

New Advisor Onboarding

NAI Long Island
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Introduction Section 01

Welcome to NAI Long Island and thanks for considering commercial real estate as a career. The company has a long and consistent history of excellent client service. Our transition program has proven to be effective, and we strive to ensure that you have everything you need to be successful in the challenging world of CRE.

Vision Statement: NAI Long Island will be known as the advisor of choice that anticipates and responds to changes in the CRE environment in order to accelerate the success of clients and stakeholders.

Mission Statement: NAI Long Island works hard every day to provide CRE services and solutions that satisfy the requirements of clients in the markets we serve in an environment where advisors and staff enjoy opportunity and personal well-being.

Initially, you will be joining a leading Brokerage Training Program that will focus on the core professional skills for a successful commercial real estate career. Key components include:

- Training and mentorship to guide your learning and development

- A cohort of peers for knowledge sharing, comradery, and networking Leadership engagement to ensure long-term objectives and goals are met

- A transition compensation package that is the best of both worlds – salary to start with and a gradual shift to 100% commission

- Exposure to and interaction with a variety of successful brokerage teams

- Exposure, knowledge, and awareness of the services performed by NAI Long Island and how they benefit our clients

- You will participate in a 6 month onboarding program taking you through the services, processing and systems of NAI Long Island.

- You will learn how to develop new business, become a trusted advisor and the importance of “Speed Kills” and “Toma – Top of Mind Awareness”.

New Advisor Development Training

NADT Section 02

A commercial real estate advisor is an industry professional whose job is to advise our clients of their best courses of action when deciding how to invest in or improve real property or a commercial asset. Commercial real estate encompasses all aspects of sales, leasing, investment in or improvement of retail, office or industrial property, investment property, commercial land, businesses, industries, medical facilities and dozens of other types of property.

You may work with property owners who may want to sell a property, lease a property, have a property managed or determine what use might be better for the property than the current use. You may work with users of properties to find the best location for their business or investment, to determine if it's better for the user to lease a property or purchase and to understand the tax implications of their decisions. Additionally, you may work with investors to determine which real estate venture might be their best investment to meet their goals and needs. You may work directly with industry and community leaders, government officials, lawyers, zoning officers, accountants, mortgage companies, banks, title companies, appraisers, utility companies and everyone in between. While you can't make decisions for your clients, you can assist them in making better informed decisions and you can help them to understand what the highest and best use may be for a particular property, or what type of investment vehicle might be best for your client.

Commercial real estate is an exciting and rewarding field and can lead to dozens of different career opportunities each with the potential for extraordinary professional and monetary rewards. Whether someone is starting their first small business, developing a parcel of land, or considering an investment in real estate rather than an investment in a mutual fund or money market, the understanding of commercial real estate is fundamental to their decisions.

New Advisor Development Training

NADT Section 02

Training: The formal training process utilizes the Black Belt Brokerage Commercial Agent Development System, a six-month training program in which you will graduate through six different skill levels, each of them named after a "colored belt." These belts are akin to the journey of the Martial Artist who dedicates herself to the training, practice, and challenges of earning the black belt which represents the pinnacle of achievement.

The Black Belt training will be supplemented with targeted Lipsey Co Training Videos, The Leasing Guru Advanced Lease Training Videos and other training material supplied by the company.

The company encourages each Associate to pursue industry designations such as SIOR or CCIM and to pursue a specialty. The company will support the effort based on individual performance and participation in the NADT process.

Accountability: New Advisors, as a team, will generally meet bi-weekly. At that meeting, any broad-based issues that the Associates may have such as assignment or lease/contract questions will be discussed along with market updates and talking points. There will be a "brainstorming session" for all new assignments, and any "challenged" assignments". Specific deal related issues will be discussed separately by the Associate and Management unless it has relevance to all.

Reporting: Associates will submit a written report prior to the bi-weekly meeting on activity related to their contact database status, personal branding (TOMA), networking activity, prospecting (Speed Kills) and their pipeline (assignment status) and will be reviewed as required. If there is a conflict, which happens from time to time, and an Associate cannot make the meeting, then a separate meeting will be scheduled as required. However, the report(s) shall still be due. All new assignment forms and lease/sale forms along with a copy of the listing, lease or contract shall be submitted to the Compliance Administrator with copies to the Manager.

Planning/Goal Setting: Each Associate will prepare a personal business plan on a format as prescribed by the company. See nailongisland.com training pages for business plan information. Details on developing a personal business plan can be found at <https://nailongisland.com/training-associate-business-plans>. It is due on or before December 15 each year for review by Management.

Getting Started – First Steps

1. Arrange for transfer of your NYS RE License to NAI Long Island. See Lee Rosner for further information.
2. Log into Desktop PC at your desk. Lee will provide your Username and Pswd.
3. **IMPORTANT!!** Start managing/saving your usernames and password using KeePass App
4. Set up your nailongisland.com email (gmail) on Desktop PC and Mobile Device. You have received an email from Google to your personal email address with instructions for logging in and creating a new password.
5. Check your nailongisland.com email to obtain your nailongisland.com WordPress Username and Pswd in order to access the training resources found at <https://nailongisland.com/training/>
6. Ask Administrative Support (Krista) what your direct dial telephone number is and your Vertical Wave Username and Pswd
7. Log into Vertical Wave Viewpoint Telephone App on Desktop PC in office. Add a) Voice Title and b) Main VM Greeting through Viewpoint App. Learn more at <https://www.waveanswers.com/waveanswers/answers?labelid=9ad17bbbe0f238d94d001535a5290e11> and <https://nailongisland.com/wp-content/uploads/2022/09/Viewpoint-Phone-Quick-Reference-User-Guide-Ver-7.0.pdf>
8. Add Vertical ViewPoint Mobile App to Mobile Device (Apple or Android App Store). You will need your Vertical Wave username and pswd (see Lee Rosner for that info). Learn how to use the phone system by reviewing, <https://www.waveanswers.com/waveanswers/answers?labelid=8fc1da1f846c0af49e79390a5a15f8ac>
9. Either send Lee Rosner any recent corporate headshots you have of yourself or arrange to get your photo taken with Trish Stockert (pstockert@nailongisland.com) in the office. Please dress for success for the photo shot. Business attire with a white shirt/blouse. A tie isn't necessary. Dark sport coat or equivalent over white short/blouse works best.

Getting Started – First Steps - Continued

Training Section 03

10. Log into a) Buildout b) CoStar and start learning how to use both products. Both of these mission critical app's have robust training resources. See <https://support.buildout.com/hc/en-us/articles/360053295353-Buildout-Orientation-Video-> for Buildout and <https://www.costar.com/newsearch/help> for CoStar
11. Familiarize yourself with Google Workspace, our main platform for email, calendar, video conferencing, other electronic communications and more. <https://support.google.com/a/users/?hl=en#topic=11499463>
12. Work on creating a professional bio. Go to <https://nailongisland.com/connect/find-nai-long-island-people> for examples
13. Familiarize yourself with KoFax Power PDF Advanced, our PDF creation and editing desktop application. Visit https://www.youtube.com/playlist?list=PL0N-Vm5_h46v2FHQpTtKd56jvJ6gbRUSd for training videos
14. Familiarize yourself with Microsoft Office 365 and its extensive list of business software including Word, Excel, Powerpoint, Access, Publisher, Outlook, Teams and More. Visit <https://support.microsoft.com/en-us/microsoft-365> for training videos. You can install Office 365 Desktop apps on your laptop and home computer as well.
15. Enroll in the six-month Black Belt Brokerage Commercial Agent Development at https://black-belt-brokerage.teachable.com/purchase?product_id=4270894 and start coursework

As a Commercial Real Estate Advisor, you will be a part of a talented and driven team that thrives on working in a fast-paced environment and using initiative to create opportunities. We are seeking natural relationship-builders to form close working relationships and deliver the highest standards of service to clients.

Basic Activities:

- Develop business and negotiates the selling and leasing of commercial real estate properties for clients.
- Secure new and expanded business opportunities through prospecting, networking, relationship building.
- Compile property data for clients, such as tenant surveys, summary reports, status updates, and presentations for listing or tenant representative assignments.
- Prepare Request for Proposals (RFP) and reviews RFP responses.
- Analyze data and prepares real estate reports on average asking rents, tenants in the market, historical data, and market comparisons.
- Gather and coordinate materials necessary for transactions such as listing agreements, commission agreements, leases, and sales agreements.
- Prepare offers, term sheets, and lease amendments.
- Accompany prospective clients to property sites to discuss property features, leasing rates, and terms.
- Prepare form real estate listing agreements, contracts and leases. Participate in contract negotiations and due diligence.
- Maintain current knowledge of market conditions, property values, and legislation that may affect the real estate industry.
- Draft correspondence to existing and prospective clients. Gathers, prepares, and distributes marketing materials.

Basic Activities: (Cont.)

- Maintain current knowledge of market conditions, property values, and legislation that may affect the real estate industry.
- Drafts correspondence to existing and prospective clients. Gathers, prepares, and distributes marketing materials
- Engage in local business community and charitable events, as well as industry and professional associations for the purpose of creating new contacts and generating new business.
- Maintain accurate and up-to-date information in company databases - prepare and manage documentation and internal databases to ensure most up-to-date property and client information is on record
- Use a variety of research tools to understand the market dynamics, trends, and overall real estate opportunities
- Prospect to generate new business, client relationships and further develop existing relationships with an assertive, positive, and persistent style
- Identify client needs, prioritizing pain points, and proposing tailored solutions Prepare marketing materials for property listings and promote to qualified buyers Negotiate exclusive listing agreements, and purchase and sales agreements
Participate in best-in-class training and ongoing skills-development workshops
- Partner closely with other Associates of staff to ensure knowledge sharing and cross-team collaboration
- Proactively source and manage exclusive relationships with clientele to a successful conclusion.
- Initiate and develop strategic market positioning and business development plan.

Skills and Qualifications

To be successful, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skill, and/or ability required.

- Excellent written and verbal communication skills. Strong organizational and analytical skills. Ability to provide efficient, timely, reliable and courteous service to customers. Ability to effectively present information. A self-motivated and ambitious professional. Goal-oriented with a focus on personal development. Well-developed communication and relationship-building skills. Excellent multitasker and enjoy working in a fast-paced environment. A high level of personal responsibility, honesty, and empathy. Ability to bounce back from rejection and solve problems creatively.
- Thorough, accurate, organized, and productive.

Preferred Qualifications

- Bachelor's degree in a relevant field (BA/BS)
- Knowledge of financial terms, principles and perform basic financial analysis. Possess, or desire to earn, your real estate salesperson's license. We will provide financial support.
- Ability to comprehend, analyze, and interpret documents. Requires intermediate analytical and quantitative skills.
- Intermediate skills with Microsoft Office Suite.

NAI Long Island is the leading commercial real estate firm



About
NAI Long Island
Section 05

Full Service Commercial Real Estate Firm

From Start to Finish

NAI Long Island has gained a reputation for excellence in all facets of commercial real estate. We are the only local company to provide all-encompassing real estate services including brokerage, investment analysis, property management, market research, consulting, feasibility studies and site selection. From of Islandia, NY headquarters, NAI Long Island serves the Long Island commercial real estate market and beyond through the vast global network of NAI affiliates. NAI Long Island' highly experienced real estate professionals and exceptional support staff are the cornerstone of our people, systems and results operating philosophy.

As the regional NAI Global partner, we assist clients with their requirements across the country and throughout the world. NAI Global is the largest, most powerful global network of owner-operated commercial real estate firms actively managed to deliver seamless, exceptional performance to real estate clients with local, regional or global needs.

15 Advisors
3 Support Staff

Appendix

- Equal Opportunity/Affirmative Action
- New Advisor Orientation Plan

NAI Long Island is an Equal Opportunity / Affirmative Action employer. Discrimination of any type will not be tolerated. All qualified applicants will receive consideration for employment without regard to race, color, religion, sex, national origin, sexual orientation, gender identity, disability, protected veteran status or any other characteristic protected by state, federal, or local law.

The New Advisor Orientation Plan is designed to integrate a new advisor with the company's culture, systems, policies and procedures and processes and provide the tools and information needed to efficiently become a productive Associate of our team. This process will last 3-4 weeks for the initial introduction and training followed by up to 15 weeks of structured CRE training.

Timeline – Under development

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