

The Vision Course

Executing Your Leadership Vision

NATIONAL ASSOCIATION OF REALTORS®

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Introduction



Introduction

Today is a day where we can start, continue, or possibly restart our discovery of what leadership is. In our work with the Association, or in our companies, or just living our lives, we constantly hear certain buzzwords or catchphrases, so often that they can become almost meaningless because we stop really thinking about what those words mean.

What is disruption?

What is planning?

What is a crisis?

What is care?

What is inclusion?

What is engagement?

And finally, what is inspiration? It is a call for something completely different, it is a call for change. Change means leadership.

It is a call to LEAD!

Course Learning Objectives

After you complete this course, you will be able to:

Understand why positive change is healthy and necessary for an organization to thrive.

Know how to use your leadership skills in order to create an intentional process for inspiring and maintaining change.

Build on your success to create an organizational culture that actually embraces change and continuous improvement.

ELEVATE

- To formulate your vision as a leader, you must understand change.
- To understand change, you must formulate a deep understanding of how to implement change.
- Change can be influenced by many factors.
- Change is not a bad thing.

Introduction: Additional Resources

An Attitude of Excellence

by Willie Jolley

Leading with Emotional Courage

by Peter Bregman

The HOW of Leadership

by Maxwell Ubah

Exceptional Leadership by Design

by Rob Elkington

Creating Mindful Leaders

by Joseph Burton

The Way of the Seal

by Mark Divine

Notes

Welcome to Base Camp

This class will take you on a journey to the summit. And along the path to get to reaching your full potential as a leader and unleashing the full potential of this organization, we will talk about creating a vision, identifying your leadership style, the importance of leaders as teachers and mentors in the Association, and vulnerability. We will touch on the all-encompassing Holy Grail of member engagement, and the importance of leaving this organization better than you found it and making sure that it continues to be better and better by looking to the future. We will talk about ascending to the highest levels of leadership in this Association.

Every time we take a new step, learn a new skill, or make an improvement, it is a change. And it's not change for the sake of change. It's change to make this organization better. Change is not a bad word. Change is something that we do every day. Every day we get to choose whether or not we're going to change and grow, or change and fade away.



Notes

In today's class we are going to hear from several people with different backgrounds and experiences in the REALTOR® organization who will present a variety of concepts on leadership. We are going to share ideas on what it takes to create an amazing organization, things that you can do as the leader of the organization, and ways that you can build your team to develop and maintain the best organization.

We're hoping that after today you can understand why positive change is healthy, and indeed necessary, for an organization to thrive. You will know how to use your leadership skills, and will learn a deliberate, intentional process for inspiring, implementing, and maintaining change. And the big prize, the ultimate goal, is to build on your success to create an organizational culture that actually embraces change and continuous improvement.

This class is built on the metaphor of a journey into the mountains and will take you all the way to the summit.

A Call to Lead

What is one word that describes you?

What do you want people to say about your leadership style?

Dive Deeper

What is something you want to do in the next 365 days to improve your leadership style (other than taking this class)?

What is something you want to do in the next 90 days to improve your leadership?

Course Learning Objectives

After you complete this course, you will be able to:

Understand why positive change is healthy and necessary for an organization to thrive.

Know how to use your leadership skills in order to create an intentional process for inspiring and maintaining change.

Build on your success to create an organizational culture that actually embraces change and continuous improvement.

Let's talk about change, the concept that underlies everything we will cover in this course. Remember, every time we take a new step, learn a new skill, or make an improvement, it is a change. And it's not change for change's sake, it's change to make this organization better. Change is not a bad word and shouldn't be a scary word. Change is something we do every day. And every day we get to choose whether we are going to change and grow or not change and wither.

Let's clarify our terms:

Change = make or become different.

Growth = the process of developing or maturing physically, mentally, or spiritually.

Innovation = make changes in something established, especially by introducing new methods, ideas, or products.

So, we know that change happens, but what drives change?

New Rule

Legislation

Technology advances

There are several different things in our organization which can drive change. One is a reaction to an outside event. The one we most commonly think of is a crisis when something has happened that was unexpected. It may be simply something that has happened from an outside organization or outside entity that you did not expect. Core standards was an example when the National Association of REALTORS®, along with the members, passed a plan to hold us more accountable to each other. We collectively decided to raise the bar for our organizations. For some this seemed unexpected, for many it seemed long overdue. But it was certainly an outside event that caused every single REALTOR® association to change.

One simple piece of legislation can change our industry overnight. If tomorrow your city council, your state legislature or Congress passes something that impacts real estate or even Association management overnight, we will be forced to react to that crisis or to that change like we never have before. Just think about how our worlds would turn upside down if a sales tax on services is enacted in your state.

Technology advances are certainly a third way that we can change and will have to change to an outside event. We will look back on the quarantine period and realize that everyone overnight adopted virtual tours, virtual showings, in virtual meetings. This was a crisis, but it was another opportunity for change in leadership. There was not a single piece of technology that was invented that was new, but for the first time we embraced things we may not have embraced before. Had we done it sooner, the learning curve would not have been as extreme. What is out there in your environment that you know you should be embracing, you know you should be figuring out, but you haven't because of time or sometimes simply lack of guts to move to the next level?

LEADERS- Why drive change?



Visionary Leaders

Drive Change

Share Vision

Organizations Flourish



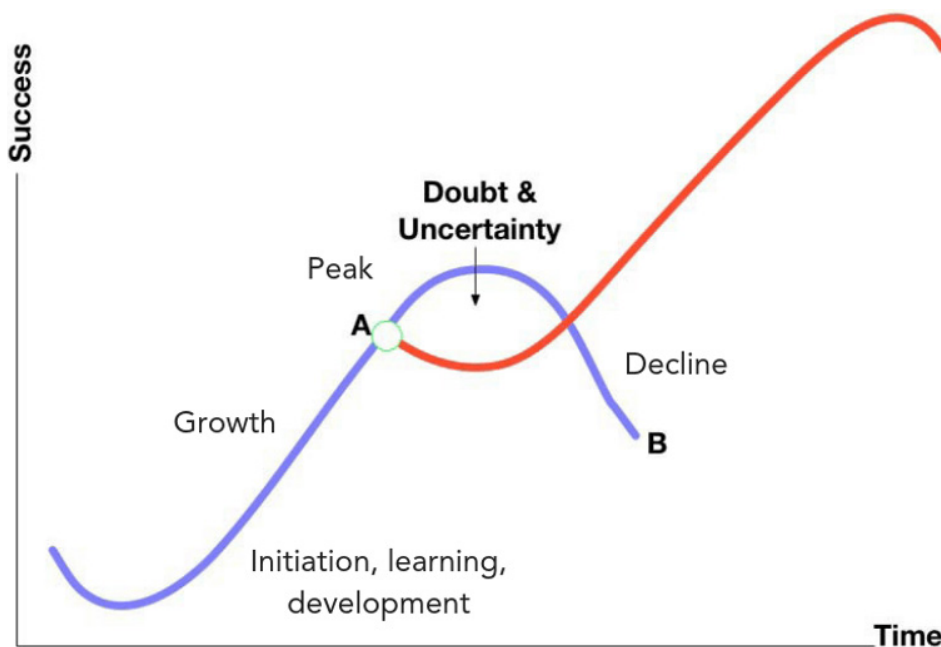
Effective Leaders

Seize Opportunities

Identify Crises

Make Changes

Why take on change when all is going well?



“Change should not precipitate fear.
It should precipitate discovery, empowerment
and teamwork.”

Ron Phipps

NAR Past President

Breakout: Organizational Change

Think of an organization that undertook change. It could be yours, or another REALTOR® Association, or any other organization.

What precipitated the change effort?

Did the change effort succeed or fail?

What contributed to success?

What lessons can be learned from failure?



The Why

The Why

Whether change is created from a crisis, a vision, or having an ongoing culture of success and improvement, no one can deny that change can be painful. We always need to have a compelling answer to the question: “Why are we doing this?” or “What is the problem we’re trying to solve?”

And that in turn should cause us to ask the even more fundamental question: why we even exist?

People like Martin Luther King Jr., Steve Jobs, and the Wright Brothers may have had little in common, but they all started with WHY. They realized that people won’t truly buy into a product, service, movement, or idea until they understand the WHY behind it.

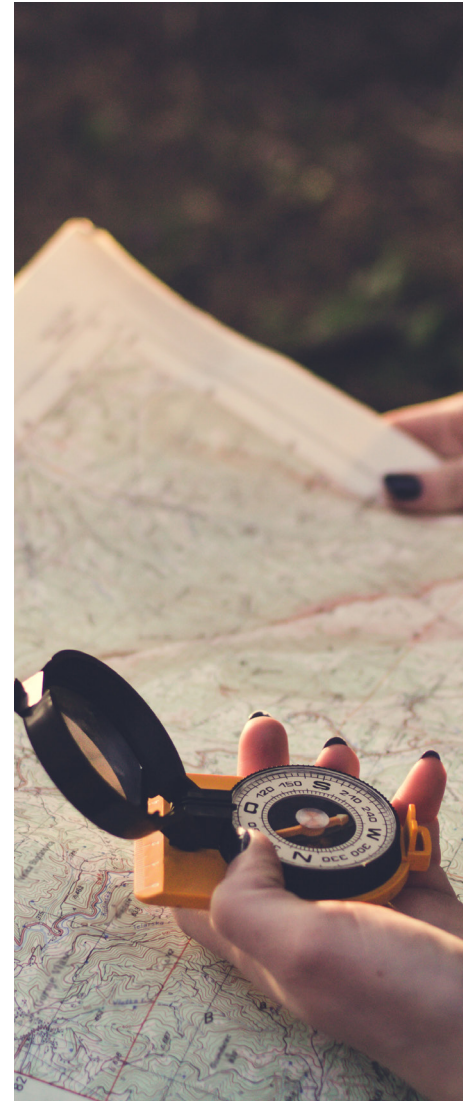
Our members and many times our own elected and selected Association volunteers and members won’t truly buy into ideas until they understand the WHY of the REALTOR® Association. So, why does the REALTORS® organization exist? To advocate? To legislate? To provide legal assistance? To protect private property rights?

All these things are what we do.

If you can really focus in on that one question, it can help you develop your vision, your communication, your talking points, and center the whole vision and planning process for the whole organization.

What do we DO?

WHY do we do what we do?



The WHY Learning Objectives

After you complete this module, you will be able to:

Identify why you do what you do as a leader.

Understand the connections between your WHY and the organization's WHY.

ACCELERATE

- Know the difference between what we do and why we do it.

The Why: Additional Resources

The Culture Code

by Daniel Coyle and Will Damron

Leadership Roles and Responsibilities

content on nar.realtor

Association Operations

content on nar.realtor

Lead Simply: How to Create that Special Team of People

by Sam Parker

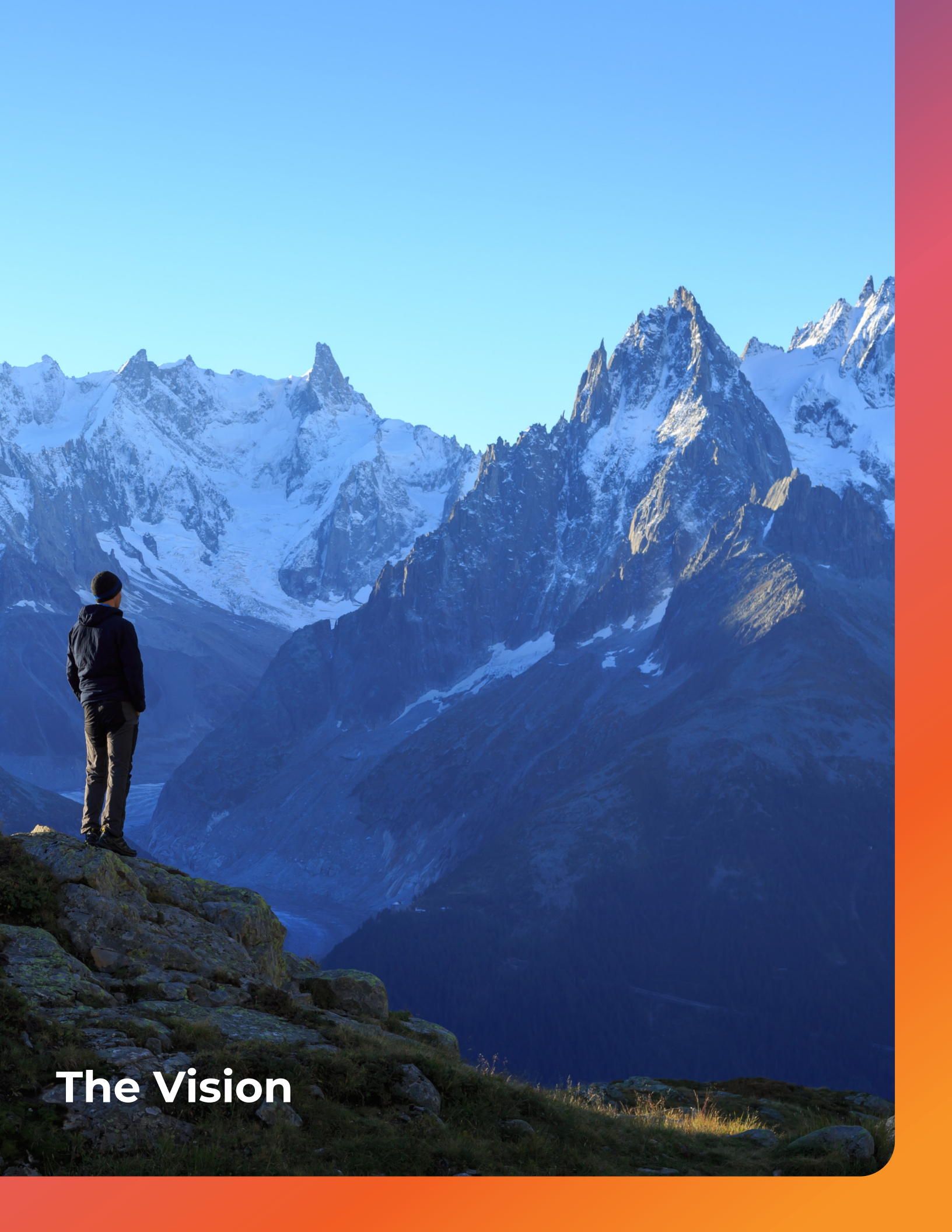
Commitment to Excellence

journey on www.C2EX.realtor

Leaders Eat Last

by Simon Sinek

Notes



The Vision

The Vision

You need to create a vision that is realistic. The vision should inspire others to follow you and join in the journey to success!

A vision cannot just be an idea. People cannot respond to ideas. They rally behind them, and they get excited for them. But the vision isn't actionable until the idea is on paper. Ideas need to transform into tangible plans.



The Vision Learning Objectives

After you complete this module, you will be able to:

Understand how a clear vision can create a pathway that leads your Association down a road of dynamic growth, engagement, and prosperity through effective leadership.

Explain why some Associations move from good to great when they have a clear vision of where the Association is today and where it can be tomorrow.

Understand that the vision is not yours.

Create the Vision

A vision statement is inspirational words. We use vision here as a clear plan for an idea to advance the organization around our all-encompassing why.

Your Association with your guidance needs to create a vision that is realistic and inspires others to follow you and be part of the success!

The vision is not yours. You are not Steve Jobs and we are not Apple.

A great example is when the National Association of REALTORS® implemented what we now know as the REALTOR® Party program. The REALTOR® Party concept was created because advocacy continued to get more and more expensive at all levels of the organization, national, state, and local.

It became apparent that many local and state associations did not have the funds or the resources to enhance their advocacy efforts on their own. It was also apparent that when legislation started happening in one part of the country it was bound to sweep across the country and then start to affect other areas.

NAR developed a vision of leveraging our enormous membership numbers, our personal and organizational influence in every county in the country, and the knowledge and passion of our members to create an unparalleled effort of mutual support at all three levels of the organization.

So, the vision recognized that being proactive in addressing issues that impact real estate was going to benefit everyone. But how did we, NAR, create a program that would effectively help stop bad legislation in one place and pass good legislation in another? And how did NAR figure out a way that everyone could benefit at the same time?

The answer was the REALTOR® Party. It was and is a comprehensive program that looked at all of the advocacy components of the Association and partnered with local and states associations to more effectively encourage members to make an informed VOTE, to grow the INVESTMENTS we make in advocacy and protecting our business, and to encourage REALTORS® to ACT more proactively in their communities, versus continuing to be reactive to issues that arise.

This vision was created and then enacted with a dues increase from the board of directors effective 2012. This resulted in many states creating programs and allocating more money to cooperate and participate within the program.

But just building a program doesn't mean that it's going to happen. Not only did the National Association of REALTORS® have to create a vision and build the plan, but that vision had to be embraced and translated down to actionable items at the state and local level.

One of the specific reasons we highlight this program was just because when NAR implements the program the work was just beginning. Then the vision must be embraced by states, locals, and the members on the ground. The REALTOR® Party vision was much larger than just one entity. It had the ability to impact ALL our members whether they knew it or not.

What is the idea?

What is the WHY?

What is the timeline?

What people resources are needed? (staff, volunteers, committee chair, etc.)

What financial resources are needed?

What are the questions the members will ask?

What policies need to be created or changed?

How will we measure success?



Change through vision doesn't always have to be something on a grand scale, such as the REALTOR® Party program. It can be a localized vision for expanded and more meaningful member engagement, or for improving the REALTOR® image in the community.

But regardless of what the vision is, a good vision plan is going to include the reason for the idea; the reason we are expanding or changing our programming for the Association.

Step 1: Identify the Need or Opportunity

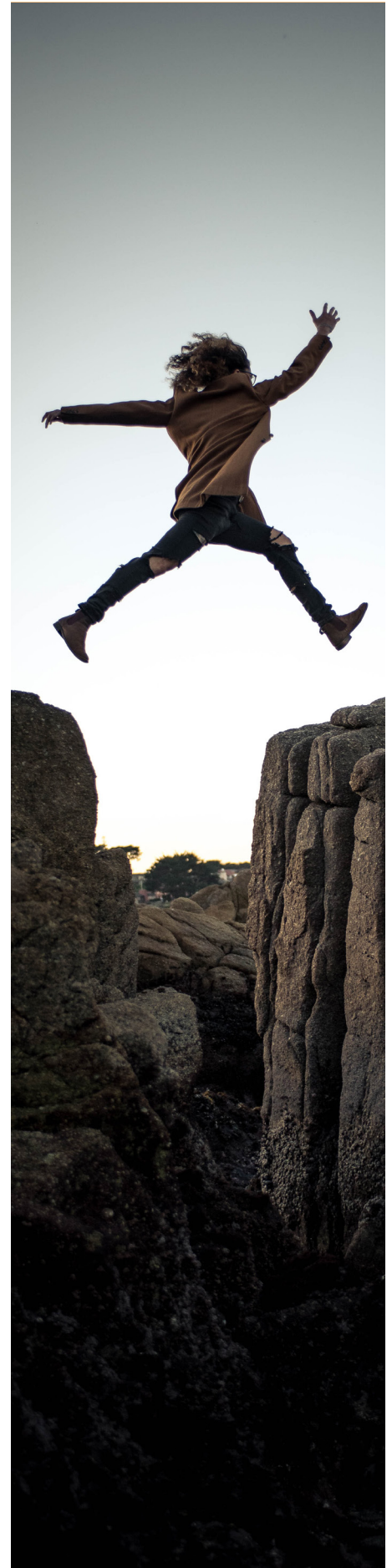
To implement vision-driven change you must identify the need or opportunity and that can be accomplished in several different ways.

- Strategic Plan
- Networking with other associations
- Surveys
- Ideas from staff

Use surveys, interviews, focus groups, case studies and other techniques to support the case for change. Where appropriate, bring in experts or people who have undergone similar changes.

Many times, we think we're pretty good, but just how good are we? If you can spot them there ARE warning signs. Do you have the guts to engage in a systematic review process where you might literally ask legislators in your state, other lobbyists from other organizations or media reporters to tell you what they actually think of the REALTOR® organization? A great question to ask someone is "On a scale of 1-10, how honest do you really want me to be with you?". Your initial instinct might say that everyone says 10.

The reality is many people say 7-12. Some know and are so sensitive that they really don't want to hear the truth. Others say bring it on. I want it all the way. To really do a good analysis of your association you have to have the GUTS to say we want brutal honesty and acknowledge it is for the betterment of the whole and will lead you to a clearer vision.



Step 2: FAQs

Once you've identified the opportunity, then start asking these questions:

- What facts, figures, trends, and data can association staff regularly gather for leadership each quarter?
- How much time should be allocated at each Board meeting to review, analyze, and discuss the data?
- How should the information gathered be used in the Associations' decision-making process?

All along the way in your planning many questions will come up. Think about these questions, write these questions down, and have them ready to present to the membership. Remember you can't just talk about things; you must create things. Keeping track of FAQs or (Frequently Asked Questions) are a great way to make sure that you are providing the membership with information about the vision. If you are asking the question, chances are that several want to know the same information. This is when it helps to have a wide set of perspectives on your change team, so you're hearing questions from all angles, not just the true believers in the proposal.

It's much easier to do when you've tried to answer the questions that you know are going to be on the minds of your members. To facilitate conversation at the state and local levels, NAR created the smart budget document. It was an easy to read format with charts and graphs, in a document which also shows the FAQs. This was supplemented by a website members could use as a resource for more detailed information. As a result, as people ask questions, it is easy to respond by saying "refer to the website or refer to the document." It also helped that all the members of the leadership team had the same talking points and were on the same page in communicating with the members.

Be strategic. Don't let people self-select.

Anything you can do to bring the team together for the collective vision and share that collective vision with the membership is going to help advance the organization and move the ideas forward. NAR even developed a confidential playbook for the leadership team and anyone else who might be speaking on the budget for NAR. It went into even deeper information so that there was a resource for every member who was communicating the initiatives to the member on the street. Consistency in messaging and authentic communication is one of the most important things that you can do when sharing your vision with your membership.

Step 3: Education and Communication

This leads us to the last step of creating and implementing a vision, and that is education and communication. Explain it all to the membership. This should always be in writing, but there are other great collateral you can use to educate the membership on the vision.

Consider live and virtual town halls.

Video can also be a great way to distribute an education piece.

If you can come up with a great FAQ document, then you're going to answer most of the questions ahead of time. You're also going to instill confidence in those who are debating about whether they're going to accept this new vision or accept this new idea. To create buy in you must prove to them that you have thought about the things that they are thinking about. If you need to go out and research and do focus groups, then do it to come up with the best list of questions to show that you are creating the best plan possible.

Not only does comprehensive education need to happen before the group embraces the idea, but it certainly needs to happen even after an idea has been passed or is ready for implementation. The education can't just be before the program is ready for the members, it needs to be continuing and ongoing because people only access information when they are ready for it. Think about the types of ongoing education that can be created for your programs so that at any point in time the information is available to those who need it when they want to have it.

Some ideas could include targeted videos, information on the website, or drip campaigns. There are even associations who are using bots to track when their members need from the Association so they can send information to their members for the reason that they visited or called.

It's time to get super sophisticated about how we educate our members on our products and services when they are ready and need them.



Written Communication



Video Messaging



Town Halls



Before the decision



When the decision is made



When the members are ready for it

Step 4:

“If you can’t measure it... you can’t manage it”.

We must ask ourselves hard questions when it comes to measuring progress and make sure that we have the capacity and capability to measure our efforts.

Should it achieve specific revenue goals?

How many members should be impacted each year?

What does success look like?

When will we pull the plug or sunset if we are not meeting our measurements?

These are all things that should be determined ahead of time and before you launch an initiative, so everyone understands the vision and where we are going. We must be able to measure and we must be able to eliminate and change to a new vision in the future. That is how you create a culture of change.



Should it achieve specific revenue goals?



How many members should be impacted each year?



What does success look like?



When will we sunset if we are not meeting measurements?

DELIVER

- Identify the need or opportunity
- FAQs
- Educate and Communicate
- If you can't measure it, you can't manage it.

The Vision: Additional Resources

“History of NAR”

a video by NAR

Start with Why

by Simon Sinek

Leadership in Turbulent Times

by Doris Kearns Goodwin

Strategic Integration

by Gabriel Eckert and Bob Harris

7 Measures of Success: What Remarkable Associations Do That Others Don't

by ASAE and The Center for Association Leadership

Good to Great

by Jim Collins

Notes



Team Building

Team Building

One of the most important things that we will touch on today is the importance of building a team. We know that today, one in four REALTORS® are a part of a team in the real estate business. This emphasizes the importance of understanding that running an organization and leading an organization is all about team building.

It is critical to understand and embrace the power of the team that you will work with, that you will appoint, and that you will ultimately serve with. The volunteer members need to become a team in order to be productive members of an Association. That all starts with you as a team-building leader.

Team Building Learning Objectives

After you complete this module, you will be able to:

Understand what distinguishes teams from other groups and why building a true team is so important.

Identify the characteristics of a successful team.

Understand the role of the team leader.



When you hear team building, you might first think of bonding exercises such as a trip away from the office. You might think it's something you need to do to humor the boss. You might hope that there's food or alcohol involved to make it more fun. Some of you love these activities, some of you hate them, but regardless there are definite reasons why team building is very important and necessary.

If it weren't that important or if people didn't care about it, we wouldn't find so much literature and so many resources on the concept of team building. In fact, if you Google it, you're going to find over 4 billion results just on team building alone. What the heck? How is that even possible? Further if you look at team building for Association leadership, you're going to find over 373 million results. So, it's no wonder that the largest trade Association in the world is going to devote some time and focus on team building especially when it comes to Association leadership.

There's even a group called The International Association of Teamwork Facilitators. So, it is no joke that everyone wants to build a team. With so many perspectives it's clear that there's not going to be a single right approach to team building, so in this session we're only going to scratch the surface for you to understand team building and how you can work on team building in your own leadership journey.

There is one basic question that you must start to ask why teams? Why is there this emphasis on team building? What is a team anyway?

And most importantly how does a team differ from another group that is trying to achieve something?

Groups:

A group is simply several people who are assembled to work towards a goal. Sounds simple enough, sounds easy enough, but its members may have very little connection to one another, or they may care very little about actually accomplishing the goal, and they may have no interest in the goal itself or the implications.

They were just brought together to achieve a task.

If you think about it, A Board of Directors can be like this. People don't always run for Director, or get appointed to a Board, for purely altruistic reasons. Sometimes, they just get pestered to volunteer and finally give in, but they don't really want to be there. Or, they have a pet peeve subject that they want to address, but they don't really care about any of the other stuff. Or they may see it as a chance to get a staff person fired. Or they may have a personal agenda of shining up their resume for the next step. You may find it hard to believe but this stuff can actually happen.

In order to move from a group into a team they have to embrace common objectives and most importantly a commonly held vision. A team has a sense of itself as a team and understands that it is no longer just a group. Dedication to the quality of its accomplishment becomes important and so does mutual accountability, an investment in the goal and purpose. I happen to think one of the reasons that people like in getting involved in Association leadership is because of the accountability that they have to one another. As you know real estate or any profession or any entrepreneurship or any leadership roles sometimes can be lonely.

Teams:

You really start to feel a sense of community when you start to be part of a team, and not just part of a group. It's why we say that people join the Association and stay with the Association and come back to the Association because of the "family concept," but what we really mean is they are part of a team that they know is dedicated to a common goal in a common sense of purpose.

So, what earns the right to call your team a high performance team? Not just a team but a commitment to one another for high performance. To ramp it up to that type of level it takes a commitment from the members to the personal growth of others success as well. Not just their own.



A commonly-held vision.



A sense of itself as a team.



Dedication to the quality of its accomplishment.



Mutual accountability.



Investment in its goal and purpose.

Plan Your Retreat

What will you do?

What are the goals of your retreat?

What subjects will you cover?

What activities will you cover?

Other Notes:



When does a team thrive?

So how does all of this relate to REALTOR® Association leadership?

Well all of this is important and most of all teams are critically important when there is organizational crisis. Teams are critical to the formation of organizational vision. And of course, teams then establish a continued commitment to organizational culture.

Teams don't form and thrive in a vacuum. Everything you're learning in this course goes into building a great team.

Teams are going to thrive when there's an organizational vision in an expectation of mutual commitment to the success of each other. Let me say that again: Teams are going to thrive when there's an organizational vision in an expectation of mutual commitment to the success of each other. And so therefore as a leader, part of your role is to help create, promote, and maintain the vision and the culture throughout successive years of leadership.



DELIVER

- A group is different from a team.
- Teams need ground rules.
- You have a key role as the team leader.
- Team building needs to have a purpose.
- Plan a team retreat with a vision, purpose and fun.

Team Building: Additional Resources

Working With Teams in Real Estate

Center for REALTOR® Development Podcast on nar.realtor

Steps to Building an Effective Team

article on hr.berkeley.edu

Talking to Strangers: What We Should Know about the People We Don't Know

by Malcolm Gladwell

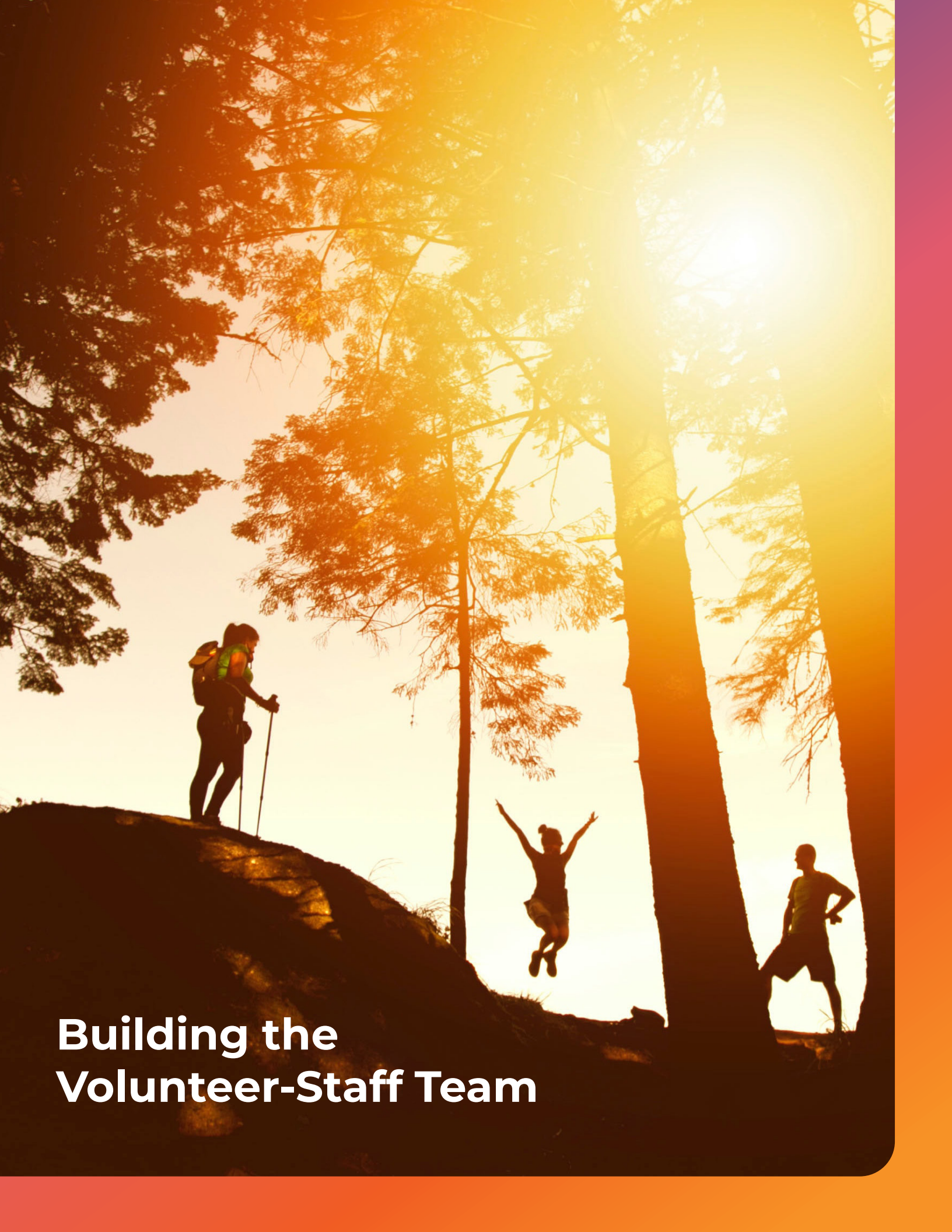
The Culture Code: The Secrets of Highly Successful Groups

by Daniel Coyle

The 17 Indisputable Laws of Crucial Conversations: Tools for Talking When Stakes are High

by Kerry Patterson, Joseph Grenny, et al.

Notes



Building the Volunteer-Staff Team

Building the Volunteer-Staff Team

The success of any structured organization depends on effective leadership. Association volunteer leaders are responsible for determining and guiding the direction and purpose of an organization by setting goals and working with staff leaders to achieve them.

Notes

Building the Volunteer-Staff Relationship Learning Objectives

After you complete this module, you will be able to:

Understand the impact of leadership on an organization.

Uncover five leadership styles, including their advantages and disadvantages to an organization.

Identify five steps to develop yourself as a leader.



Personal Reflection: Identifying Your Leadership Style

Five Core Leadership Styles



Authoritarian



Participative



Delegative



Transactional



Transformational



Authoritarian Leadership



Advantages

- Time spent on making crucial decisions can be reduced.
- Chain of command can be clearly emphasized.
- Mistakes in the implementation of plans can be reduced.
- Using authoritarian leadership style creates consistent results.



Disadvantages

- It kills employee creativity and innovation.
- It reduces group synergy & collaboration.
- Group input is reduced dramatically.
- Authoritarian leadership increases employee turnover rate.



Participative Leadership



Advantages

- It increases employee motivation and job satisfaction.
- It encourages use of employee creativity.
- It helps in the creation of a strong group.
- A high level of productivity can be achieved.

Disadvantages

- Decision-making processes become time-consuming.
 - Communication failures can sometimes happen.
 - Security issues can arise because of transparency in information sharing.
 - Poor decisions can be made if group members are unskilled.
-

Delegative Leadership

Advantages

- The group can freely utilize their skills, competence, and experience.
- Innovation & creativity is highly valued.
- Creates a positive work environment.
- Offers support and advice when needed, but the group is able to make their own choices.

Disadvantages

- There may be confusion over roles in the group.
- Can create difficulty to adapt to change.
- May be a poor choice in situation that require quick decision-making or where group members lack the skills to succeed.
- Can lead to a lack of accountability, missed deadlines and a low commitment to the group.



Transactional Leadership



Advantages

- Leaders create specific, measurable, and time-bound goals that are achievable for the group.
- Rewards and punishments motivate the group.
- It creates a system that is easy to implement for leaders and easy to follow by the group.
- Employees can choose reward systems.



Disadvantages

- Innovation & creativity is minimized.
- Empathy is not valued.
- Group members must be monitored to ensure expectations are met.
- It creates more followers than leaders among the group.



Transformational Leadership



Advantages

- Places high value on vision.
- High morale of the group is often experienced.
- Uses motivation and inspiration to gain the support of the group.
- Places high value on relationships.



Disadvantages

- Leaders can misguide the group.
- Consistent motivation and constant feedback may be required.
- Tasks can't be pushed through without agreement of the group.
- Sometimes lead to the deviation of protocols and regulations.

Improving Volunteer and Staff Relations

Respect and Communication

Respect

- Respect comes from appreciating the unique role that each person has in the organization and giving adequate feedback and direction.
- The AE is the essential pivot point for successful implementation and execution of the vision, mission, strategic goals, and policies set by the Board of Directors.
- Leadership must be clear on expected outcomes and performance by the AE on executing on that vision.
- This means ongoing evaluations – not just once a year and it means listening and respecting different viewpoints.

Communication

- Communication is critical to ensure everyone is committed to the same goals as the year advances, new information presents itself, and resources and/or situations change.
- Communication between volunteer leaders and the AE should be regular and ongoing.
- Remember...No one likes surprises, so keep each other informed on any critical issues related to leadership, staff, membership, organizational matters, finances, external issues, etc.

Volunteer Sickness Syndrome

Volunteer Symptoms

- **No Respect**
Leadership avoiding annual reviews or not taking them seriously.
- **No Processes**
Not having a systematic AE review process.
- **No Communication**
Not communicating regularly with the AE on matters of importance.
- **No Gratitude**
Not showing gratitude for the staff and AE for their accomplishments.
- **No Presence**
Not attending training sessions or professional development opportunities to improve their leadership knowledge.
- **No Engagement**
Not engaging with the state and national REALTOR® Associations for information and involvement.
- **No Reporting**
Not providing progress reports as they relate to the mission, vision and strategic goals of the Association.
- **No Fairness**
Not engaging the leadership team, but only specific members.
- **No Engagement**
Failure to engage with the real estate community beyond the Association and the leadership.
- **No Guidance**
Not guiding the volunteer members by providing and pointing out resources that are available to them.
- **No Network**
Not engaging with the state and national REALTOR® Association for information and involvement.
- **No Empowerment**
Not hiring or empowering other staff members to shine and service the Association.

Identifying Your Leadership Style:

Additional Resources

Dare to Lead

by Brené Brown

All Hands on Deck

by Peter J. Boni

“How Diversity Makes Teams More Innovative”

Ted Talk by Rocío Lorenzo;
video on Ted.com

The Go Giver

by Bob Burg and
John David Mann

The Go Giver Leader

by Bob Burg and
John David Mann

NAR Leadership Summit Videos

collection under “Professional
Development” on nar.realtor

Notes



Vulnerability



Vulnerability

Many times, communication becomes sterile because we are trying to be “formal” rather than conveying a more authentic sense of what we want to accomplish. A more authentic or vulnerable approach to communication inspires trust, confidence, and teamwork. That can ultimately lead to change and empowering others to lead.

Authenticity, which is at the core of vulnerability, is also a key value in building trust. When leaders are authentic, they are open and honest about their values, beliefs, and mistakes. They are also willing to show emotion instead of hiding behind a mask. Therefore, it is nearly impossible to be an authentic leader without being vulnerable.

It is through this authenticity and willingness to be courageously vulnerable that teams can flourish and thrive.

Vulnerability

After you complete this module, you will be able to:

Remember that words and conversations resonate with others to inspire teamwork, encourage participation, and spur empowerment.

Understand that the words a leader uses can inspire others to rise or cause others to deflate their sense of belonging and importance.

The importance of being present online and focusing on generational leadership

Linking Authenticity and Vulnerability

Think of someone who is a leader that you struggle to identify with.
Why do you fail to connect?

When do you feel vulnerable?

What do you fear about your leadership route?

Dig Deeper

How do people get to know you?

How do people start to like you?

Why will they trust you?

ELEVATE

- A more authentic or vulnerable sense of communication inspires trust, confidence, and teamwork, which can ultimately lead to change and empowering others to lead.
- Vulnerability leads to innovation both individually & for the organization
- Vulnerability is our most accurate measurement of courage.
- If your members and team are going to embrace you as a leader, they need to know, like and trust you.

Vulnerability: Additional Resources

Everyone Communicates, Few Connect

by John C. Maxwell R. Ridley

Authentic Communication

by Fred Kofman

An Everyone Culture

by Robert Kegan and
Lisa Laskow Lahey

So You Want To Talk About Race

by Ijeoma Oluo

The Communication Problem Solver

by Nannette Rundle Carroll

“The Secret Structure of Great Talks”

TEDx video with Nancy Duarte
on Ted.com

Notes

This is an exercise you can complete at a later date. We wanted to provide you with a template to think through how you communicate with the members of your association, and how they communicate with you.

Take a few minutes to note down what already exists – and think through if any changes are needed in order to better listen to member feedback.

Accelerate and Deliver

List all the ways your Association delivers news and messages to the members:

List all the ways the Association systematically receives information from the members:

List additional ways you can enhance feedback from the membership to ensure you can hear all their comments and concerns:

How will you share this plan with the members?

How much time should be allocated at each Directors meeting to review the data and feedback?

A photograph of two hikers standing on a rocky mountain peak, looking out over a vast, hazy mountain range under a cloudy sky. The hiker on the right is pointing towards the distance. The scene is captured from a low angle, emphasizing the scale of the landscape. The overall mood is one of adventure and exploration.

Teaching and Mentoring



Teaching and Mentoring

As we move through the leadership journey and continue to climb up the mountain, it's critical that we keep the end in mind. By keeping the end in mind, we are creating an amazing vision.

However, if the vision doesn't truly belong to the Association, the other members of the leadership team, and the volunteers of the Association, it simply won't work. The onus of creating a shared vision always exists and rests with you. And to fully develop into an outstanding leader, you must understand that it is your duty to develop rising leaders around you. Many times, rising leaders will wait to talk to you about mentoring when they are at the end of their journey's path. Maybe they have already climbed the mountain. But mentoring and teaching is something that you must do all along the way. It can't be something that you start to do at the end of your journey. You not only have to figure out how to climb the mountain, but you must also bring others along. This includes respecting and listening to those who are trying to guide you.

Teaching and Mentoring Learning Objectives

After you complete this module, you will be able to:

Understand that the most important thing you can do as a leader is develop those around you.

Integrate tenets of respect, purpose, and gratitude into your leadership journey.

Create a plan for mentoring and teaching the rising leaders around you.



Teaching



Mentoring



Guiding

The answer: Focusing on others



Teaching

When teaching leaders, there are 4 steps you can take to best convey information and lead by example:

1

Behavior & Example

Set a good example! Do others see you as ethical, professional, and cooperative?

2

Engaging the Heart

Let's listen to some concepts about teaching that relate to leadership.

3

Presentation & Instruction

Every time you speak is an opportunity to teach and influence. So make it informative and inspiring.

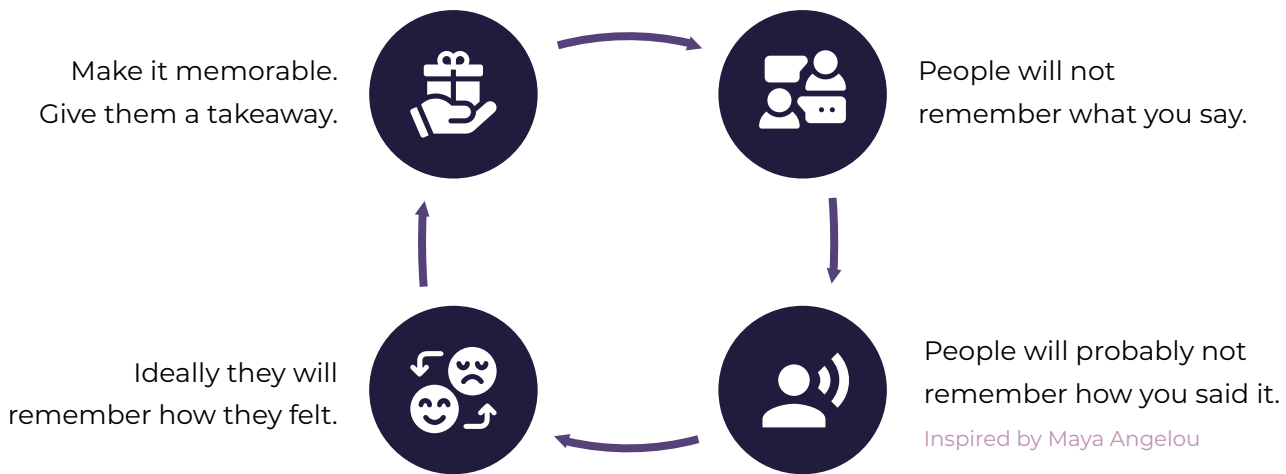
Teaching is like an art

- Make sure there is a takeaway.
- Engage with whom you are sharing the message.
- Have you left them with a different experience or impression?
- Question whether you are being intentional with your delivery and conversation, or not.

"Great minds discuss ideas; average minds discuss events; small minds discuss people."

- Eleanor Roosevelt

Another Footnote



4 The Delivery Vehicle

Don't waste any opportunity to teach using a variety of methods

Be Intentional

- How are you sharing the message?
- Who are you sharing the message with?



Mentoring

"Mentoring requires sharing your heart and sharing techniques. But at the same time, you must engage the heart of others."

LEADERS- Why drive change?



Teaching

Opportunities

Information

Delivery



Mentoring

Heart

Sharing

Technique

Tips for Mentoring:

- Mentoring is about starting with questions, not leading with answers.
- Remember along the journey to always have humility. Leadership is not about you.
- Servant leaders do better and have longer shadows of success. You are replaceable, and mentoring is not about yourself.

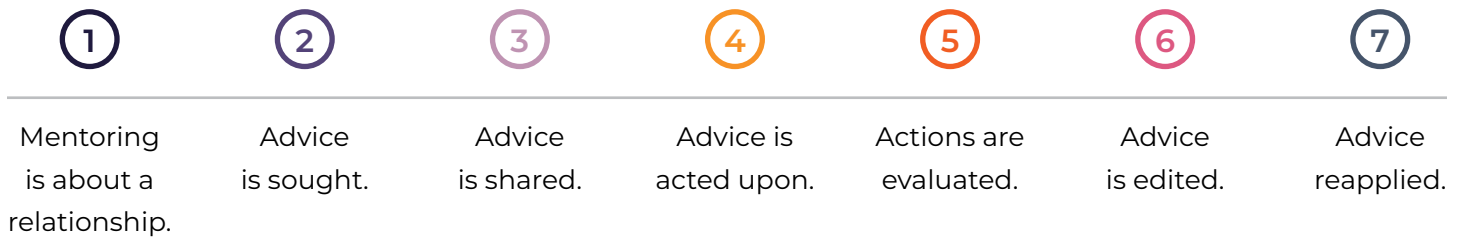
HUMILITY

The essence of servant leadership

A SECRET FOR MENTEES

Mentoring is not a 1-way street.

Mentoring accountability - 7 steps



Teaching and mentoring MUST include discussions of FAILURE.

“Success is not universal, failure is.”

“Failure is owned by the leader, but success is owned by the team.”

Teachers and Mentors seek the WHY.

By uncovering and understanding their WHY, a great mentor encourages mentees to go to the next level and celebrates their growth.

Teachers and Mentors should express GRATITUDE.

Say “Thank you!”

It’s simple, but so impactful.



Guide

How will you express gratitude?

A Reflection on Teaching and Mentoring



Identify three people who have been a great teacher or mentor to you. Write their names:



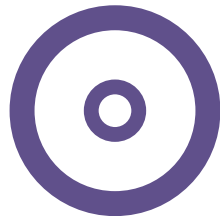
Take a moment to write about why they were great. Have they been impactful along your leadership journey or in your personal life?



Now, write the name of someone who has not been a good teacher or mentor; think of someone who comes to mind who may identify as a leader in your REALTOR® organization, but is not influential:



Create a list of 3 people you can offer to help to become a future leader.



As a leader your most important role is to identify, train, mentor, and guide someone. These people become your successors. And the leaders who teach him enter others have very long shadows of influence. That is the influence that they cast over the Association. If you've been involved or if you think back to leaders at the National Association of REALTORS® or really any leaders in your local or state Association they're the ones who have actively curated future leaders and taken the time to teach mentor and guide them. That's pretty awesome.

DELIVER

- A group is different from a team.
- Teams need ground rules.
- You have a key role as the team leader.
- Team building needs to have a purpose.
- Plan a team retreat with a vision, purpose and fun.

Teaching & Mentoring: Additional Resources

The Elements of Mentoring

by W. Brad Johnson and
Charles R. Ridley

The Mentor Leader

by Nathan Whitaker

A Game Plan for Life: The Power of Mentoring

by James Wooden and
Don Yaeger

The Complete Guide to Mentoring

by Hilary Owen

9 Powerful Practices of Really Great Mentors

by Stephen Kohn and
Vincent D. O'Connell

“The Power of Mentorship”

TedX Talks with Kenny F. Harris;
video on Youtube.com

Notes



Looking to the Future

Looking to the Future



Succession Planning Learning Objectives

After you complete this module, you will be able to:

Establish the importance of cultivating future leaders.

Understand the benefits of succession planning for volunteers and staff.

Identify rising leaders who can navigate a crisis, set a vision, and create a culture.

Self-Reflection: Educating Rising Leaders

Focus on Leadership Development

When you see rising stars, mentor them in all aspects of the Association so they are well-rounded to succeed.

- Understand the needs of the Association or diverse leadership competencies, based upon its Mission, Vision and Strategic Goals
- Commit to building a diverse competency-based leadership team
- Create a leadership nominations process to identify and screen potential leaders for the hard and soft skills needed by the Association.
- Provide an orientation and ongoing leadership training for new and current leaders in order to grow their leadership skills and capacities
- Focus on development: mentor and place them in leadership roles which will advance the Association in service to its members. Create a leadership pool.
- Develop a leadership “team” mentality, which gives new leaders the ability to participate in critical decisions and learn from other leaders on how to address difficult or complex situations.

What activities does your Association have to educate your rising leadership on the Association mission, vision and values?

How do you mentor/teach all rising leaders on the multiple ongoing changing Association trends? MLS, economics, professional standards, advocacy? Not just those who volunteer in those areas?

What other activities can your Association do to encourage your rising leaders continue to be active in their own professional development about the Association?

What specific activities can you do to help encourage and advance professional development for your peers?

A Case Study on Succession Planning

Life intrudes. Sometimes in sudden and unexpected ways, which catches leaders off guard. How would you handle the abrupt departure of one of the officers or the AE? What if the Association had not done any planning for such departures? Would you and the Association leadership be able to ensure that the departure would be seamless, without any negative impacts on the leadership, staff, or members?

The Untimely Intersection of the President-elect and AE Departures from the Association by Ginger Downs, RCE, CAE, IOM

Five months into his presidency of the Western Township Association of REALTORS®, David Woods received two phone calls in one week, which rocked his world.

Prior to that week, David was experiencing a decent year. Member numbers were stable and they were busy with their businesses; tried and true membership programs were being carried out; the small staff seemed to get things done, and the association was getting ready to update its strategic plan for the first time in over 5 years. The Board of Directors was a mix of those who had been on the board for many years, a few new faces with fresh ideas, a director who represented the specialty RE members and chaired that committee, and the 4 officers (President, President-elect, Secretary/Treasurer and Immediate Past President).

The first call was from his President-elect Sue Wilson, whose husband had just accepted a position to run a new division of his company in another state. Sue anticipated she would be in Western Township for the next 3 – 4 months, but she planned on formally resigning in 30 days, at the next Board of Directors meeting, so that she could plan the move for her family. Sue also told Leticia Hernandez, the Secretary/Treasurer, about the move and Leticia said her family obligations would not permit her to move into the President-elect position at this time.

Two days later, the second call was from Western Township's long-term AE, Stuart Tyler, who had accepted a new AE position with another association. He was giving his 60 day notice of resignation – effective immediately. Stuart also had 3 weeks of vacation (which he had to take before he left), so he really was only going to be around



for approximately 5 weeks. David asked Stuart which staff person was best positioned to take over his duties in the interim and Stuart wasn't sure. He had done all the most important tasks himself and hadn't trained any of his staff to step up during his absences. Sure, they could get by for a week or so, but none of them really showed any initiative in learning more.

David was beside himself. Who was going to take over the position of President-elect? The Association did do a half-day orientation each year, but none of the new directors really understood their role, and certainly were not ready to move up. The Association did not offer any other kind of ongoing leadership development for leaders at any stage of their volunteer experience. He might find a candidate from the "old guard", but would any of them really be the right person to lead the Association forward with the new strategic plan? And what skills, experience and competencies would the new leadership need to lead the Association into the future? The Board had talked about adding one Director to serve as an at-large position on the Executive Committee, to expose them to higher-up leadership discussions, but a motion on this didn't pass.

What about the staff? David really didn't have a solid understanding of the scope of Stuart's job or that Stuart hadn't really trained any of his staff to fill in for him. David didn't know how his board would handle finding a new AE and there were only 5 weeks to figure out what to do and how to get by during the interim until they found a new AE. David was certain the leadership was also clueless as to how to go about the AE recruitment process.

David called an emergency Executive Committee meeting and brought them up to speed on both situations. Together, they brainstormed who might be the best candidate on the Board to fill the PE position. Even though he represented the specialty RE sector of the membership (about 10 percent of the membership), they concluded Marc Hayashi had the best skills, experience, and temperament to lead Western Township into the future under the new strategic plan. They call Marc up, and after significant coaxing on the phone, Marc agreed to take on the role. Crisis #1 was averted, although the Executive Committee agreed that the Association desperately needed to identify and train more leaders for the future. Also, they knew they could not go another 5 years between strategic planning sessions. The old plan just didn't fit any more and they did not have a road map for the future.

The Executive Committee then discussed how to address the replacement of Stuart and how they would keep the Association running during the transition. They didn't have any guidelines to help

them, but Sue offered to talk to the state association and NAR the next morning and get some advice. They determined who to recommend to the Board to lead a Search Committee and David asked Stuart to call an emergency Board meeting via Zoom for the next afternoon. He also asked Stuart to meet with his staff prior to that meeting and figure out how they would take on his key duties in the interim, and what projects and tasks could be delayed for a period of time. He asked Stuart to give a detailed report to the Board on the video conference.

The next afternoon, the stunned Board of Directors learned about the untimely intersection of the departure of the President-elect and the AE. They thanked the Executive Committee for working as a team to provide short-term solutions. Without out exception, they recognized the need for more proactive planning and passed a motion unanimously to begin the process of mapping out succession plans for both the volunteer leadership, as well as the AE, immediately upon completing the strategic planning process

What did other group members determine?

What lesson does the case study uncover?

Questions to Consider

1. Western Township did not have a pool of talented and trained volunteer leaders. What might the Executive Committee have done if Marc Hayashi hadn't been willing to step in as President-elect?
2. What skills should the new AE have to benefit the association and guard for this type of uncertainty in the future?
3. How can the volunteer leaders evaluate whether the AE is building overall staff competencies to benefit the association?

DELIVER

- When preparing a plan, be sure to consider both short-term and long-term absences. Have a plan for who will fill your bench.
- Having a plan provides clear lines of duty.
- Building a plan is a long-term process.
- A Leadership Succession Plan requires that leaders commit to spending resources on the execution.
- Be prepared with a Leadership Succession Plan and an AE Absence and Transition Plan.

Looking to the Future: Additional Resources

Checklist for Retiring AEs

on nar.realtor

Effective Succession Planning

by William Rothwell

Succession Planning Checklist for REALTOR® Associations

on nar.realtor

“Succession Exit Planning for Individuals, Teams, and Brokers”

video with Chris Read
on nar.realtor

Local Association Operational Procedures Grid

on nar.realtor

“3 Ways to Plan for the (Very) Long Term”

with Ari Wallach on Ted.com

Notes



Reaching the Summit



NATIONAL ASSOCIATION OF REALTORS®

LEAD.

LEARN. ELEVATE. ACCELERATE. DELIVER.

