, and much more to promote. A well-thought-out marketing campaign can boost awareness of and participation in any association offering.

If you send out emails about an upcoming class, post about an event you're hosting, or list your association's benefit partners on your website, you are conducting marketing. Yet a marketing campaign is a bit different; it's a targeted effort to increase awareness of a single product or service, and it has a defined duration.

## Essence of a Marketing Campaign

At the root of every successful marketing campaign is a strategy. Every marketing campaign needs a plan outlining the goals, measurable objectives, strategies, tactics, and metrics. Yet many professionals try to skip this critical step and dive right into the fun, creative components. Don't do this.

How will you ever know if how you market is working if you don't have goals? How will you know what types of messages work and where, if you don't analyze your tactics?

Let's look, for example, at the marketing campaign for an event. Probably the most important element of a event campaign is a successful plan with measurable objectives. The objectives of your plan can either derail your entire campaign or make it one of your most successful. Carefully crafted objectives are key to campaign success.

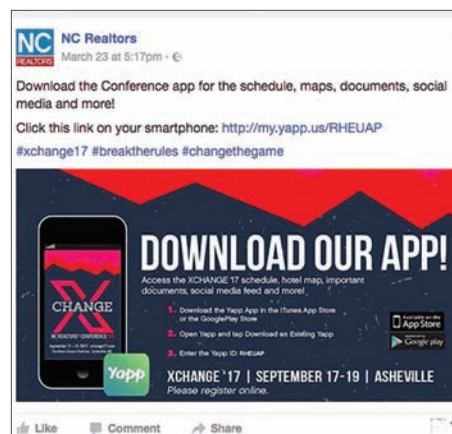
One of the most widely recognized ap-

proaches for crafting measurable objectives is the S.M.A.R.T. (Specific, Measurable, Actionable, Realistic, Time-based) framework.

Test all of your objectives using these five criteria. If your objective doesn't meet all five, tweak or rewrite it until it does.



North Carolina's marketing campaign for its annual conference employs stark graphics consistently across all email, web, print, and social media (below).



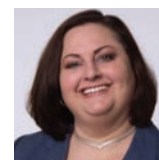
Most measurable objectives start with an action verb, such as "increase," "improve," "create," or "build." Similar to the journalistic principle of covering who, what, when, where, and why in the first paragraph of a news story, objectives identify the same core elements, emphasizing who is doing what, by how much, when, and where.

So one example of a well-written, measurable objective for an event marketing campaign could be: Increase member attendance at the event by 25 percent over 2016 attendance levels.

The above objective allows you or the campaign manager to report on the success or failure at the conclusion of the campaign. For example, was a 25 percent increase obtained? To say that your event objective is simply to have members attend is shortsighted.

A marketing campaign may have more than one objective. For example, we could add the objective of attracting 10 percent more younger members. But be careful not to overload one campaign with too many objectives.

Now that the tough part is out of the way, how do you tackle preparing and implementing a successful marketing campaign? The following is a 12-step process designed to give a broad preview of what's involved and what's most important in the process.



**Tracey Gould** is the director of communications and marketing for NC REALTORS®. Reach her at [tgould@ncrealtors.org](mailto:tgould@ncrealtors.org) or 336-808-4228, ext. 228.

## 12 Essential Steps of a Successful Marketing Campaign

### 1. Have clear goals.

Every campaign must have a compelling reason or overarching goal (a campaign should be part of a larger strategy and plan). For example, don't just make an attractive flier for your event and put it in your newsletter. Have a goal of increasing attendance, attracting a new category of attendee, etc.

### 2. Know your audience.

Do your homework to know your target market, audience, product, service, competition, and anything else vying for your audience's attention and business. The more you know, the better prepared you will be and the more successful your campaign will be. For example, if your marketing campaign is to increase participation in your continuing education classes, look at how other education providers in your area are marketing their classes. How can you make yours stand out?

### 3. Don't just communicate, engage.

Develop a plan for the campaign that will build community and conversation around the item or program that you're featuring. For example, don't plan on just using social media as a distribution channel for your CE class campaign; post thought-provoking questions about why members should take this class. Get members thinking and responding. Use the campaign to start a conversation

about how education will help members grow their career and make more money.

### 4. Sufficiently fund your effort.

Have a well-defined, goal-based (bottom-up) budget that includes staff hours, paid advertising, and printed material. Be realistic about how much time you or your staff will spend on the campaign and track actual time spent. This will establish a benchmark for future campaign.

### 5. Think multichannel.

Optimize your marketing mix to reach your audience where they are, which these days should integrate the social media channels your members use most, as well as email, and web at every turn.

### 6. Looks matter.

Have compelling creative with clear calls to action, using the best professional graphics you can afford.

### 7. Test, adjust, test again.

Preview drafts of your creative, calls for action, landing pages, and any other tactics and assets with a focus group to get feedback before the formal launch. It never fails: A focus group will always see something you missed or think of something you never thought of.

### 8. Don't make your audience think.

Keep in mind the audience and their jour-

ney from message to action. Make sure that the user experience, from email to website page and registration to attendance, is easy to navigate and branded similarly.

### 9. Ask members to help.

Have a plan for where and when you will run your campaign, but be careful not to spam your audience. Consider enlisting members to help you push the campaign on their own social channels.

### 10. Listen for feedback and answer it.

Practice active listening; in other words, seek out your audience's reaction to your campaign. Read their replies. Is there any confusion? Look for ways to engage with members about the campaign.

### 11. Measure, track, measure again.

Audit your efforts at regular intervals during the campaign with an eye toward how you can tweak your message, creative, headline, and distribution channels to improve response before the campaign ends.

### 12. Learn from your mistakes.

Document your steps and celebrate your success at the end of the campaign with a case study to reference for next time. What worked, what didn't, and what will you do differently next year?

NC REALTORS® has nine marketing campaigns scheduled for 2017, which all follow a similar structure and plan but vary in goals, funding, and tactics. After your first

few marketing campaigns, you'll be able to better gauge where and when your members are most receptive to your messages, which members respond, which types

of marketing materials grab members' attention, and how they prefer to respond. Armed with this data, you can more easily craft effective future campaigns.

# Online Copyright Rule Tune-up

Associations have a new deadline to ensure their websites comply.

The Digital Millennium Copyright Act is a 1998 federal act that provides copyright holders with significant protections from online copyright infringement. Through its safe-harbor provisions, the DMCA also offers safeguards for website operators facing copyright claims based on materials posted to their website by third parties.

In Dec. 2016, the U.S. Copyright Office made some small but significant updates to the administrative requirements for the DMCA. Every website operator should be aware of these changes, as they require you to take action by or before Dec. 31, 2017.

## How the DMCA Matters to REALTOR® Association and Member Websites

Copyright litigation can spark from the simple act of right-click-copy-paste or from a complex series of image transfers across multiple internet platforms. No matter the origin, copyright violations are serious business, and even inadvertent infringement can lead to financial losses and damage to your reputation.

REALTOR® association and member websites that allow third parties to post, publish, or push data onto their websites are especially vulnerable to copyright infringement claims, even if the business itself took no affirmative steps to publish the material in question. In the real estate industry, typical examples include blogs that allow visitors to post comments or reviews or broker websites that provide for the unmoderated display of third-party listings, most commonly via an IDX feed. Association websites can also be at risk in member forum sections and blogs.

In Dec. 2016, the U.S. Copyright Office made some small but significant updates to the administrative requirements for the DMCA.

Fortunately, thanks to the DMCA's safe-harbor provisions, website operators can protect themselves from copyright infringement liability that could otherwise arise due to third-party activity on their websites. NAR believes this safe harbor protection would include MLSs and participants and subscribers hosting an IDX feed, provided they comply with the DMCA safe harbor requirements. (See sidebar for practical tips on how to comply with the DMCA.)

## New Copyright Agent Registration Requirements

In the almost 20 years since the DMCA's inception, the U.S. Copyright Office has struggled with the best way to handle the registration of copyright agents. The copyright agent is the person you designate to handle copyright infringement claims regarding your websites—basically, it's the contact person you've registered with the government in case anyone wants to claim that you violated their copyright. Maybe it's you, maybe it's your tech guy, and maybe it's your association attorney.

During the past two decades, the registration process for copyright agents has been deemed an interim system, relying

on a paper-based registration process. Copyright agents have been required to print out a form, fill it out, and mail it in to complete their registration.

All of this is, of course, a bit ironic considering that the name of the act contains the word "digital." As of December 2016, this outmoded system was officially put to rest and a streamlined digital system was launched. Registration fees per each copyright agent have also been reduced from \$105 to \$6 per registration.

While much of this is good news, the new registration system does have one rub: All existing copyright agent registrations are going to be wiped out. Permanently. What does that mean from a practical standpoint? By or before Dec. 31, 2017, all website operators must reregister their copyright agents on the new copyright agent registration system, located at [dmca.copyright.gov/osp/login.html](http://dmca.copyright.gov/osp/login.html). Website operators who fail to reregister their agents will lose their right to claim DMCA safe harbor protections.

In addition, under the new registration system, a website's copyright agents must reregister every three years.

The DMCA safe harbor is a vital layer of protection for website operators. To help retain those protections, it is vital that you comply with the new copyright agent registration requirements.

Visit the U.S. Copyright Office's agent registration page to get started: [dmca.copyright.gov/osp/login.html](http://dmca.copyright.gov/osp/login.html).



**Jessica Edgerton** is an associate counsel at the National Association of REALTORS®. Contact her at 312-329-8373 or [jedgerton@realtors.org](mailto:jedgerton@realtors.org).

All existing copyright agent registrations are going to be wiped out. Permanently. All website operators must reregister their copyright agents on the new copyright agent registration system by or before **Dec. 31, 2017**.

## How to register for copyright infringement protection for your website

To take advantage of DMCA safe harbor protections, website operators must meet a number of key requirements. First, they must not have any actual knowledge of the infringing activity or otherwise be aware of facts or circumstances that make the complained-of infringing activity apparent. Second, they must not receive any direct financial benefit from

the infringing activity if they are capable of controlling the infringing activity. And third, website operators must post and follow a DMCA notice on their website (NAR's is pictured right). A DMCA notice must include the following information:

### 1. A termination policy for repeat infringers.

To qualify for safe-harbor protection, a website operator cannot allow the same person or entity to repeatedly publish infringing material on the website. An effective DMCA notice will provide an affirmative statement that repeat offenders will not be tolerated. NAR includes repeat infringer language in the "Termination" and "DMCA" sections of its Terms of Use.

**2. A takedown procedure.** The DMCA notice should clearly explain the steps to take if someone suspects that material published to the website constitutes copyright infringement. It should also

explain that potentially infringing material will be removed promptly following receipt of a takedown notice, including how to send a "takedown notice" to the copyright agent to inform the website owner of the potentially infringing material.

The DMCA notice should also state that infringing material will be promptly removed following receipt of a takedown notice. (And website owners should be sure to follow through on this statement, as leaving infringing material up will disqualify the business from safe harbor protection.)

### 3. Contact information for the website operator's copyright agent.

In order to take advantage of the DMCA safe harbor provisions, a website operator must designate a copyright agent and include the name, phone number, and email address for the copyright agent in the DMCA notice. A copyright agent can be an attorney, a business owner, or any other person who is ready, willing, and able to handle copyright infringement claims regarding the website. The website owner must also register the Copyright Agent with the U.S. Copyright Office. This is where the December 1, 2017, deadline comes in.

### Digital Millennium Copyright Act ("DMCA")

NAR respects the intellectual property rights of others and expects you to do the same. Per the DMCA, NAR will respond expeditiously to claims of copyright infringement on the Site if submitted to NAR's Copyright Agent as described below. Upon receipt of a notice alleging copyright infringement, NAR will take whatever action it deems appropriate within its sole discretion, including removal of the allegedly infringing materials.

If you believe that your intellectual property rights have been violated by NAR or by a third party who has uploaded materials to the Site, please provide the following information to NAR's designated Copyright Agent listed below:

- A description of the copyrighted work or other intellectual property that you claim has been infringed;
- A description of where the material that you claim is infringing is located on the Site;
- An address, telephone number, and e-mail address where NAR can contact you and, if different, an e-mail address where the alleged infringing party, if not NAR, can contact you;
- A statement that you have a good-faith belief that the use is not authorized by the copyright owner or other intellectual property rights owner, by its agent, or by law;
- A statement by you under penalty of perjury that the information in your notice is accurate and that you are the copyright or intellectual property owner or are authorized to act on the owner's behalf;
- Your electronic or physical signature.

NAR may request additional information before removing any allegedly infringing material. In the event NAR removes the allegedly infringing materials, NAR will immediately notify the person responsible for posting such materials that NAR removed or disabled access to the materials. NAR may also provide the responsible person with your e-mail address so that the person may respond to your allegations.

NAR reserves the right to terminate, limit or suspend any user's access to the Site in the event of repeated infringing activity. If you believe that a user of this Site is a repeat infringer, please follow the above instructions to contact NAR's Copyright Agent. Please include sufficient information to assist NAR in determining that the user repeatedly engaged in infringing activity.

NAR registered a designated agent with the Copyright Office pursuant to 17 U.S.C. 512(c).  
NAR's designated Copyright Agent is:

Ralph W. Holmen  
NATIONAL ASSOCIATION OF REALTORS®  
430 N. Michigan Avenue  
Chicago, Illinois 60611 United States  
312-329-8375  
rholmen@realtors.org [link sends email]

◀ In this example of NAR's DMCA statement from nar.realtor, the "designated agent" is clearly stated. NAR will be reregistering this agent in the U.S. Copyright Offices' new online system.

# 4 Things That Set Successful AEs Apart

Study shows the common personality traits of successful REALTOR® association CEOs.

Highly successful REALTOR® association CEOs may have dramatically different skills that enable them to perform at a higher level, yet they have amazingly similar personal characteristics.

In my Winter 2017 column, I mentioned my study of highly successful CEOs, the research process, and the results. I found that there are 10 skills for success that set top executives apart.

As is often the case in research, there are revelations—even surprises—that are tangential to the main subject but increase understanding. Although the primary focus of my research was on the unique skills of highly successful CEOs, I also discovered that there are four personality traits common among these executives, even though their individual success skills could be substantially different.

## Skill or Characteristic?

A skill is an individual's ability to do something well. It is competence and capability. A skill is an attribute that requires experience or training to perform well. It is the "how" of the job. For example, a good CEO skill could be the ability to ask the right questions to uncover essential information, or the ability to build and foster teamwork

among staff.

A personal characteristic is a defining feature of an individual. It is a personality trait, mannerism, or quality that makes someone recognizable. It is the "who" of the individual.

While the skills of a successful CEO, which I'll dive deeper into in future columns include fostering innovation, making personal connections, and adeptly wielding influence, here are the personal characteristics I found common among successful REALTOR® CEOs in my study.

## Modesty

**Highly successful CEOs are humble about their skills.**

Highly successful executives don't boast about their accomplishments and are even self-effacing when discussing success. They do not see themselves as that much more talented than competent CEOs. In my interviews with them, they were somewhat embarrassed to have been selected as among the "highly successful," a term I used when discussing performance with them.

As Illinois Association of REALTORS® Past President John Kmiecik said of CEO Gary Clayton, "He is understated and unpretentious, and that allows him to quietly and effectively make his points on any

issue. He listens, and because of his style, others quickly listen to his opinion."

Most CEOs deemed highly successful were amazed that their peers had such a high opinion of them. Yes, they knew they were competent, but not something dramatically higher. One successful CEO told me, "I will agree that I am a pretty good CEO. However, I don't see myself as that much better or stronger than most any of my experienced peers. I have a long way to go."

## Openness

**Highly successful CEOs are willing to share with fellow executives.**

Successful REALTOR® association CEOs believe sharing what has worked for them (programs, services, or methods) is a natural thing to do, whereas some CEOs in the study, who were not ranked as highly, think

When I set out to uncover the skills of highly successful REALTOR® CEOs, I was not seeking information about their personal characteristics, but the same four personal characteristics of successful CEOs kept reoccurring.

sharing ideas puts them at a disadvantage. Successful CEOs view openness as not a gain or loss, but as expected among professionals.

Many highly successful CEOs also are willing to mentor or coach other executives as they grow in their careers. This, too, is seen as normal, not to be constrained, and is the highest level of openness.

“My greatest thrill is working with new executives,” Ginger Downs, CEO of the Chicago Association of REALTORS®, said. “To be able to assist them in growing quickly by not making the same mistakes I did has been personally rewarding. In fact, I think I learn more from mentoring than they do.”

### **Drive for Improvement** Highly successful CEOs are constantly seeking personal and professional development.

The next characteristic was a bit surprising at first, but then made sense upon reflection. That characteristic is the drive by highly successful CEOs to become even better—to constantly improve. They want to reach further. Every successful CEO I interviewed named skills they wanted to improve or develop.

Successful CEOs are always stretching and growing. They are determined to get better. They take classes, visit websites, and read books to improve their craft.

Successful CEOs are always stretching and growing. They are determined to get better. They take classes, visit websites, and read books to improve their craft.

Several mentioned what they were reading and asked what I was reading that was of interest.

When I asked Bud Smith, former National Association of REALTORS® CEO, about attending a course that appeared to be below his level, he said, “If I don’t learn anything new from the presentation, then I know that I am current. However, I always hear something through a comment by the speaker or another attendee that sets me on a trail of study. When you are through improving, you are through.” Successful CEOs are at the zenith of their careers, yet they are still reaching.

### **Faith in the Mission** Highly successful REALTOR® association CEOs are personal advocates of homeownership as the American dream.

Highly successful CEOs are advocates of the values of homeownership, property rights, and community, not because it’s their job, but because they truly believe in it. Their own internal principles are aligned with the direction and purpose of the REALTOR® organization. This characteristic creates a stronger personal bond with the members.

As a past president said about Cindy Butts, CEO of the Connecticut Association of REALTORS®, “She is dedicated to the purpose of what we do and its impact on a

community. And she creates a culture of caring around her among the staff.”

Interestingly, this particular characteristic was recognized in successful CEOs not by their fellow CEOs, but by the REALTOR® leaders I interviewed.

When I set out to uncover the skills of highly successful REALTOR® CEOs, I was not seeking information about their personal characteristics, but the same four personal characteristics of successful CEOs kept reappearing. It was interesting that in the midst of differentiation of skills, there was commonality of characteristics.

### **Common Traits and Uncommon Performance**

Although there are 10 skills that define outstanding CEO performance, each particular skill differs with the individual. However, virtually all of the successful CEOs had these four common characteristics: They are modest, they are open, they are improving, and they are advocates.

Although skills can be cultivated and learned, personal characteristics are much harder to develop.

In future issues of REALTOR® AE magazine, I’ll explore the intangible skills of successful CEOs and how you can attain them.



**Jerry Matthews'** executive career spans more than 20 years as a REALTOR® state association CEO and more than 12 years as an industry consultant. His consulting practice focuses on facilitating change for executives and organizations. [JerryMatthews.com](http://JerryMatthews.com).

# Local Associations Pivot to Politics

Productively address local issues to shape your role as a voice in the community.

Tumultuous. Polarized. Political hatred. Red vs. Blue. Viral negativity. These words describe today's political climate. Extremists have dug trenches across the country, down the center of states, and through the middle of every county. We experienced it firsthand last year. Just as Donald Trump and Hillary Clinton were battling it out on the national stage, and Republicans and Democrats were battling in our North Carolina state capitol over the "bathroom bill," here in New Hanover County, where Cape Fear REALTORS® is headquartered, the climate created a division between left and right on the Special Use Permit language dealing with heavy industry.

Politics have never been easy to navigate in our area, but the spike in polarization has presented stiff challenges as we grow our REALTOR® Party efforts. For the past three years, our association has engaged in talks with other groups to streamline the SUP process. Business owners believed the SUP was dampening commercial development, while conservationists claimed that the county's unique natural habitats required extra protection.

With 2,450 members representing every stripe in the ideological spectrum, my association worked to find common ground. Both sides had valid points. The existing law was vague, thus acting as a deterrent to prospective businesses considering moving to the area. And at the same time, the Cape Fear region is the only place in the world where the Venus fly trap grows naturally.

Several drafts of new SUP language were proposed, and each was reviewed by Robinson & Cole through the National Association of REALTORS®' Smart Growth program. We presented the findings to the community. Yet, this represented a more proactive approach than our association had taken in the past on this type of issue and it made some in the community uncomfortable.

The suite of tools and resources offered to associations through the REALTOR® Party are substantial, and we encountered a bit of pushback from other groups about our advocacy role on the local level.

As questions were raised about what we were doing and why, we decided to disengage in the SUP discussions and work internally to better define our voice in the community. It was a good opportunity to

pause and reflect on the association's role in this new world of political engagement.

It is hoped that through its grassroots efforts, Cape Fear REALTORS® will offset polarization while placing itself firmly in the driver's seat of the community conversation.

## Defining our role in local politics

In contemplating how to present our advocacy role, I thought back to how the REALTOR® organization came into existence more than 100 years ago as a body to promote a Code of Ethics that differentiated its members from others. The shift to an advocacy organization happened gradually. In 2005, NAR began its pivot toward a political focus and expanded available advocacy tools. More recently, the Core Standards mandate ensured that all associations would participate in advocacy to some extent.

I've noticed the main role of my association shift from delivering member services to fostering community action-based efforts. We're more engaged in the community conversation now, which will build a new brand of relevance for us.

But how did our members view their association's role?

Cape Fear REALTORS® decided to host a



◀ REALTORS® Rally at North Carolina Association of REALTORS® Legislative Day.



Of course we have Democrats, Republicans, and independents, but when member ideology on issues was averaged in an Excel blender, as a group, members were almost in the middle (6.2 on a 10-point scale, where liberal is zero and conservative is 10).

series of focus groups to learn what members thought about advocacy. We hired a consultant to develop an unbiased process and series of questions. Next, we engaged the University of North Carolina Wilmington to provide facilitation and reporting duties. Of the five focus groups, four were for uninvolved members and one was for involved members—thus allowing us to compare responses from the groups.

Several trends emerged. For instance, members are very independent and are wary of others, including the association, representing a viewpoint in the public square that could reflect on them. There was an apprehension toward the REALTOR® organization building a local reputation that was either conservative or liberal.

Members said each REALTOR® should take personal responsibility for engaging in the community. Yet they voiced unanimous and strong support of the REALTOR®

Party. While appearing at odds, these two responses uncovered the need to increase education among members on advocacy and involvement in the political arena.

Focus group participants agreed that when Cape Fear REALTORS® engaged in the community, they should do their best to represent the membership and avoid using an outside group or lobbyist, which may carry with it a partisan reputation or views contrary to the local membership.

Another interesting finding from our focus groups was the political leanings of our membership. Of course we have Democrats, Republicans, and independents, but when member ideology was averaged in an Excel blender, as a group, members were almost in the middle (6.2 on a 10-point scale, where liberal is zero and conservative is 10).

Although other groups in our area typically gather around one ideology, Cape Fear REALTORS® does not. This affords us the unique opportunity to build bridges in the community, strengthen ties with homeowners, and protect the real estate industry in a bipartisan manner.

To own this role and build on it, Cape Fear REALTORS® is launching a large-scale, big-idea forum in partnership with University of North Carolina Wilmington, Cape Fear Community College, and NC REALTORS®. The forum scheduled for the fall, will feature a pro and con approach to issues that showcase civility while

educating residents. The pilot program will tackle the question of whether drilling for oil should take place off the coast of North Carolina. The association currently doesn't have a position on the issue.

National speakers will be former Shell Oil CEO John Hofmeister and Jacques Cousteau's son, Jean-Michel Cousteau. It is



Cape Fear REALTORS® event with the City of Wilmington, N.C. government and Lower Cape Fear Stewardship Development Coalition.



State Senator Michael Lee giving remarks at the Cape Fear REALTORS® Legislative Luncheon.

hoped that through its grassroots efforts, Cape Fear REALTORS® will offset polarization while placing itself firmly in the driver's seat of the community conversation.

In our strategy planning in March our leadership said, for the first time, that they wanted, as the top priority, for the association to be a strong advocacy group for the community. They are starting to see the value in it. Our challenge is to educate our members on why advocacy is important to their business.



**Shane Johnson** is the COO of the Cape Fear REALTORS®, N.C. Reach him at or 910.762.1695 or shane@capefear.realtor.

# Stop the AE Superhero Cycle

How to find your path toward a healthy and happy work-life balance.

**M**y mother was an AE. She was the CEO of the Apartment Association of California Southern Cities for more than 20 years. Try bringing up housing policy in Long Beach, Calif., and see how long it takes people to invoke her name. She dedicated her life to protecting property owners and small businesses and advancing the state of housing in Long Beach. She died in December.

Since then, I've come to realize that her story is, in fact, my story, and maybe your story, too.

She worked tirelessly. She ate poorly, skipped lunches, exercised never, and did what she could to make sure the needs of the association were met before her own. Late nights were a given, and family vacations were often interrupted by board members with questions.

She became diabetic and overweight and after she finally retired at age 67, the last three years of her life were spent in and out of hospitals or going to and from doctor appointments. It was not the leisurely retirement she had expected.

I resolved to not follow in her footsteps. I would never let a job take over my life the way it took over hers.

But now, one year into my job as an AE, I'm 40 pounds overweight. I belong to two gyms, neither of which I've seen the inside of in months, and I can't tell you the last time I took my lunch without it being a meeting. I usually take the 9 p.m. Amtrak out of Union Station to get home.

(By the way, I'm writing this on a lay-over where I'm flying back from our family vacation early for my association's board of directors meeting.)

In other words, I'm falling into the same trap my mother did. And from conversations I've had with my fellow AEs over the years (I'd been a GAD since 2000), I am not alone.

We love this job. We love the issues. We love the roles we get to play. We love the industry. We love the difference we make. However, it's time we look at the toll it can take if we don't put it in perspective.

To my executive board's credit, they tell me to slow down. They tell me I don't need to change everything overnight and that they want me to continue making the progress I am making with the association for a long time. And I truly appreciate that support. That said, their support doesn't always translate into less work or more time. So I've decided to make a plan. It's a guide I've started to write for myself to bring more balance into my life. It's aspirational, but it's a start. I hope you'll join me on this journey to becoming better AEs by putting ourselves (and our families) first.

## Step 1. Set (and stick to) work limits.

I try very hard not to take that call at 6:45 a.m. or 7:30 p.m., or during Sunday family dinner. I've set new limits for how available I'll make myself to members and directors outside of office hours. Of course there will be exceptions, but I know that the more I stick to my "unplugged time," the fewer calls I'll get.

## Step 2. Eat better.

I have to stop shoveling in my food between meetings, eating what is convenient over what is good for me, and ignoring my own health signs. I'm not a dietitian, but I know what my diet should be, and I've made a new pledge to follow what makes sense.

## Step 3. Take "me time."

Steve Jobs and Bill Gates regularly worked outside. Most U.S. presidents regularly took naps, and plenty of famous scientists and philosophers took walks during the day to allow their thinking to expand. My idea is to just take my lunch hour (the whole hour) away from work and away from the office. Whether it's sitting in the park, going to the gym, reading a novel, or just running a personal errand, it's a valuable exercise in letting go. The association will survive an hour without me.

## Step 4. Exercise more.

Believe it or not, I used to run marathons. The last one was in 2013, and I am going to get back to that shape. I'm going to start getting my money's worth from my gym memberships. I remember the energy, clarity, and strength that regular exercise delivers, and I want that back.

My mom was a wonderful person and a great AE, but she let her personal life and health slip in this job. Don't let yours.

*REALTOR® AE magazine will feature stories and advice for AEs on finding and maintaining work-life balance and health throughout 2017. If you have a story to share, contact Carolyn Schwaar, RAE editor, at [cschwaar@realtors.org](mailto:cschwaar@realtors.org).*



**Chip Ahlswede**, RCE, CEO, Beverly Hills/Greater Los Angeles Association of REALTORS®, spent five years as a REALTOR® Government Affairs Director in California. Reach him at 310-967-8800 or [chip@bhglaar.com](mailto:chip@bhglaar.com).

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# Fine Tune Your Performance Review

Re-evaluate your association's top AE assessment policy and procedures.

Every REALTOR® association executive will receive a performance review in 2017 to comply with the Core Standards. If you're like many AEs, this will be your first review in a long time and for some it will be your first review ever. It's natural to feel nervous, but remember that the goal of the review is not to find fault but to more clearly define your role and set expectations for the future.

The Standard stipulates that associations with paid staff not only must adopt policies and procedures for conducting annual performance reviews, but must have conducted that review by the certification deadline, which is Dec. 31, 2017, for the current cycle.

Although the Core Standards do not specify the details, the content, or the procedure for a review, NAR has a wide variety of resources available on [nar.realtor](http://nar.realtor) to help you and your directors plan for and conduct a professional review.

## Who to review?

The annual performance appraisal requirement applies only to the chief executive at associations with paid staff. Although a recent addition to the Core Standards requires associations with no paid staff to have the volunteer leader follow the continuing education requirement that applies to AEs, volunteer leaders are not subject to the performance review obligation. Adding a provision to your financial policies or employee manual clearly establishing the association's chief staff annual review policy will ensure consistency over time.

## Who does the reviewing?

The chief staff performance evaluation process varies from association to association, depending on each association's organiza-

tional goals, size, and distinct character. At some organizations, a volunteer committee conducts the review while at others, it is the job of the board of directors. In any case, consistency is important: some members of the evaluation committee should carry over from year to year. The composition of the evaluation committee should be documented in association policy.

## What is considered in the review?

If you do not have a current job description or clearly defined duties within your organization, misconceptions about your role may surface in the review. Will one reviewer evaluate you on your leadership abilities while another measures you on the successful of the annual conference?

Ideally the goals and objectives you'll be evaluated against were established during last year's evaluation. But for those new to the process, evaluation criteria could include achievement of results outlined in the strategic plan, adherence to budget, association compliance with the Core Standards, and criteria related to style and operations. Fortunately, there are 16 sample review forms specific to the role of the REALTOR® AE available in Word format at [nar.realtor](http://nar.realtor) (search for "sample evaluation forms").

Even if your annual review is planned for later this year, now is the time to establish the content of your review.

## How to conduct a fair review?

A review is fair only when you and your leaders agree on what your job is. This is often the hardest part of the review process. If your job isn't already clearly defined in a written document, refer leaders to the sample AE job descriptions on [nar.realtor](http://nar.realtor) (search for "custom AE job descriptions") that are

established according to the three kinds of associations: administrative, management, and leadership. Also refer to the check-list-of-duties document that details whether the AE or the president is responsible for certain tasks ([nar.realtor/presidentAEChecklist](http://nar.realtor/presidentAEChecklist)).

Even if your annual review is planned for later this year, now is the time to establish the content of your review.

Since many AEs will receive their first performance review this year, and their job descriptions may not have been updated or complete, disputes can arise. Seek out guidance from an employment law attorney or HR professional (such as Kevin Watkins at NAR, [kwatkins@realtors.org](mailto:kwatkins@realtors.org)) before the review if performance issues need to be addressed or documented. Your review policy should include the opportunity for an appeal. Your written rebuttal of your review will become part of the evaluation. All performance reviews are confidential.

## Does a review lead to a raise?

Although a review policy or employment contract may include the opportunity for a salary increase or performance bonus, the Core Standards does not require this. NAR's Strategic Association Management department (312-329-8311) can help you benchmark your salary against trends in the industry and provide resources and tips for asking for a raise. It is recommended that associations conduct benchmarking on all positions every two to three years.

Visit the HR Toolkit at [nar.realtor](http://nar.realtor) for more performance review resources.

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# Bring the Mountain to the Members

Combine technology with personal outreach to deliver association value.

As the AE of an association that spans a large territory, Tracy Huotari, RCE, has a two-pronged approach to reaching out to far-flung members.

First, she upgraded the association's technology.

Huotari, a 2008 Bud Smith Leadership Society Inductee, joined the 3,200-member North Bay Association of REALTORS®, Calif., in 2014 after 27 years leading the 450-member Duluth Area Association of REALTORS®, Minn. She immediately realized that the diverse four-county area was a hurdle to member participation.

before. These new participants bring their local views about what they want from their association."

Establishing a broader membership reach is a priority for Huotari. "Our goal is to have that connection with agents on the street and for them to value membership."

The second part of Huotari's member outreach strategy has been to take advantage of the association's unique council structure. North Bay has 10 local association councils, each with its own set of challenges, she says. "In terms of reaching the membership on a hyperlocal level, this

is where we really make a difference. Technology helps us with our member outreach, but the face-to-face is very important."

Some local councils have 20 to 30 members and others have a few hundred who meet on a weekly basis to discuss local issues or hear from local officials.

and social media and we're launching text messaging, but talking to them in person makes all the difference."

Another change that came with her move from Minnesota to California was no longer having an MLS, which further handicapped communication efforts, she says. "Since we don't have an MLS, we don't have that daily connection with members, because they don't have to sign into our website to access the MLS. We had to find new and different ways to communicate and provide professional development to members that is convenient to them."

In fact, Huotari says one of the biggest technology challenges that associations face is using it in a way that reaches members.

"We just can't expect members to come and be physically present at a class any more; technology has to help with that, too," she says. North Bay is moving toward offering a greater menu of live-streamed and recorded webinars and courses. "It's not an inexpensive endeavor to offer remote training. We're completely revamping our professional development to make it more accessible."

Huotari says her new leadership at North Bay had to get to know her, but she was quickly able to implement change by communicating clearly and truthfully and introducing new ideas about what's possible.

"I strive to be innovative and, as much as possible, I like to bring new ideas and different ways of doing things into the association.

Fortunately, I've been able to bring a different perspective on how to do things and the leadership has embraced those new ideas to really move the association forward."



Tracy Huotari, CEO, North Bay Association of REALTORS®, Calif.

"One of the first things we did was install all the equipment needed for remote participation in all of our committee and board meetings," says Huotari. "We've got members that are an hour and a half away, so for them to be involved in any association meeting was a huge commitment. So now we have the equipment where they just call in. We see their face on the screen, and they see us. We've gotten better participation and we're reaching people we couldn't

"The market in Napa is completely different than that on the coast, so this structure lets members be really local," says Huotari who drives out to each local meeting about once a quarter. Often she presents updates on association programs and products, but sometimes she's just there to listen. "I really enjoy going out to those local meetings and getting to know those members who are never going to set foot in the association office. We try to reach members with email



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