

Interview Guide: Purple Compass Transaction Coordinator

Characteristic	Description of Attribute / Questions	Point Value	Candidate's score / response
Attention to detail	<p>Accuracy, correct, orderly, detail management, priorities</p> <ul style="list-style-type: none"> How do you keep track of your own appointments? Can you show me how it works? How do you determine your priorities on a busy day? Tell me about a large project / hardest lesson? When you take on a new project, what is the first thing you do? Ability to transform a contract to a check list 	60	Pts: Notes:
Software skills	<p>Capable across many platforms</p> <ul style="list-style-type: none"> In which of the Microsoft Office components are you most skilled? What's the most sophisticated use you have made of MS Excel? Tell me about your experience with the Google platform. 	50	Pts: Notes:
Even tempered	<p>Well balanced, even keeled, not overly emotional</p> <ul style="list-style-type: none"> Tell me about a conflict situation with a teammate on a team or project. How did it get resolved? What do you do to release stress? Tell me about a situation in which you lost your temper. When someone loses their temper, what is your typical approach? 	50	Pts: Notes:
Communication skills	<p>Writing, expressing, instructing</p> <ul style="list-style-type: none"> When giving instructions, how do you ensure that the receiver has a clear understanding of what you want? Which would you choose: writing a 1000 word research paper or 15 minute presentation to the faculty? Why? If you needed to have a difficult conversation with your supervisor, how would you prepare? 	40	Pts: Notes:
Receiving feedback and instructions	<p>Ability to take instruction, feedback, think critically</p> <ul style="list-style-type: none"> How do you like to give feedback to someone you manage? What is the best interview question you've been asked? What was your philosophy of taking notes in class? 	40	Pts: Notes:
Relationship building	<p>Empathetic, personable, friendly</p> <ul style="list-style-type: none"> As you think about your best friend, what is the quality that you most admire in them? Please describe your leadership strategy in 3 words. "If 1 is an introvert and 10 is an extrovert, I'd give myself a ___." Why? The best boss I've had is ___ because ___ 	30	Pts: Notes:
Details	<p>Auto, hours, license</p> <ul style="list-style-type: none"> Do you have a FL RE license? If not, willing? Is your car suitable for errands / delivery? How flexible is your personal life in regard to sudden changes in your work hours / work demands? Non-smoker 	30	Pts: Notes:
Totals	Total points	300	

Job Title: Transaction Coordinator
Job Location: 135 Blossom Boulevard
Job Classification: Regular, Full-Time; Non-Exempt Employee



Company Description: Purple Compass CRE Advisors is a 20-year old commercial real estate brokerage that specializes in the leasing and sale of office buildings throughout central Florida. The company's activities are driven by two very active teams who conduct more than 80 transactions per year.

Job Summary: This position serves as the transaction coordinator for the leasing team, and will work very closely with agents, tenants, landlords, and vendors on a daily basis. A wide variety of responsibilities are involved including actively coordinating the team's proposals, contracts, inspections, billing, marketing materials and social media. This position reports to the Senior Vice President that is the lead producer for the team.

Daily / Weekly / Monthly Responsibilities:

- Manage each transaction from conception through collection of commission.
- Continually maintain accurate pipeline reporting in sync with deal file management.
- Prioritize assignments and effectively resolve emergency situations as needed.
- Prepare various written documents, then process documents through publishing.
- Develop, implement and monitor the team's social media platform.
- Interface with all company personnel and clients on behalf of the company.

Attributes of the successful candidate:

- Acute attention to detail and accuracy.
- Exceptionally strong communication skills, demonstrated in both writing and conversation.
- Demonstrable interpersonal and relationship building skills, including the ability to work effectively with a variety of personalities.
- Proficiency in the Microsoft Office and Google Suite of applications, and an ability to learn other software programs quickly.
- Positive outlook in general; maturity to deal with challenges in an upbeat manner without complaint.
- Ability to organize and manage multiple tasks while working in a fast paced environment.
- Experience in decision making and overseeing day-to-day operations.
- Self-starter with the initiative to work on your own and act as "air traffic control."
- A personal automobile capable of use for company business.
- Desire to thrive in a small, fast-growing company that employs high standards in a relaxed environment.
- A current Florida Real Estate Salesman license is preferred but not required at time of employment. Candidate should be willing to pursue the license if asked.

To apply please send your resume to Blaine Strickland at: blaine@hbs-resources.com, or see the job posting on LinkedIn (Transaction Coordinator / Purple Compass / Orlando, FL

Sample note to “friendlies”

Hi Bill –

Hope all is well. As you may know, Purple Compass CRE Advisors has continued to grow, and now we are in immediate need of a new team member to help us sustain our level of service.

Would you take a look at the attached job description and consider whether you know the right person for this role?

If so, please forward the job description and ask them to apply today by following the instructions at the bottom.

Thanks so much for your help – we really appreciate it!

Blaine

Onboarding Program for Transaction Coordinator

Start Date: November 15, 2017

#	Item	Supervisor / Point Person			Timing	Description / Comment
		Bill	Joan	Sara		
1	Set up company email	X			By 11/18	Ensure email signature (Claire)
2	Set up phone / company directory	X			By 1/18	Understand hold, transfer, long distance
3	Execute hiring documents			X	By 11/15	2 fully signed copies
4	Execute benefit documents			X	By 11/17	Review materials
5	Order business cards			X	By 11/15	Proof carefully / confirm title
6	Request inclusion on company website		X		By 11/15	May need corporate photo
7	Set up computer / printer	X			By 1/15	
8	Visit supply closet		X		By 1/15	Basic supplies for desk
9	Meet leasing team / support			X	By 1/15	
10	Meet reception / PM / Maintenance staff			X	By 1/15	
11	Obtain office / master keys			X	By 1/17	Understand security codes in office
12	Attend leasing team meeting		X		By 1/20	Every Monday morning – obtain recent agenda
21	Obtain existing flyer on each assigned property		X		By 11/22	Also examine CC website listing for each property
22	Finalize property inspection document		X		By 12/22	Develop inspection form, print for each property
23	Visit each assigned property, complete form		X		By 12/15	Convert field notes on each to typing, submit as a bundle to Joan
24	Edit flyer for each property	X			By 12/15	May be assisted by Lindsay
25	Edit website for each property	X			By 12/15	May be assisted by Lindsay
26	Update property sign for each property	X			By 12/15	May be assisted by Lindsay
31	Obtain CRM license / install / train	X			By 12/1	Bill will install, give you training materials
32	Watch CRM videos	X			By 11/22	Expectation: fully proficient in first week
33	Produce CRM reports for Monday meeting (12/11)		X		By 12/11	Each property is a project
34	Review all social media accounts, assess	X			By 11/29	Suggest improvements to each platform
35	Join / attend CREW luncheon		X		By 2/5	Start at website to join
41	Obtain and complete 90-day review form		X		By 2/10	Submit completed form to Jack by 2/10/18
42	Schedule appoint for review with Jack		X		By 3/1	Should occur no later than 3/1/18

Interview Scorecard/ Purple Compass Transaction Coordinator

This table narrates the feedback for each candidate (highly compressed from interview notes), and shows the score calculated for them by Blaine Strickland according to the interview scorecard. These are not comparative ratings; they simply reflect a candidate's skills.

	Name	Attention to Detail / Contract to Checklist	Software Skills	Even Tempered	Communication Skills	Feedback / Instructions	Relationship Building	Details: RE lic Car Flexible Smoker	HBS Description	HBS Point Total / Rating
	Total Pts	60	50	50	40	40	30	30		300
1	Sandra	55 Old school (pad), operations minded, large project experience, mostly residential RE experience.	50 Strong Excel, Word, many Google apps. Salesforce and Quickbooks competent. Minimal Photoshop.	48 Mature, strong role models, resilient (has fired people, has been laid off), values relationships.	40 Cheerleader / drama background, English major, very good eye contact, comfortable in impromptu role play.	35 Seeks to be honest, direct. Deals with issues that arise.	30 Values "brutal" honesty, durable friendships (stress relief: happy hour with the girls), self-motivated.	25 No RE license but willing Car suitable Highly flexible Smoker: quitting, not at work	35 yrs old, single, hardworking local family, significant proj mgmt. and big company experience, software savvy, very pleasant.	283
2	Addison	40 Pad + A/B/C priorities, uses checklists, event manager background, missed appointment.	45 Capable in Excel, Word, Publisher. Knows Google Docs well, social media savvy.	50 Strong customer svc background, hot seat experience, manages emotions well.	40 English major, avid reader, likes to write, engaging, conversational. Able to be direct.	30 Limited manager skills, wants feedback, likes written policy	30 Personable, enthusiastic, background as nurse (caregiver), values family.	28 Active RE FL license. Car suitable Highly flexible Smoker: 2 cigs / day, not at work.	Mid-20s, single, Lives 35 miles from job site. Young but upbeat. Several moves since 2012.	263
3	Jake	50 Pad (my "bible"), oriented toward documentation, high grades from audit, mostly REO experience, 8 yrs w/res firm.	40 Self-taught Excel user (mostly lists), some Google, Photoshop, Publisher use.	48 Experienced at coordinator role, has raised 3 teenagers, get it done mentality.	30 Couple of word usage errors, hands on, direct communicator.	30 "Can get it done faster myself." Kinetic learner, limited mgmt. experience.	22 Father: "don't take crap." Don't be pushed around, be firm. Admires strong characters.	25 Has completed RE pre-license. Car: yes Flexible w/hours, can work at home. Smoker: No	Mid-40s, divorced, kids of 14/18/20. Works 24/7 out of home office, willing to commit full time.	245