



STRUCTURED
TRAINING
DESIGN SYSTEMS

INDUSTRY TRAINING
MASTER SERIES

REAL ESTATE TRAINING MASTER eBOOK

Property Sales, Customer Experience,
Leasing, Negotiation &
Real Estate Operations



PEOPLE



PERFORMANCE



POSSIBILITIES



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WELCOME

Welcome to the Real Estate Training Master eBook

From Property Knowledge to Professional Performance

Real estate performance depends on more than knowing a property. It requires trust, market understanding, disciplined qualification, ethical communication, negotiation, documentation awareness and consistent follow-through. This eBook gives facilitators a structured way to build those capabilities through discussion, practice and workplace application.

Key points

- Use the facilitator notes to prepare and guide sessions.
- Use worksheets and simulations to make learning observable.
- Adapt examples to local law, market conditions and organisational policy.
- Keep customer protection, accuracy and ethical conduct central to every activity.

Facilitator reflection

Which performance outcome would make this resource most valuable to your team?

How to Use This eBook

A Flexible Delivery System

The resource is designed for instructor-led workshops, internal academies, coaching sessions and blended learning. Chapters can be delivered as stand-alone modules or combined into a learning pathway. Each chapter includes a facilitator guide, participant practice and a debrief with transfer planning.

Key points

- **Before delivery:** define audience, baseline, business need and success measures.
- **During delivery:** explain, demonstrate, practise, observe and debrief.
- **After delivery:** assign workplace actions and follow up with managers.
- **Localise:** verify legal, regulatory, tax, contract and disclosure requirements before use.

Facilitator reflection

Avoid treating the book as legal advice. Use approved organisational and jurisdiction-specific materials for regulated matters.

CONTENTS

Sample edition: contents of the full eBook.

Contents at a Glance

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01

PART

Industry Foundations and Professional Standards

IN THIS PART

Chapter 01	The Real Estate Business Landscape
Chapter 02	Property Types and Customer Use Cases
Chapter 03	The Customer Journey in Real Estate
Chapter 04	Professional Ethics and Client Trust
Chapter 05	Local Market Awareness
Chapter 06	Property Features, Benefits and Evidence

CHAPTER 01

The Real Estate Business Landscape

Purpose

Explain how agencies, developers, landlords, investors, buyers, tenants and service partners interact.

Suggested session flow

Stage	Facilitator action	Evidence of learning
Connect	Ask participants for a recent workplace example related to the topic.	Learners connect the concept to actual work.
Explain	Introduce the key concept, model or decision rule in plain language.	Learners can describe the central idea.
Demonstrate	Walk through a short example, including a poor and improved approach.	Learners can distinguish effective practice.
Practise	Run the activity below in pairs or small groups.	Learners produce an observable output.
Debrief	Ask what worked, what was missed and what changes in practice.	Learners identify a specific next action.

Facilitator preparation

- Avoid assuming every market uses the same operating model.
- Prepare a locally relevant example and remove identifiable customer information.
- Explain the task, time limit, expected output and assessment criteria before participants begin.
- Keep advice within professional competence and refer legal, financial or regulated questions to authorised specialists.

Suggested timing

45 to 75 minutes: 5 minutes opening, 10 to 15 minutes concept input, 15 to 20 minutes demonstration and practice, 10 to 15 minutes debrief, and 5 minutes action planning.

CHAPTER 01 · PARTICIPANT PRACTICE

Participant Practice

Participant name:

Date:

Practice task

Map the stakeholder ecosystem and explain each party's priorities.

Work through the task

- 01 State the customer or business need you are trying to address.
 - 02 List the facts you know and separate them from assumptions.
 - 03 Identify the questions or evidence still required.
 - 04 Choose an action and explain why it is appropriate.
 - 05 State how you will communicate the decision or next step clearly.
-

Working notes

Prompt	Your notes
Situation and desired outcome	
Facts and evidence	
Options considered	
Chosen action and rationale	
Next step, owner and date	

Self-check

- ☐ I used evidence rather than unsupported claims.
- ☐ I considered the customer's needs and relevant risks.
- ☐ I stayed within my authority and professional competence.
- ☐ I can explain my next step clearly.

CHAPTER 01 · DEBRIEF & WORKPLACE TRANSFER

Debrief & Workplace Transfer

Debrief questions

- What was the most important decision in the activity, and what evidence supported it?
- Which assumption could have created risk or misunderstanding?
- How might the situation change with a different customer, property type or market?
- What would you do if the information available were incomplete?
- Which behaviour should be repeated in the workplace?

Observation rubric

Criterion	1: Emerging	2: Developing	3: Effective
Customer focus	Need not clearly identified	Some needs explored	Needs and constraints clearly explored
Evidence quality	Claims unsupported	Some evidence used	Facts and assumptions distinguished
Judgement	Options not considered	Limited comparison	Reasoned and responsible choice
Communication	Unclear or pressuring	Generally clear	Transparent, respectful and specific
Follow-through	No owner or next step	Next step partly defined	Action, owner and timing confirmed

Workplace transfer commitment

Within the next seven days, I will practise this behaviour:

I will apply it in this situation:

Evidence that I applied it:

Person who can give feedback:

Review date:

Facilitator note: close by asking each participant to state one observable behaviour, not a broad intention.

CASE 01

A Buyer Who Is Not Ready

Case Brief

A lead requests multiple viewings but has not clarified budget, timing or decision criteria.

Team assignment

Run a discovery conversation that is helpful rather than intrusive.

Information to establish

- What is known, and what is still unverified?
- Who is affected and what does each party need?
- Which policies, approvals or specialist inputs may apply?
- What options are available and what are their trade-offs?
- What communication and record should follow?

Team decision record

Decision area	Team response
Immediate action	
Evidence needed	
Risks and controls	
Communication plan	
Owner and deadline	

CASE 01 · FACILITATOR NOTES

Facilitator Notes

Learning intention

Quality of questions, respectful qualification, clear next step.

Suggested facilitation

- 01 Give teams 5 minutes to read and identify the central issue.
- 02 Allow 10 minutes to compare options and record a decision.
- 03 Ask each team to present its reasoning in 2 minutes.
- 04 Invite another team to challenge one assumption respectfully.
- 05 Close with a principle participants can transfer to real work.

Look for

- Customer needs are explored rather than assumed.
- Evidence is distinguished from opinion and prediction.
- The team identifies authority limits, risks and referral points.
- Communication is clear, respectful and appropriately documented.
- The chosen next step has an owner and realistic timing.

Extension question

What new information would materially change your recommendation, and how would you obtain it?

Scoring guide

Dimension	1	2	3
Analysis	Misses core issue	Identifies issue partially	Frames issue and evidence clearly
Risk awareness	Risks overlooked	Some risks named	Controls and escalation are practical
Customer care	Customer perspective absent	Some attention to needs	Needs, fairness and clarity are central
Execution	No clear next step	Action partly defined	Owner, timing and records are clear

SIMULATION 01

Discovery Interview Sprint

Purpose

Pairs alternate as professional and customer; one observer scores listening and question quality.

Roles and setup

- **Facilitator:** explains the context, timing and boundaries.
- **Participant roles:** act from the brief provided and avoid inventing hidden facts.
- **Observer:** records specific behaviours and evidence.
- **Debrief group:** identifies choices, trade-offs and transfer lessons.

Run of show

Step	Action	Suggested time
Brief	Explain the objective, scenario and roles.	5 minutes
Prepare	Teams plan their approach and key questions.	5 minutes
Simulate	Participants act through the scenario.	10 to 15 minutes
Observe	Observers share examples of effective and risky behaviour.	5 minutes
Debrief	Discuss learning and workplace transfer.	10 minutes

Observer checklist

- ☐ Clarifies the objective and relevant facts.
- ☐ Uses respectful, customer-centred communication.
- ☐ Checks evidence and states uncertainty honestly.
- ☐ Recognises risk, authority limits and escalation needs.
- ☐ Confirms next steps, ownership and timing.

Observer notes

Debrief prompts

- 01 What decision had the greatest impact on the result?
- 02 What did the observer see or hear that supports the feedback?
- 03 What would you repeat or change next time?
- 04 Where will you practise this skill at work?

TEMPLATE 01

Customer Discovery Guide

Use this template as a starting point. Adapt it to your organisation's systems, policy, local requirements and customer journey.

Field	Entry
Purpose of enquiry	
Property or service requirements	
Budget or commercial constraints, where appropriate	
Timing and decision process	
Must-haves and trade-offs	
Questions requiring verification	
Agreed next step	

Quality check

- ☐ Is the information accurate, relevant and necessary?
- ☐ Are ownership and timing clear?
- ☐ Are confidentiality and approval requirements respected?
- ☐ Can another colleague understand the record without guessing?

GLOSSARY

Glossary of Practical Terms

Comparable property	A property used as a reference point for analysis, with similarities and differences considered.
Conversion rate	The proportion of defined opportunities that progress from one stage to another.
Customer journey	The stages and interactions a customer experiences before, during and after a transaction.
Due diligence	The process of checking relevant facts, risks and documentation before a decision.
Handoff	Transfer of responsibility and relevant information between people or teams.
Lead qualification	A structured assessment of fit, needs, readiness and next steps.
Pipeline	A set of opportunities tracked through defined stages.
PropTech	Technology used to support real estate activities and services.
Service recovery	Actions taken to address a service failure and restore confidence.



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