

Sales Associate & Agent's Assistant

Run the machine behind a top-listing agent without dropping a ball.

VERTICAL	LEVEL	DURATION	MODULES
Sales Associates	Foundation	16 hours · 6 modules · 27 lessons	6

Programme overview

Built for the person supporting a lead agent — associate, PA, or licensee-in-training. Covers the operating rhythm, diary and campaign management, buyer qualification, open home execution, CRM hygiene, vendor reporting, marketing coordination, contract paperwork flow, and the judgement calls about what you can say and decide on the lead agent's behalf. Finishes with a practical map from associate to your first solo listing.

What you'll master

- 01 Run a lead agent's diary and campaign calendar without double-booking or dropping a deadline
- 02 Qualify buyer enquiry to the point a lead agent can act on it immediately
- 03 Execute an open home from setup to register to same-day follow-up without supervision
- 04 Keep CRM notes and pipelines clean enough that any agent could pick up the file cold
- 05 Prepare a vendor report the lead agent can present without rewriting it
- 06 Coordinate photography, copywriting and portal uploads to a campaign deadline
- 07 Track a contract from offer to unconditional without missing a compliance step
- 08 Communicate with vendors and buyers on the lead agent's behalf inside clear authority limits
- 09 Manage a lead agent's priorities upward so urgent items never get buried
- 10 Build a 12-24 month plan from associate to running your own listings

Skill focus

- Operations
- Buyer Management
- Compliance

- Marketing Coordination
- Communication
- Career

The syllabus

6 modules · one standard

I. 01 · The associate operating rhythm

5 LESSONS

01	The associate's day, hour by hour	masterclass · 12 min
02	Where your role starts and the lead agent's starts	reading · 11 min
03	The weekly planning cycle that keeps campaigns on track	reading · 13 min
04	Setting up your systems: CRM, diary, task board	masterclass · 10 min
05	Knowledge check: The associate operating rhythm	quiz · 4 min

II. 02 · Diary and campaign management

5 LESSONS

01	Defending the lead agent's diary	masterclass · 12 min
02	Anatomy of a campaign timeline	reading · 14 min
03	Building the vendor touchpoint calendar	reading · 11 min
04	Juggling multiple live campaigns without dropping one	masterclass · 10 min
05	Knowledge check: Diary and campaign management	quiz · 6 min

III. 03 · Buyer enquiry handling and qualification

5 LESSONS

01	The first-response window that wins the buyer	masterclass · 11 min
02	The five questions that qualify a buyer properly	reading · 13 min
03	Handling a vague online enquiry	scenario · 9 min
04	Segmenting buyers in the CRM so nothing goes cold	reading · 12 min
05	Knowledge check: Buyer enquiry handling	quiz · 4 min

IV. 04 · Open home execution and register discipline

5 LESSONS

01	Setting an open home up in 30 minutes	masterclass · 10 min
02	Why every single visitor signs the register	reading · 9 min
03	Running the room without hovering	masterclass · 11 min
04	The same-day follow-up sequence	reading · 12 min
05	Knowledge check: Open home execution	quiz · 4 min

V. 05 · CRM hygiene, vendor reporting and marketing coordination

5 LESSONS

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| 01 | CRM note standards: what a good note looks like | reading · 12 min |
| 02 | Preparing a vendor report the agent can present as-is | masterclass · 13 min |
| 03 | Coordinating photography, copy and portal uploads | reading · 11 min |
| 04 | Tracking the marketing spend against the campaign budget | masterclass · 10 min |
| 05 | Knowledge check: CRM hygiene and vendor reporting | quiz · 6 min |
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VI. 06 · Contracts, authority limits and your career path

6 LESSONS

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| 01 | Tracking a contract from offer to unconditional | reading · 14 min |
| 02 | A buyer pushes you for a decision the lead agent hasn't made | scenario · 9 min |
| 03 | Managing the lead agent's priorities upward | reading · 12 min |
| 04 | What you can say — and what always goes back to the agent | masterclass · 10 min |
| 05 | The path from associate to listing agent | masterclass · 12 min |
| 06 | Knowledge check: Contracts, authority and career path | quiz · 6 min |
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Important — non-accredited training

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For state licensing pathways (Certificate of Registration in NSW, Agent's Representative in VIC, and equivalents), see theagentacademy.org/licensing. Complete your state requirement first — then train with us.