

## ***Building Powerful Partnerships through Sharing Services***

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### **share**

*transitive verb*

*a: to partake of, use, experience,  
occupy, or enjoy with others*

*b: to have in common*

*Merriam-Webster Dictionary*

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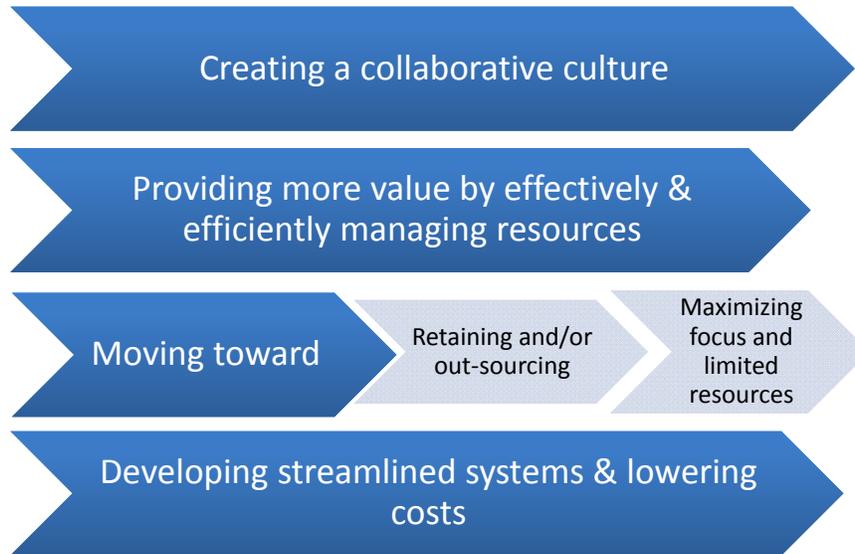
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## What we're *really* going to do

- ✓ Introduce concepts & possibilities
- ✓ Identify the benefits
- ✓ Compare the Core Standards with the Ten Essential Services
- ✓ Practice the Match Game
- ✓ Look at alternative partnerships
- ✓ Introduce assessment tools
- ✓ Integrating core standards and MLS collaboration

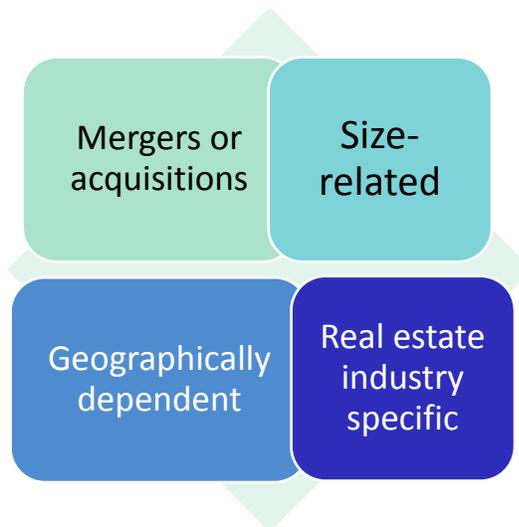
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## What IS “shared services?”



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## Shared Services is NOT ...



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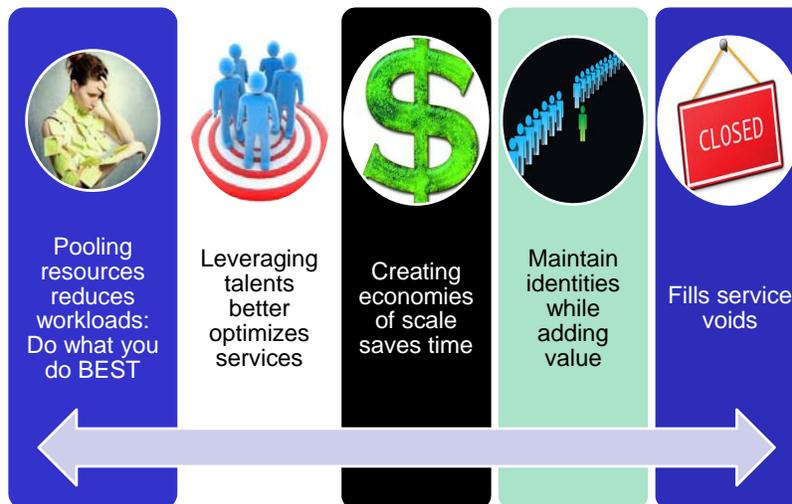


## Exercise

- Take three minutes with a partner to *identify as many benefits to sharing services you can think of.*
- Take notes and be prepared to share some of your ideas when we're finished.

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## Benefits



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## Why is NOW the time?

Members  
expect  
more

Everyone's  
trying to save  
money AND  
provide  
member value  
AND to meet  
or exceed  
NAR Core  
Standards

Duplication of  
efforts and  
costs is  
common

#

***The REALTOR®  
association's CORE  
BUSINESS:  
Helping the member  
become more profitable  
and successful***

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## There's More Than One Right Way!



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## Current Shared Services Partnerships: Your Survey Results

1. Professional Standards (6)
2. Government Affairs (4)
3. MLS (4)
4. Education (3)
5. Partial Admin Support (3)
6. Full AE Support (2)
7. Lock Boxes (1)
8. Location (1)

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## The Ten Essential Services

1. Administrative Services
2. Communications
3. Education
4. Planning and Financial Management
5. Governance and Leadership Development
6. Government Advocacy, Political and Community Involvement
7. MLS and Real Estate Productivity Tools
8. Professional Standards, Legal, and Member Policies
9. REALTOR® Organization, Industry Relationships, and Networking
10. Technology

The services and competencies a REALTOR® association should offer at a proficient level to provide the level of service members have a right to expect.

## The Core Standards and Services Match

1. **Code of Ethics** (PS, Legal, Policies)
2. **Advocacy** (Gov't Advocacy, Political & Community Involvement)
3. **Consumer Outreach** (Gov't Advocacy, Political & Community Involvement)
4. **Unification & Organizational Support** (Admin. Services, Communications, Education, Governance & Leadership Development, Planning & Financial Management, REALTOR® Org, Relationships, and Networking)
5. **Technology**: (Technology, MLS & Productivity Tools )
6. **Financial Solvency** (Planning & Financial Management)

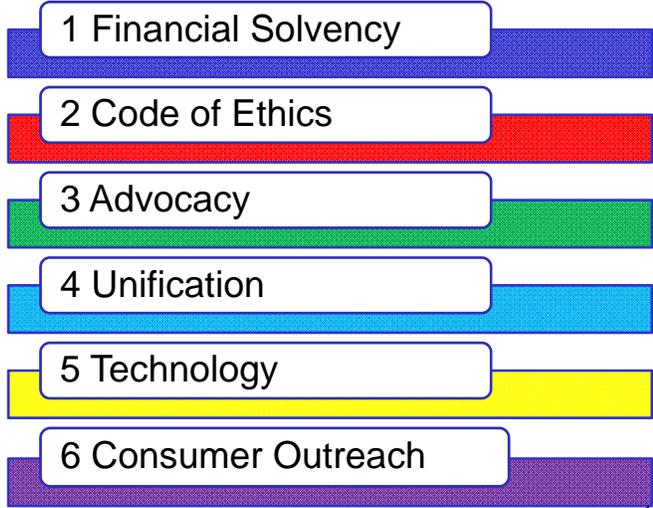
How the Core Standards align with the 10 Essential Services

# What is YOUR Core Standards



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## What are you doing well?



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## Core Standards Sharing Possibilities

### Offer Assistance?

1. Advocacy
2. Unification
3. Consumer Outreach
- Tie 4. Code of Ethics
- Tie 4. Technology
6. Financial Solvency

### Could use some partnering

1. Advocacy
- Tie 2. Unification
- Tie 2. Consumer Outreach
4. Code of Ethics
5. Technology
6. Financial Solvency

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### Exercise

**The Match Game:** How could sharing services with others who are effectively providing a service pair up with those who could improve or begin to offer that service to meet a core standard? Think BIG!

Directions:

*Each roundtable is identified with one of the core standards.*

*BRAINSTORM ways associations can share and see how this can work back home. You'll be able to visit at least two tables; 15 minutes each.*

*Choose a leader and a scribe and put your great ideas on the flip chart*

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*What did you discover?*

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Did you get these?

Didn't have to keep track of membership records? Or administer Code of Ethics enforcement all by yourselves?

Got a per person fee for everyone in an education class, with minimal effort on your part?

Publication was written and produced by someone else, but you got all the credit?

Had a top-notch government affairs director to keep an eye on local and/or state issues impacting real estate and small business?

Shared MLS costs with surrounding market areas, reducing fees paid by brokers and agents.

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## Alternative Partnerships



Who do you know?

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## Alternatives: Exploring your communities

Exercise Directions:

1. Think about the organizations in your communities. Write a list.
2. Discuss with your group:
  - Things you're both already doing and could strengthen or pool funds to do
  - Projects/services could potentially be developed together
3. Note those where you may have a personal contact in your own community. Use the lists later to start a dialogue.
4. Choose a leader and a scribe and put your great ideas on the flip chart.

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*What did you discover?*

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What *are* the possible barriers to success?



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## Getting past the barriers- remember:

- Alliances are not a “foot in the door”
- Separate practical and political issues
- *Expect* agreement
- Ego/Jealousy - - get over it!
- Not a “free ride”
- Obstacles can come from attitude, timing, communication, NOT people

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*Practice  
seeing where  
you are*



**The  
Assessment  
Guide**

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## The Guide and Exercise will help you identify:

What services *should* we be providing, but lack the resources?

What activities have a *low value* to the member?

Are there activities we can/should *stop doing*?

What activities are best done by *someone else*?

What services that have a high value to the member *would* we offer if the resources were available?

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## Let's see how the ABC Association used the assessment process:

1. Completed the assessment exercise
2. Analyzed how much time they were spending on service and which they needed to improve upon
3. Determined which fit best: do best themselves or could be done better with a partner
4. Began exploring sharing opportunities
5. Incorporated their findings in their planning processes

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## Looking Further: Using the Assessment Guide

1. Assess where your association is with the 10 services and note which are related to the Core Standards
2. Estimate the % of resources you allocate for each service area.
3. Brainstorm ideas for sharing.
4. See sample solutions for each area.
5. Integrate your results into planning.

There are checklists, directions, and more. 29

### Shared Services: A REALTOR® Association Partnership Essential Services Assessment Exercise SAMPLE

**INSTRUCTIONS:** Use this assessment exercise to determine if your association is a candidate for shared services in one of the ten essential service areas.

**1** Read the text that describes each of the essential services. The text presents scenarios, through examples, of services that meet expectations, could be improved, or could be enhanced or shared with other associations.

Essential Service Area		
<p>This scenario describes a service situation that needs improvement in order to meet expectations. If this description most closely resembles your association, check off "needs some improvement" below</p>	<p><b><u>Meets Expectations</u></b></p> <p>This scenario describes a service situation that meets expectations. If this description most closely resembles your association, check off "meets expectations" below.</p>	<p>This scenario describes a service situation that <b>exceeds expectations</b>. Services could be enhanced through sharing, or services could be offered to other associations. If this description most closely resembles your association, check off "Meets expectations, but could benefit from shared services" or "Could offer shared services to other associations" below.</p>
<p>Needs some improvement      Look for opportunities to share</p>		
<p>Approximately what percentage of direct and indirect (staff) resources are allocated to this service area? _____</p>		
<p>Ideas for shared services (What, and how, could services be shared in this area? Which associations or organizations might be able to provide, benefit, from shared services?) _____ Write yours in this space _____</p>		
<p><b>Shared Services Solutions:</b> Examples of solutions will be provided in the shaded area.</p>		

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## 2 Evaluate your association's services.

### How well does your association perform this function?

Check off the appropriate response based on the scenario that most closely resembles your association.

- Meets expectations
- Needs some improvement and could benefit from shared services
- Could offer shared services to other associations

Example: ABCAR: p. 23

**Ideas for Shared Services:** Note your ideas for shared services solutions.

**3 Agree upon what percentage** of the association's resources (direct and indirect) are allocated to this service area. This will assist the association in determining if their resources are being allocated according to their priorities.

## 4 Review and compare responses

After completing the "check-off" rating for each essential service area, review your responses and, if working with a planning team, compare responses with those of other team members.

## 5 Categorize and integrate into planning

A. Based on the exercise responses, categorize service areas into one of three categories.

- Meets expectations
- Needs some improvement and could benefit from shared services
- Could offer shared services to other associations

B. Integrate the categorized service areas into the Association's planning. For example, if a service "needs some improvement," plan action steps to achieve a level of service that "meets expectations." If a service area could be shared with other associations, plan action steps to communicate with other associations about your association's shared service capabilities.

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Let's give this a try: Go to the Exercise in your **Assessment Guide**. (pp. 8-9)

Exercise

1. Agree with your partner which one or two essential service areas to use for this exercise.
2. Separately complete Steps 1-3 in the Assessment Exercise for each core standard/service area.
3. Complete Steps 4 and 5 together.
4. List any partnering ideas for this service.
5. List any other association or organization you could partner with on this service (that you may have discovered today).

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## What to take home with you

1. Be a hero in your state!
2. Share what you learned about sharing ideas with others.
3. Talk to your Board of Directors about the benefits of partnerships.
4. Get serious about taking necessary steps to share with others....



Your Assessment Guide provides many “selling” points!

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### Steps to take at home

1. *Review the example (ABCAR) for ideas.*
2. *Identify what services you want to outsource or partner and **why**.*
3. Organize and package your plans.
4. Develop measurements to assess your success.
5. Present the rationale to your board of directors.
6. *Identify the associations with the complementary capabilities.*
7. Develop and refine your proposal for approaching possible partners.
8. Negotiate fees and agreement terms.
9. Communicate the benefit to the board and members.
10. Evaluate the agreement and make improvements.
11. Be open to future shared service possibilities.

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## What do you think?

What did you like about today?

Do you have concerns about what to do next?

What more might you need to know or find out about?

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## Want more Info, Tips & Tools?

- <http://www.realtor.org/ae/manage-your-association/shared-services>
- Your state association resources

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