



A2 ACHIEVE PRINTABLE MEETING KIT | PREPARATION GUIDE FOR SAMANTHA WILDER

PURPOSE OF THIS MEETING

This meeting is not about asking someone to give you a job on the spot.

Your goal is to help the broker understand what you actually do, learn how their brokerage operates, identify where they may have needs, and determine whether there could be a place for you now or in the future.

You are not presenting yourself as an agent looking for a new place to sell.

You are presenting yourself as an experienced real estate operations professional and associate broker who can help a brokerage become more organized, more consistent, more compliant, and easier for agents and clients to navigate.

YOUR MAIN MESSAGE

I want to stay in real estate, but I do not want my next position to be centered on building a personal sales business.

The part of real estate I enjoy most, and where I believe I bring the most value, is behind the scenes. I enjoy managing contracts, reviewing files, tracking deadlines, coordinating transactions, supporting agents, solving problems, communicating with clients, and creating systems that keep the office running.

I am looking for a brokerage operations, office management, transaction management, or brokerage administration position where those responsibilities are formally recognized.

WHAT YOU WANT THE BROKER TO UNDERSTAND

- You are not leaving real estate.
- You are not trying to escape responsibility.
- You are not looking for an easy administrative job.
- You are looking for a role that better matches the level and type of responsibility you already carry.
- You understand the full transaction, not just one task.
- You know contracts and required documents.
- You review files for missing signatures, dates, initials, disclosures, and addenda.
- You manage listing and closing processes.
- You coordinate with buyers, sellers, agents, lenders, inspectors, contractors, closing attorneys, and other professionals.
- You understand contingencies, earnest money, repair negotiations, extensions, first-right-of-refusal agreements, remote closings, settlement statements, commissions, and closing logistics.
- You create systems when a process is disorganized.
- You are comfortable handling confidential financial, personal, legal, medical, property, and business information.
- You know how to remain calm when a transaction becomes emotional or complicated.

- You have an active Alabama broker license, but you are not seeking to become the qualifying or operating broker at this time.

YOUR BEST PROFESSIONAL POSITIONING

- Associate Broker
- Real Estate Operations Professional
- Brokerage Operations and Transaction Support
- Real Estate Office and Transaction Manager
- Brokerage Administrator
- Transaction and Compliance Coordinator
- Office and Executive Operations Manager

WHAT YOU ARE LOOKING FOR

- A small or midsize, productive real estate office or team
- A broker who values initiative and does not need to micromanage every task
- A clearly defined role
- The authority to manage the responsibilities assigned to you
- The ability to improve systems and processes
- A salary or salary-plus-bonus compensation structure
- Compensation that reflects your licensing, experience, workload, and responsibility
- A position that allows you to work primarily during normal business hours
- Reasonable boundaries around evenings, weekends, and personal time
- A professional environment where operations work is treated as essential to the business
- Opportunities to grow into a larger operations or management role

WHAT YOU ARE NOT LOOKING FOR

- A commission-only sales role
- A position that requires you to build your own client pipeline to earn a dependable income
- A large brokerage environment where the work feels like an assembly line
- A vague catch-all position with no defined priorities
- A role where management-level responsibilities are assigned without management-level authority or compensation
- Constant after-hours communication about work that can wait until the next business day
- A job that is called administrative support but actually includes several separate full-time functions
- A position built around busywork rather than results

YOUR PRIVATE COMPENSATION GOAL

Your current target is approximately \$75,000 in total annual compensation. That could be structured as salary only or as salary plus a clearly defined bonus.

Do not open the conversation with a number unless the broker asks. First determine what responsibilities the broker has in mind.

A position managing an entire office, reviewing transactions, training agents, overseeing compliance, coordinating staff, supporting leadership, and remaining available as a licensed broker should not be priced like an entry-level administrative-assistant position.

HOW TO EXPLAIN WHY YOU ARE LOOKING

Keep this positive and professional. Do not make the conversation about frustration with your current employers.

Use this:

I have learned an incredible amount in my current position, and my responsibilities have grown significantly since I started. I entered the business in a support role, earned my salesperson license, and then earned my broker license. Over time, I realized that my strongest skills are in operations, contracts, transaction management, organization, and problem-solving. I am ready for a position where that work is formally defined and where there is a clear opportunity to grow.

You may also say:

I am grateful for the experience I have gained. At the same time, I have reached a point where I need a more clearly defined professional role, better boundaries, and a compensation structure that reflects the level of responsibility I carry.

Do not say:

I am doing everything.

They do not appreciate me.

I am tired of being treated like someone's mother.

I am underpaid and overworked.

The office is chaotic.

I need to get out immediately.

Those feelings may be valid, but they should not control this conversation.

CONFIDENTIALITY REQUEST

Because real estate is a close-knit industry, you need to address confidentiality directly.

Use this:

I do need to ask that this conversation remain confidential for now. My current employers do not know that I am exploring other opportunities. I want to handle any transition professionally, but I also need to protect my current employment until I know whether there is a realistic next step.

You can add:

I am being very selective about who knows I am looking. I am not trying to create problems or surprise anyone unnecessarily. I simply need the opportunity to explore what may be available before making an announcement that could affect my current position.

Do not apologize for requesting confidentiality. It is a reasonable request.

However, understand that no one can absolutely guarantee that information will not travel. Share only what is necessary.

MEETING GOALS

By the end of the meeting, try to learn:

- How the brokerage is currently structured
- Who handles contracts and file review
- Who manages agents, staff, vendors, schedules, and office procedures

- Whether the broker feels overwhelmed by operational responsibilities
- Whether agents consistently submit complete files
- Whether the office has a transaction coordinator
- Whether the brokerage has a defined compliance-review process
- Whether the broker wants to grow
- Whether growth is being limited by a lack of operational support
- Whether there is currently a role available
- Whether the broker may create a role for the right person
- Whether the broker knows another brokerage that needs someone with your experience
- Whether the compensation and work expectations could realistically meet your needs

WHAT TO TAKE

- Your targeted resume
- A one-page professional value statement
- A list of the systems and responsibilities you currently manage
- A notebook
- A printed list of questions
- A sample role proposal, but only offer it if the conversation becomes serious

Do not take confidential client files, brokerage documents, contracts, financial information, internal reports, passwords, or anything owned by your current employer.

You may later create redacted examples of checklists or systems, but every client name, property address, dollar amount, agent name, brokerage identifier, and confidential detail must be removed.

60-SECOND PROFESSIONAL INTRODUCTION

I entered real estate in 2020 in a support position, but my role expanded very quickly. I earned my Alabama salesperson license in 2021 and my broker license in 2024.

Today, I manage a large portion of the operational and transaction work behind a high-volume residential real estate business. I work with listings, contracts, contingencies, MLS updates, earnest money, inspections, repairs, lenders, closing attorneys, commissions, settlement statements, client communication, closing schedules, and file compliance.

I have learned that I am not interested in building my career around personal sales production. My strongest work is in operations. I enjoy organizing the process, reviewing contracts and files, supporting agents, communicating with clients, and making sure things do not fall through the cracks.

I am now exploring brokerage operations, office management, transaction management, or brokerage administration positions where that work would be my defined role.

SHORTER VERSION

I am an Alabama associate broker with nearly six years of experience managing the operational and transaction side of a high-volume residential real estate business. I am not looking to build a personal sales business. I am looking for a brokerage or office management position where I can use my experience with contracts, compliance, transaction coordination, agent support, client communication, and process improvement.

CONVERSATIONAL VERSION

I have figured out that I love real estate, but I do not necessarily love the idea of my future depending on whether I want to chase listings and buyers.

The part I am good at is making the whole operation work. I like contracts, deadlines, file review, closings, fixing problems, supporting agents, and creating systems. I am looking for a brokerage where that is recognized as a real professional role rather than something added onto an administrative-assistant position.

WHAT YOU COULD DO FOR A BROKERAGE

BROKERAGE OPERATIONS

- Manage daily office workflows
- Establish clear priorities and follow-up procedures
- Create and maintain office calendars
- Coordinate staff, agents, vendors, and service providers
- Identify operational gaps before they affect clients or transactions
- Create repeatable office systems
- Help leadership stay focused on business development and agent support

TRANSACTION MANAGEMENT

- Monitor transactions from contract through closing
- Track important dates, contingencies, inspections, repairs, extensions, and closing requirements
- Maintain transaction calendars
- Communicate with agents regarding missing information or approaching deadlines
- Coordinate with lenders, closing attorneys, inspectors, surveyors, contractors, and other vendors
- Help agents and clients understand what is needed next
- Assist with remote-closing logistics

FILE REVIEW AND COMPLIANCE SUPPORT

- Review files for missing signatures, initials, dates, disclosures, addenda, and required documents
- Confirm that transaction files are organized and complete
- Monitor MLS status changes
- Track earnest money documentation
- Review contract terms and deadlines
- Communicate file issues to agents and the qualifying broker
- Help prepare the brokerage for audits and file reviews
- Maintain appropriate recordkeeping systems
- Provide administrative compliance support without presenting that support as legal advice

AGENT SUPPORT

- Help onboard agents
- Train agents on Dotloop, DocuSign, Valley MLS, forms, and office procedures
- Answer routine transaction questions
- Create checklists and instructions agents can follow
- Help agents prepare listings and contracts
- Coordinate open-house and showing support when appropriate
- Reduce repeated interruptions to the broker by handling questions within the authority of the position

- Identify when an issue needs to be escalated to the qualifying broker

CLIENT EXPERIENCE

- Serve as an informed second point of contact
- Provide clear transaction updates
- Help clients understand deadlines and upcoming responsibilities
- Reduce frustration by identifying missing information early
- Assist clients who have difficulty with technology, travel, scheduling, or remote documents
- Help de-escalate emotional situations
- Make sure clients feel informed without overstepping the agent-client relationship

OFFICE SYSTEMS

- New-agent onboarding checklist
- New-listing checklist
- Contract-to-closing checklist
- Transaction calendar
- Missing-document tracker
- Earnest money tracker
- Inspection and repair tracker
- Closing extension tracker
- First-right-of-refusal tracker
- MLS status checklist
- Remote closing procedure
- Vendor contact list
- Agent training materials
- Client communication schedule
- Closing reminder templates
- Post-closing checklist
- Property expense tracker

QUESTIONS FOR THE BROKER

ABOUT THE BROKERAGE

How many agents are currently affiliated with the brokerage?

Are most of the agents full-time, part-time, new, or experienced?

Is the brokerage planning to grow?

What type of growth are you hoping to achieve?

What do you believe is currently working well within the office?

What parts of running the brokerage take more of your time than they should?

What responsibilities tend to fall back on you because no one else owns them?

Where do transactions most often become delayed, disorganized, or frustrating?

ABOUT CURRENT OPERATIONS

Who currently manages the day-to-day office operations?

Who reviews transaction files?

Who tracks missing documents and approaching deadlines?

Who handles MLS questions and status updates?

Who coordinates with closing attorneys, lenders, inspectors, contractors, and vendors?

Who trains or onboards new agents?
Who answers agents' routine questions?
Who manages office calendars, meetings, schedules, and procedures?
Do you currently have a transaction coordinator?
Is that person employed by the brokerage, hired independently by agents, or outsourced?
Are agents responsible for managing every part of their own file?
How consistent are agents about submitting complete documents?
Do you have standard office checklists and written procedures?
Are those procedures actually being used?
What software systems does the brokerage use?
What reports or information do you wish you had more consistently?

ABOUT THE ROLE

Have you considered hiring an operations manager, office manager, transaction manager, or brokerage administrator?
What would you want that person to take off your plate?
Would the position primarily manage the office, transactions, agents, or a combination?
Would the person have authority to follow up with agents regarding missing documents and deadlines?
Would the person review files before they reach you?
Would the person help develop procedures and training?
Would the person supervise any employees or contractors?
Would the role include bookkeeping, payroll, accounts payable, or financial reporting?
Would the role include personal-assistant responsibilities?
Would the person be expected to produce real estate sales?
Would maintaining an active real estate license be required?
Would the person be expected to serve as the qualifying broker?
How would success be measured during the first six months?
What problems would you hope this person could solve immediately?

ABOUT WORK EXPECTATIONS

What are the standard working hours?
How often would evening or weekend work be expected?
How are after-hours issues handled?
Would the person be expected to answer calls and texts outside business hours?
Is the role onsite, hybrid, or potentially partially remote?
How much independent authority would the person have?
How do you prefer to communicate assignments and priorities?
How often do you meet with staff?
How do you handle urgent requests versus work that can wait until the next business day?

ABOUT COMPENSATION

Is this a salaried position?
Is there a bonus structure?
How is the bonus calculated?
Are there any commission expectations?
What benefits are included?
How much paid time off is provided?
Which holidays are paid?
Is health insurance available?

Are real estate licensing fees, MLS fees, continuing education, association dues, or professional-development expenses covered?

Is mileage reimbursed when travel is required?

How often is compensation reviewed?

Is there a path from office or operations manager into director-level responsibility?

ABOUT CONFIDENTIALITY

Would you be willing to keep our conversation confidential while we determine whether there may be a fit?

At what point would you need to contact my current employer?

Would you be willing to use other professional references during the initial stage of the process?

QUESTIONS YOU SHOULD BE PREPARED TO ANSWER

WHY DO YOU WANT TO LEAVE YOUR CURRENT POSITION?

I have grown significantly in my current role, and I am grateful for the experience. My responsibilities have expanded across transactions, contracts, closings, client communication, operations, and executive support. I am ready for a position where that work is more clearly defined and where there is a formal path for growth.

WHY DO YOU NOT WANT TO WORK AS AN AGENT?

I value my license and plan to keep it active, but I have learned that my strongest skills are not centered on building a personal sales pipeline. I am most effective when I am managing the process, reviewing contracts and files, supporting agents, solving problems, and keeping the office organized. I want my primary role and compensation to reflect that work.

ARE YOU TRYING TO GET AWAY FROM CLIENTS?

No. I enjoy working with clients, especially when I can help them understand the transaction and reduce some of the stress. I am open to client communication as part of the role. I simply do not want my income to depend primarily on finding and converting my own buyers and sellers.

HAVE YOU MANAGED EMPLOYEES?

I have not held a formal supervisory title. I have trained and supported agents, coordinated tasks, managed showing schedules, assisted with transaction questions, helped resolve conflicts, led open-house preparation, and stepped in when other people were unavailable. I am ready to take on formal supervision, but I would not overstate the management authority I have held so far.

WHAT MAKES YOU QUALIFIED TO MANAGE A BROKERAGE OFFICE?

I understand the business from both the licensed and operational sides. I know contracts, documents, deadlines, MLS requirements, closing processes, agent needs, client concerns, and the importance of compliance. I also know how to create systems, follow up, protect confidential information, and keep multiple moving parts organized.

HOW DO YOU HANDLE PRESSURE?

Real estate teaches you quickly that many problems are connected. A lender delay can affect several closings. An inspection issue can become emotional. Missing paperwork can hold up an entire transaction. I focus on what can be controlled, communicate clearly, identify the next action, and keep following up. Becoming upset does not solve the problem.

WHAT IS YOUR MANAGEMENT STYLE?

I am direct, organized, and supportive. I believe people need clear expectations, useful systems, and accountability. I do not want to micromanage capable people, but I will follow up when a deadline, client, contract, or compliance requirement is involved.

HOW DO YOU DEAL WITH AN AGENT WHO DOES NOT TURN IN COMPLETE FILES?

I would start with clear written expectations and a consistent checklist. I would identify exactly what is missing, communicate the deadline for correcting it, and document the follow-up. If the same issue continued or created a compliance concern, I would escalate it to the qualifying broker according to office policy.

WHAT WOULD YOU DO IN YOUR FIRST MONTH?

I would first learn how the broker wants the office to operate. I would review the current workflow, software, calendars, checklists, file-review process, communication methods, and division of responsibilities. I would identify immediate risks and recurring frustrations before recommending major changes.

WHAT WOULD YOU CHANGE?

I would not walk into a new brokerage assuming everything needs to be changed. I would first determine what is working, what is required by the broker, where agents are struggling, and which problems are actually costing the office time or creating risk. Then I would recommend practical improvements.

WHAT ARE YOUR SALARY EXPECTATIONS?

Based on my broker license, transaction experience, operational responsibilities, and the scope of the type of position we are discussing, I am targeting total compensation around \$75,000. I am open to discussing how that is structured, including salary or salary plus a clearly defined performance bonus.

WHAT HOURS ARE YOU AVAILABLE?

I am looking for a position built primarily around normal business hours. I understand that real estate occasionally requires flexibility, and I am not unwilling to respond to a genuine urgent issue. I do want reasonable boundaries so routine work does not consistently take over evenings and weekends.

CAN WE CONTACT YOUR CURRENT EMPLOYER?

Not at this stage. My current employer does not know that I am exploring other opportunities, and the industry is small. I can provide other professional references who are familiar with my work. I would want to discuss the timing before my current employer is contacted.

POTENTIAL ROLE PROPOSAL: REAL ESTATE OPERATIONS AND OFFICE MANAGER**POSITION PURPOSE**

The Real Estate Operations and Office Manager supports the broker, agents, clients, and business by creating consistent systems, managing office and transaction workflows, improving communication, monitoring documentation, and making sure operational responsibilities are completed accurately and on time.

The position allows the broker to spend more time leading the brokerage, developing agents, managing risk, recruiting, and growing the business.

POTENTIAL RESPONSIBILITIES

- Manage day-to-day office operations
- Maintain office calendars, schedules, meetings, and deadlines
- Develop and maintain brokerage procedures and checklists

- Coordinate new-agent onboarding
- Train agents on transaction systems and office processes
- Provide routine agent support
- Review transaction files for missing or incomplete documents
- Track contract contingencies and approaching deadlines
- Maintain transaction and closing calendars
- Communicate with agents regarding outstanding requirements
- Coordinate with closing attorneys, lenders, inspectors, surveyors, contractors, and vendors
- Monitor MLS listing and status requirements
- Track earnest money documentation
- Assist with remote-closing arrangements
- Review closing documentation for administrative accuracy
- Maintain organized and audit-ready transaction records
- Support the qualifying broker's compliance process
- Create client communication and closing-reminder procedures
- Assist with difficult transaction or client situations
- Coordinate office vendors and service providers
- Manage administrative staff or contractors as the office grows
- Prepare operational reports for brokerage leadership
- Identify recurring problems and recommend improvements
- Protect confidential brokerage, client, financial, legal, and personnel information

POTENTIAL PERFORMANCE MEASURES

- Percentage of files submitted complete
- Reduction in missing-document follow-up
- Reduction in preventable closing delays
- Accuracy of MLS status updates
- Agent onboarding completion
- Timeliness of contract and closing-calendar updates
- Agent satisfaction with office support
- Client communication consistency
- Audit and file-review readiness
- Completion of written procedures and checklists
- Broker time saved through delegated operational responsibilities

POTENTIAL 90-DAY PRIORITIES

FIRST 30 DAYS

- Learn the brokerage structure, expectations, and current systems
- Meet with the broker and key agents
- Review transaction and file-management processes
- Understand how the office handles contracts, earnest money, MLS updates, closing coordination, and compliance
- Identify urgent gaps
- Clarify decision-making authority
- Establish a regular communication schedule with the broker

DAYS 31–60

- Organize calendars and workflow responsibilities
- Create or revise transaction checklists
- Develop a consistent missing-document process
- Establish routine file-review checkpoints
- Create basic onboarding and agent-support materials
- Organize vendor and closing contacts
- Identify recurring questions that could be answered through written procedures

DAYS 61–90

- Finalize core office and transaction procedures
- Provide the broker with an operations summary
- Recommend staffing or technology improvements
- Develop measurable office goals
- Create a plan for agent training
- Establish a repeatable reporting process
- Identify longer-term improvements for brokerage growth

GREEN FLAGS AND RED FLAGS WORKSHEET

GREEN FLAGS

- The broker clearly explains what the position would own.
- The broker recognizes that operations work supports revenue and reduces risk.
- The broker respects Samantha's license and contract knowledge.
- The role includes appropriate authority.
- The broker is open to written procedures and better systems.
- The broker wants someone who can work independently.
- The broker understands the value of transaction and compliance support.
- The broker is willing to discuss salary rather than commission-only compensation.
- The work schedule is primarily within normal business hours.
- Evening and weekend expectations are limited to genuine needs.
- The broker respects confidentiality.
- The brokerage has realistic growth goals.
- The broker is willing to delegate.
- The position has room to grow.
- The broker speaks respectfully about current and former employees.
- The broker is honest about current office problems.

RED FLAGS

- The broker repeatedly suggests that Samantha can "also sell on the side" to make enough money.
- The base salary is low because she has the opportunity to earn commissions.
- The position combines office management, transaction coordination, compliance, bookkeeping, marketing, personal assistance, recruiting, and agent sales with no additional support.
- The broker cannot explain the role.
- The broker wants management-level accountability but will not give her authority.
- The broker expects constant availability.
- The broker regularly contacts staff before work, late at night, or on weekends for routine issues.
- The broker dismisses the need for boundaries because "that is just real estate."

- The broker expects Samantha to use her personal phone, vehicle, or money without reimbursement.
- The broker minimizes compliance or recordkeeping responsibilities.
- The broker wants her to provide confidential information about her current company.
- The broker pushes her to criticize her current employers.
- The broker wants to contact her current employer immediately.
- The broker avoids discussing compensation.
- The broker promises a future raise but will not define the amount, requirements, or timeline.
- The broker describes former staff as lazy, disloyal, dramatic, or incompetent.
- The broker wants someone to fix everything but resists changing any process.
- The position has no path beyond assistant.

MEETING NOTES AND DECISION WORKSHEET

BROKER OR COMPANY

Name:

Brokerage:

Date:

Meeting location:

Who initiated the meeting?

How did the meeting begin?

What did the broker say about the brokerage?

Number of agents:

Office staff:

Transaction support:

Current systems:

Growth plans:

CURRENT NEEDS

What problems is the broker trying to solve?

What responsibilities are not being handled consistently?

What is taking too much of the broker's time?

Are agents submitting complete files?

Is transaction coordination currently available?

Is compliance review consistent?

Is the office growing?

Is staff turnover an issue?

POTENTIAL ROLE

Possible title:

Primary responsibilities:

Secondary responsibilities:

Responsibilities that were unclear:

Would Samantha supervise anyone?

Would you review transactions?

Would you support the qualifying broker?

Would you be expected to sell?

Would you be expected to serve as qualifying broker?

Would the role include personal-assistant work?

WORK ENVIRONMENT

Expected hours:

Evening expectations:

Weekend expectations:

Onsite, hybrid, or remote:

Communication style:

Level of independence:

Decision-making authority:

Office culture:

COMPENSATION

Salary discussed:

Bonus discussed:

Commission expectations:

Benefits:

PTO:

Paid holidays:

Insurance:

License or professional fees:

Mileage:

Professional development:

NEXT STEPS

Did the broker request a resume?

Did the broker request references?

Did the broker request another meeting?

Who will follow up?

Follow-up date:

Is confidentiality understood?

YOUR PRIVATE ASSESSMENT

Did I feel respected?

Did the broker listen to what I am actually seeking?

Did the broker continue trying to turn the conversation toward sales?

Was the role clearly defined?

Would I have enough authority to succeed?

Could I work with this person every day?

Would this position improve my professional life?

Would this position improve or worsen my work-life boundaries?

Does the compensation appear realistic?

What concerns do I have?

What do I still need to ask?

Overall interest level:

- ☐ Very interested
- ☐ Interested, but need more information
- ☐ Unsure
- ☐ Probably not a fit
- ☐ Not interested

FOLLOW-UP EMAIL AFTER THE MEETING

SUBJECT: Thank You for Meeting with Me

Thank you for taking the time to meet with me today. I appreciated the opportunity to learn more about your brokerage, how your office currently operates, and the direction you would like the business to grow.

Our conversation reinforced my interest in moving into a formal real estate operations or office management position. I believe my background in contracts, transaction coordination, file review, MLS management, closing preparation, agent support, client communication, and process improvement could bring meaningful value to a brokerage.

I am especially interested in work that allows me to help create consistency, support agents, protect the transaction process, and give brokerage leadership more time to focus on growth.

Thank you again for the conversation and for keeping my search confidential at this stage. I have attached my resume for your review. I would be glad to continue the discussion if you believe there may be a current or future fit.

Samantha Wilder

256-509-0868

samanthawilder30@yahoo.com

FOLLOW-UP EMAIL WHEN THERE IS NO CURRENT OPENING

SUBJECT: Thank You

Thank you again for meeting with me. I appreciated your honesty about the current needs and structure of your brokerage.

Even though there may not be an immediate opening, I am glad we had the opportunity to talk. I am continuing to explore real estate operations, office management, transaction management, and brokerage administration positions rather than commission-based sales roles.

Please keep me in mind if your needs change or if you hear of another broker, team, closing office, or real estate-related company looking for someone with my background.

I also appreciate your discretion regarding my current employment.

Samantha Wilder

256-509-0868

samanthawilder30@yahoo.com

FOLLOW-UP TEXT

Thank you again for meeting with me today. I really appreciated the conversation and the opportunity to learn more about your brokerage. I am very interested in finding a position focused on operations, office management, and transactions rather than personal sales, and I would be glad to continue the discussion if you see a possible fit. I also appreciate you keeping the conversation confidential for now.

INTRODUCTION MESSAGE FOR FUTURE NETWORKING MEETINGS

Hi, this is Samantha Wilder. I am an associate broker currently working in real estate operations and transaction support in Decatur.

I am quietly exploring my next professional step. I want to remain in real estate, but I am looking for a brokerage operations, office management, transaction management, or brokerage administration position rather than a role centered on personal sales production.

My experience includes contracts, listing and transaction coordination, file review, compliance support, MLS management, closings, agent support, client communication, and office systems.

I would appreciate the opportunity to meet with you briefly, learn more about your business, and hear your perspective on where someone with my experience may fit within the local real estate industry.

Because my current employer does not yet know I am exploring opportunities, I would appreciate your discretion.

REFERENCE REQUEST MESSAGE

Hi, I am beginning a confidential search for a real estate operations, office management, or transaction management position.

I am not looking to build a traditional real estate sales business. I want to use my experience with contracts, closings, transaction coordination, file review, client communication, and brokerage operations in a more formally defined role.

Because my current employers do not know I am looking, I am being careful about references and confidentiality.

Would you feel comfortable serving as a professional reference and speaking honestly about your experience working with me? I would not provide your information to anyone without letting you know first.

I understand completely if you would prefer not to be involved.

YOUR MEETING REMINDERS

- Do not undersell yourself by saying, "I just help with everything."
- Name the work.
- You manage transactions.
- You review files.
- You monitor contracts and deadlines.
- You coordinate closings.
- You support agents and clients.
- You build systems.
- You solve problems.
- You protect confidential information.
- Do not claim to have formally managed employees when you have not.
- Explain the leadership work you have actually performed.
- Do not share confidential production numbers unless you are comfortable that they can be discussed.
- Use ranges and approximate volume when necessary.
- Do not share internal complaints or personal details about your employers.
- Do not hand over your complete working resume. Use the shorter targeted resume.
- Do not agree to a sales-based position because someone tells you operations work can be added later.
- Do not accept a vague promise that the title or salary will improve after you prove yourself.
- You have already spent nearly six years proving that you can carry significant responsibility.
- The next role should not be perfect, but it should be clear.
- Your broker license is a strength, even though you do not want to be the operating broker. It gives you credibility in contracts, compliance, transaction management, and brokerage administration. Your experience supports presenting yourself as an operations partner, not simply an assistant.