



# THE AGENCY FIELD GUIDE

WATERLOO | OAKVILLE | MUSKOKA | BRANT COUNTY | YORK REGION | TORONTO WEST | HALIFAX | NIAGARA



## REWRITING THE REAL ESTATE RULEBOOK.

**RULE #1:  
NO ASSHOLES**

*We choose character and culture over suits and ties.*

**RULE #2:  
HAVE FUN**

*We have a unique perspective on the world that drives our business,  
fuels innovation and fosters creativity.*

**RULE #3:  
STAY HUNGRY**

*We began as disruptors, and disruptors we shall remain.*

**RULE #4:  
ALL FOR ONE AND ONE FOR ALL**

*When you work with one of us, you work with all of us.*

**RULE #5:  
WE'RE HERE TO SERVE**

*Anticipating needs and going the extra mile is just our standard.*

**RULE #6:  
MAKE SOME NOISE**

*We've elected to stand apart, be ourselves, have our voices heard.*

**RULE #7:  
TELL IT LIKE IT IS**

*We make the headlines black, white and red all over.  
And leave them wanting more.*

**RULE #8:  
MORE OF THE SAME IS NEVER AN OPTION**

*Because following the crowd will take you no further than the crowd.*

**RULE #9:  
DARE TO DREAM**

*We seek out like-minded rebels, who embrace our core standards  
of integrity, collaboration and creativity.*

**RULE #10:  
RULES WERE MEANT TO BE BROKEN**

*Except "No Assholes." We're firm on that one.*

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MEET YOUR TEAM

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# LEADERSHIP

+ OWNERS/FOUNDERS/BROKERS/MANAGING PARTNERS



KATIA BAILEY



STEVE BAILEY



ISABEL PINHEIRO

+ MANAGING BROKER & DIRECTOR OF CAREER DEVELOPMENT



VICTORIA NEIL



# OFFICE LEADERSHIP

## + THE AGENCY WATERLOO REGION



TINA GOLDRICK  
MANAGING DIRECTOR

## + THE AGENCY MUSKOKA



HOLLY CARROLL  
MANAGING DIRECTOR



+ THE AGENCY OAKVILLE



CARLOS CLAVERO  
MANAGING DIRECTOR



CHRISTINA CLAVERO  
MANAGING DIRECTOR



DAVID BAKOWSKY  
MANAGING DIRECTOR



+ THE AGENCY BRANT COUNTY



ISABEL PINHEIRO  
MANAGING PARTNER



VICTORIA NEIL  
MANAGING BROKER



+ THE AGENCY YORK REGION



NIUSHA WALKER  
MANAGING PARTNER



JASSI BAJWA  
MANAGING DIRECTOR



+ THE AGENCY TORONTO WEST



PAUL GREENBERG  
MANAGING PARTNER



JAMES MILONAS  
MANAGING DIRECTOR



+ THE AGENCY HALIFAX



CAIT BANKS  
MANAGING PARTNER



MEGAN LANDRY  
MANAGING DIRECTOR



JAMES GOODE  
MANAGING DIRECTOR



+ THE AGENCY NIAGARA



JODIE ERWIN  
MANAGING PARTNER



STEPHEN CANJAR  
PARTNER & MANAGING  
DIRECTOR



# STAFF MEMBERS

## ADMIN



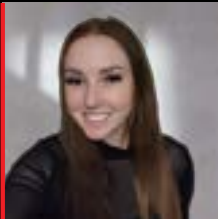
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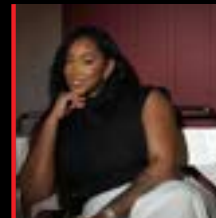
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**ZHARNE TAYLOR**

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# STAFF MEMBERS | MARKETING

PLEASE EMAIL [MARKETING.ONNS@THEAGENCYRE.COM](mailto:MARKETING.ONNS@THEAGENCYRE.COM)  
FOR ANY MARKETING INQUIRIES OR REQUESTS.



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Chief Marketing Account Manager (MAM)

Graphic Design for Digital & Print | Instagram | Facebook

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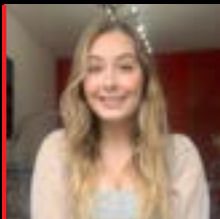


NIKKI VANDERWAL

Social Media Coordinator

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SAVANNAH MOORE

Agent Experience Manager (AEM) | Muskoka

Email Newsletters | TikTok

[Savannah.Moore@TheAgencyRE.com](mailto:Savannah.Moore@TheAgencyRE.com)



NEED ASSISTANCE AFTER HOURS?  
WE'VE GOT YOU COVERED!

**PLEASE EMAIL:**

[AfterHours.ON@TheAgencyRE.com](mailto:AfterHours.ON@TheAgencyRE.com)

[AfterHours.NS@TheAgencyRE.com](mailto:AfterHours.NS@TheAgencyRE.com)

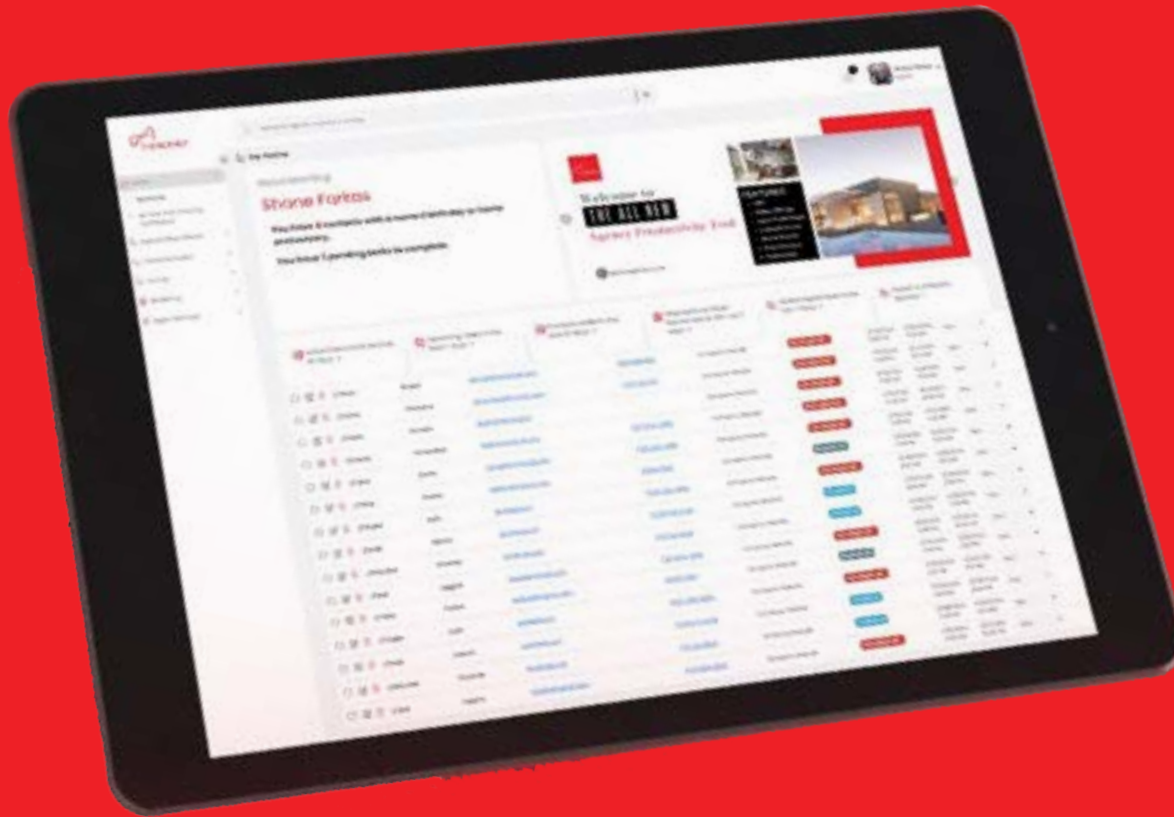
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# AVAILABLE TOOLS & RESOURCES

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# AGENT PRODUCTIVITY TOOL (APT)

The Agency Productivity Tool (or APT) is our new software platform that includes a CRM, listing management system, digital marketing tools, open house registration system, and stay-in-touch tools like drip campaigns and market reports.



ACCESS APT



LEARN MORE THROUGH THE AGENCY UNIVERSITY



# THE AGENCY UNIVERSITY

## LEARNING LIBRARY & VIDEO REPOSITORY

The Agency University is your eternal learning resource. Videos to learn immediately, booklets and step-by-step guides, and whole training modules and learning paths to get you where you want to be.



### CREATIVE CENTER

MARKET YOUR LISTINGS WITH THE LATEST DESIGNS & TEMPLATES.

LEARN NOW

### COURSE CATALOG

YOU ASKED WE DELIVERED COURSES JUST FOR YOU.

ENROLL NOW

### WEBSITE COURSES

WEBSITE LEARNING ON-DEMAND AND WHEN YOU WANT IT.

LEARN NOW

### NEW AGENTS

WE'RE GLAD YOU'RE HERE AND WE HAVE A PAGE JUST FOR YOU.

GO TO PAGE

### GLOBAL SALES

MONTHLY MEETINGS TO KEEP YOU IN THE LOOP OF ALL THINGS AGENCY.

WATCH NOW

### GOOGLE TIME

GET THE MOST OUT OF OUR PLATFORM.

GO TO PAGE

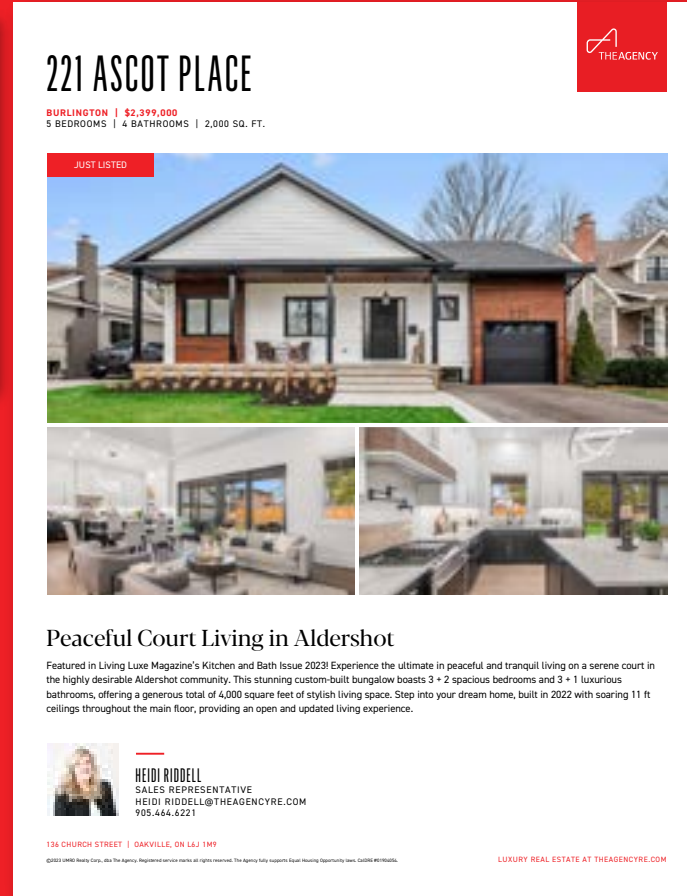


ACCESS THE AGENCY UNIVERSITY



# CREATIVE CENTER

AD | BROCHURE | DOORKNOCKER | LISTING PRESENTATION | LISTING SHEET | SOCIAL MEDIA | STATIONARY | AND MORE!  
Our marketing design platform where agents and staff can create beautifully designed marketing assets for their listing in a matter of seconds.  
The platform is incredibly simple and easy to use all while creating designs that'll wow your clients.



ACCESS THE CREATIVE CENTER



LEARN MORE THROUGH THE AGENCY UNIVERSITY



# FEATURES OF THE CREATIVE CENTER

## OUR LIBRARY OF TEMPLATES IS CONSTANTLY BEING UPDATED

### Available Assets for Digital & Print:

Print Ad  
Brochure  
Business Card  
Buyer Guide  
Comp Report  
Doorknocker  
Drip Campaign  
Floor Plan  
Holiday Card  
Listing Presentation  
Listing Sheet  
Market Report  
Postcard Mailer  
PR  
Recruiting  
Seller Guide  
Seller Report  
Signage  
Social Media  
Stationary  
The Agency Welcomes

## USE THE LEFT SIDEBARS TO NAVIGATE AVAILABLE TEMPLATES

### Filters Include:

Asset Type  
Social: Feed or Story  
Category: Agent or Listing  
Style: Bold, Classic or Minimalist  
Number of Agents: 1-3 or Team  
Number of Listings: 1-8  
Format: Digital or Print

## SYNCING TO CONNECT

Listings in the Creative Center are synced from Connect, making it easier to access listing photos and details.

## THE AGENCY BRANDING

Colours, Fonts and Logos are pre-loaded to ensure each marketing piece follows our brand guidelines.

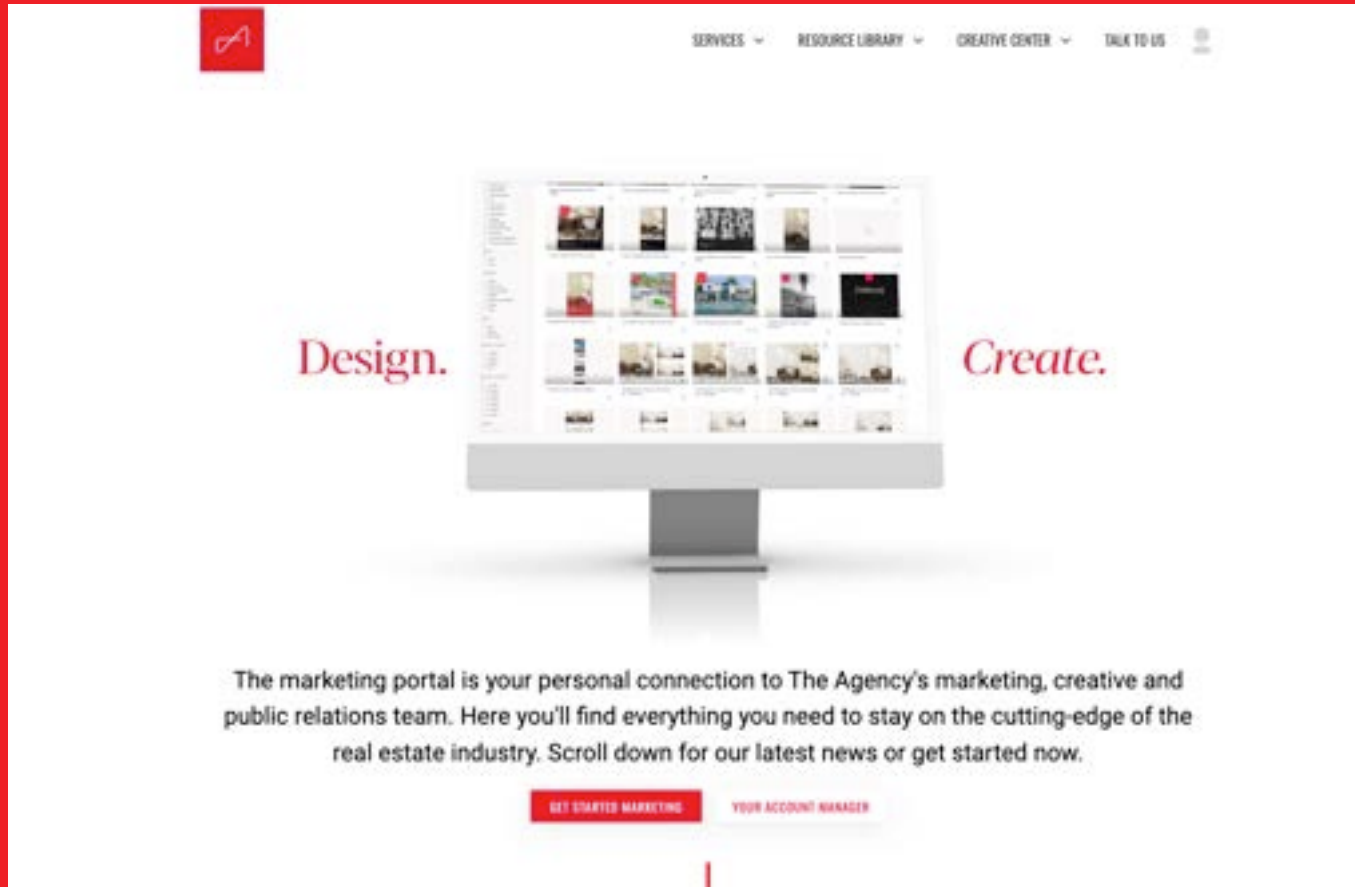
## MY PROJECTS

This is where all of your designs are stored - for your eyes only.

**TIP:** Remember to name each file by opening the design and clicking on the title.

# MARKETING PORTAL

The marketing portal is your personal connection to The Agency's marketing, creative and public relations team. Here you'll find everything you need to stay on the cutting-edge of the real estate industry.



## IMPORTANT LINKS

### SERVICES

- + PROPERTY MARKETING
- + AGENT MARKETING

### RESOURCE LIBRARY

- + PUBLISHED MATERIALS
- + TIPS & GUIDES
- + SOCIAL MEDIA LIBRARY
- + MAGAZINE

## CREATIVE CENTER



ACCESS THE MARKETING PORTAL





# ACTIVEPIPE

## EMAIL CAMPAIGNS

We have integrated ActivePipe with listing and contact data from Connect to easily create email campaigns. These campaigns can be for listings as well as general emails and newsletters to contact groups.

**BUCKLE UP FOR YOUR BEST SUMMER YET**  
The Agency Magazine's Latest Issue is Here!

**READ MAGAZINE**

From Dubai to Big Sky, discover some of the world's most spectacular beach destinations. Browse our featured guide to the beautiful, culturally rich city of Mauritius where residents from Europe's most prestigious tourist destinations, or just your best relaxing getaway, find an eternal vacation of natural bliss around the globe.

Let's make it a summer to remember.  
Come along for the ride.

**On The Move**  
How to Start Planning a Home Renovation

Whether you're updating a bathroom, a bedroom or your whole house, the home renovation process involves a pretty big bill.

BY MARTA STEWART

**Yrbo Just Dropped the 11 Best Vacation Homes of 2023. So It's Time to Start Planning Your Next Getaway**

Has your New Year's resolution been a resolution that your home probably could use?

BY CHRISTOPHER

**SPECIAL SCREENING**

**BUYING BEVERLY HILLS**

WEEKDAY, NOVEMBER X | TIME PLACEHOLDER  
ADDRESS PLACEHOLDER

Join us for a special screening of the first episode of *Buying Beverly Hills*. The all-new real estate series now features The Agency CEO and founder, Maurizio Umansky, his daughters Farrah Brittany and Kiana Umansky and members of The Agency in Beverly Hills.

NO FLU-ID-ONES PERMITTED.

UNTIL THEN, WATCH THE TRAILER FOR BUYING BEVERLY HILLS

**New Listing**  
Elegance in Residential

**3030 South Drive Burlington, ON**  
\$4,598,000

3030-1-888-3372-86-81

Located in an ultra-prestigious location, this home has been an absolute art piece. Featuring traditional styling with modern lines and design, this property offers the true meaning of simplified elegance in full display. With timeless attention to detail throughout the entire residence, quality craftsman found in every single room of the property, both and every room is fit for the pages of your favorite architectural or design magazine. Making use of the most exotic materials in the residential, the residence sits on a 2,200+ sq-ft lot with a new yard that is as private as it is large. Features such as a stunning kitchen with an oversized island, white oak island, solid oak doors, polished nickel hardware, wide plank #1 heart pine, heavy 10" granite, in-slab lighting, 40" iron and country fireplace, near floor office with double oak chair pocket doors, multi-layered paneled walls in the open level, extensive detail woodwork, marble in-floor heat with 80 square feet heating for a full double walking glass over leading from the great room to a covered patio that features commercial grade HERSI strength with composite stone and so-called kitchen area with quartz, grey limestone built-in 50" custom heavy bar stools, fridge and much more. The features of this home are endless. Contact the listing agent for a full list of the features and benefits of this extraordinary home.

[REQUEST A VISUAL TOUR](#)

**The Agency Welcomes**

**Steve Bailey**

The Agency is proud to announce that our sales agent Steve Bailey has joined the growing team of the Waterloo Region Office.

*"I trust people the way I would want to be treated and I always give them my honest opinion—even if it isn't what they want to hear. I believe working with someone to sell their home is an honour and I truly see it as a partnership. I focus on guiding them through the process, managing their expectations and being there for them day or night."*

Steve Bailey, Managing Broker of The Agency's Waterloo Region Office, Waterloo, Ontario West of Park Region office is a seasoned real estate professional who has achieved more than 20 million in sales over his decade and a half long career. Steve's integrity, hardworking and authentic team really has an impact on his clients' lives. Steve has a degree in Business from Wilfrid Laurier University.

After joining The Agency, Steve earned numerous awards for sales achievement and career excellence during his tenure at RE/MAX. In 2014, he was named as the most successful agent in the Waterloo Region and beyond.

Though Steve has a broad working knowledge of the local real estate landscape and can serve a range of clients, he is particularly concerned about being near schools and quality living through the sale of their homes.

Steve and his team have experienced with Habitat for Humanity and he is excited to be working together with The Trust and Credit Foundation of Waterloo. In the free time, he enjoys golfing and spending time with his family.

[CONTACT US](#)



ACCESS ACTIVEPIPE



LEARN MORE THROUGH THE AGENCY UNIVERSITY



# FEATURES OF ACTIVEPIPE

## OUR LIBRARY OF TEMPLATES IS CONSTANTLY BEING UPDATED

### Available Templates:

- New Agent Announcement
- Buyer Needs
- Testimonials
- New & Sold Listings
- Open House
- On The Move
- Experience The Agency Difference
- The Agency Magazine
- Press Announcement
- Buying Beverly Hills
- Happy Birthday
- Warmest Wishes
- Events
- and More!

## CUSTOM EBLASTS

Each eblast can be customized.  
Additional fields include:

- Choice of The Agency Fonts
- Text
- Image
- Multiple Properties
- Page Elements: Line, Button, Spacer
- Media: Social, Video

## CAMPAIGN ANALYTICS

Campaign reports are available for each eblast sent. Metrics include:

- Bounce Rate
- Delivery & View Rate
- Interaction & Click Rate
- Viewed on Mobile or Desktop

## THE AGENCY BRANDING

Colours, Fonts and Logos are pre-loaded to ensure each eblast follows our brand guidelines.

## SYNCING TO CONNECT

Listings in ActivePipe are synced from Connect, making it easier to access listing photos and details.

# REALFORCE

## SELF-SERVE DIGITAL/SOCIAL MEDIA ADS

Automated, targeted digital ads for your listings through Realforce. This tool runs through the APT platform.

The screenshot displays the Realforce advertising interface. On the left is a dark sidebar with navigation options: 'Advertising', 'Order campaigns', 'My campaigns', 'Properties', and 'Log out'. The main content area is titled 'Order campaigns' and '1027 McCauley Rd', with a status indicator 'On the market' and 'No campaign active'. The central focus is a 'For Sale Medium' ad preview. The ad text reads: 'Discover elegance in Hidden Valley! This 4-bed, 3.5-bath gem offers 3,725 sq ft, a chef's kitchen, and a backyard oasis. Listed by: Jill Fusari, DREA 1775608 (CA)'. Below the text is a large image of a house with a 'FOR SALE' sign and a circular profile picture of Jill Fusari. To the right of the preview is a 'Preview and edit' panel with instructions: 'Go through all your campaigns, make sure they look to your liking! (Edit anything from image to text, if everything looks good, continue to next step to see a summary and order your campaign(s)).' Below this panel is a 'Details' section showing 'Price: \$90.00' and a 'View summary' link. At the bottom, a progress bar shows three steps: 'Campaign settings', 'Preview & edit', and 'Review & order', with 'Preview & edit' currently selected. 'Back' and 'Next' buttons are visible at the bottom right.

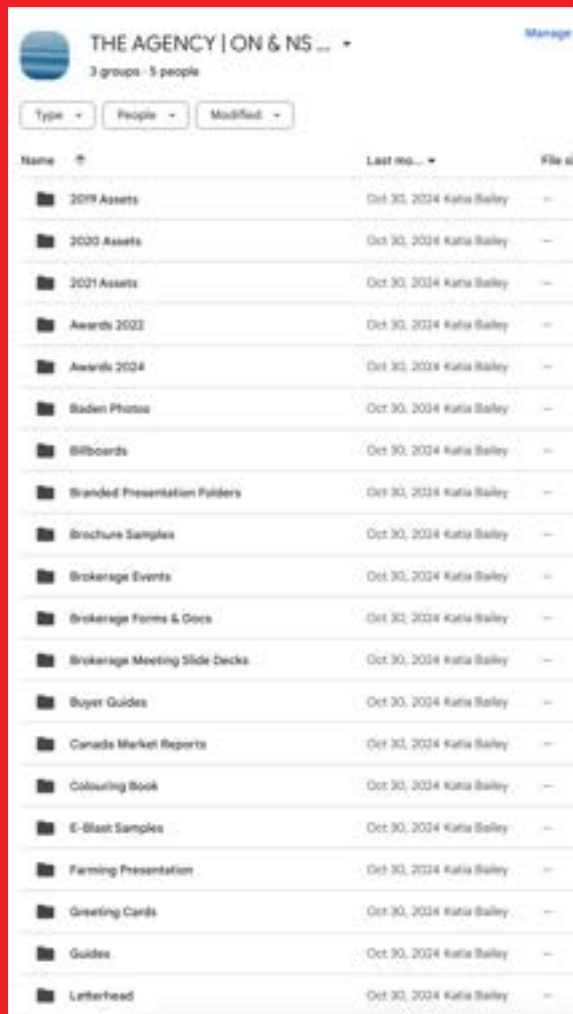


LEARN MORE THROUGH THE AGENCY UNIVERSITY



# THE AGENCY BROKERAGE GOOGLE DRIVE

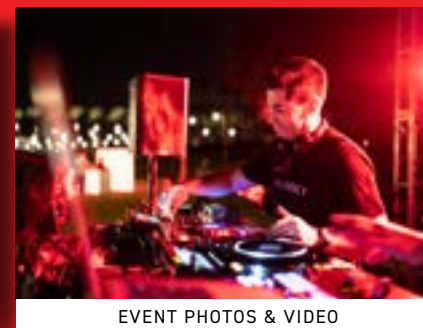
Resource for agents within the Waterloo Region, Oakville, Muskoka, Brant County, York Region, Toronto West, Halifax & Niagara offices.  
*Download the Mobile App for easier access to content.*



Name	Last Mod...	File Co...
2019 Assets	Oct 30, 2024 Kaita Bailey	—
2020 Assets	Oct 30, 2024 Kaita Bailey	—
2021 Assets	Oct 30, 2024 Kaita Bailey	—
Awards 2023	Oct 30, 2024 Kaita Bailey	—
Awards 2024	Oct 30, 2024 Kaita Bailey	—
Baden Photos	Oct 30, 2024 Kaita Bailey	—
Billboards	Oct 30, 2024 Kaita Bailey	—
Branded Presentation Folders	Oct 30, 2024 Kaita Bailey	—
Brochure Samples	Oct 30, 2024 Kaita Bailey	—
Brokerage Events	Oct 30, 2024 Kaita Bailey	—
Brokerage Forms & Docs	Oct 30, 2024 Kaita Bailey	—
Brokerage Meeting Slide Decks	Oct 30, 2024 Kaita Bailey	—
Buyer Guides	Oct 30, 2024 Kaita Bailey	—
Canada Market Reports	Oct 30, 2024 Kaita Bailey	—
Colouring Book	Oct 30, 2024 Kaita Bailey	—
E-Blast Samples	Oct 30, 2024 Kaita Bailey	—
Farming Presentation	Oct 30, 2024 Kaita Bailey	—
Greeting Cards	Oct 30, 2024 Kaita Bailey	—
Guides	Oct 30, 2024 Kaita Bailey	—
Letterhead	Oct 30, 2024 Kaita Bailey	—



BROCHURES



EVENT PHOTOS & VIDEO



MARKETING & LISTING GUIDES



LOGOS FOR PRINT & DIGITAL



POSTCARD SAMPLES



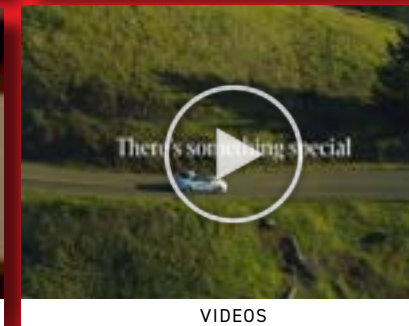
RULES & SAYINGS



SOCIAL MEDIA ASSETS



THE AGENCY FIELD GUIDE



VIDEOS



ACCESS GOOGLE DRIVE





*Our Guides:*

- Brand Standards
- ActivePipe
- AgencyConnect
- Brand Book
- Headshot Guide
- Listing Copy Guidelines
- Personal Branding
- Signage
- And More!



ACCESS GUIDES



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# MARKETING & SOCIAL MEDIA

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+ MARKETING & SOCIAL MEDIA

# DO YOU REQUIRE ASSISTANCE WITH ANY OF THE FOLLOWING?

- Featuring your listings on corporate office accounts (Instagram, Facebook, TikTok)
- Custom social media graphics
- Listing sheets
- Property brochures
- Signage and billboard mockups
- Postcards and client cards
- Presentation materials
- Property eblasts
- Market statistics
- Holiday social media assets
- Branded stationery
- Additional creative assets

Email [Marketing.ONNS@TheAgencyRE.com](mailto:Marketing.ONNS@TheAgencyRE.com) and a member of our marketing team will be happy to assist.



+ INSTAGRAM & FACEBOOK

# OUR LOCAL ACCOUNTS | FOLLOW, LIKE, COMMENT & SHARE!



LOOKING FOR YOUR LISTING OR CONTENT TO BE FEATURED? EMAIL NIKKI AT [MARKETING.ONNS@THEAGENCYRE.COM](mailto:MARKETING.ONNS@THEAGENCYRE.COM)

## *What Can Be Featured?*

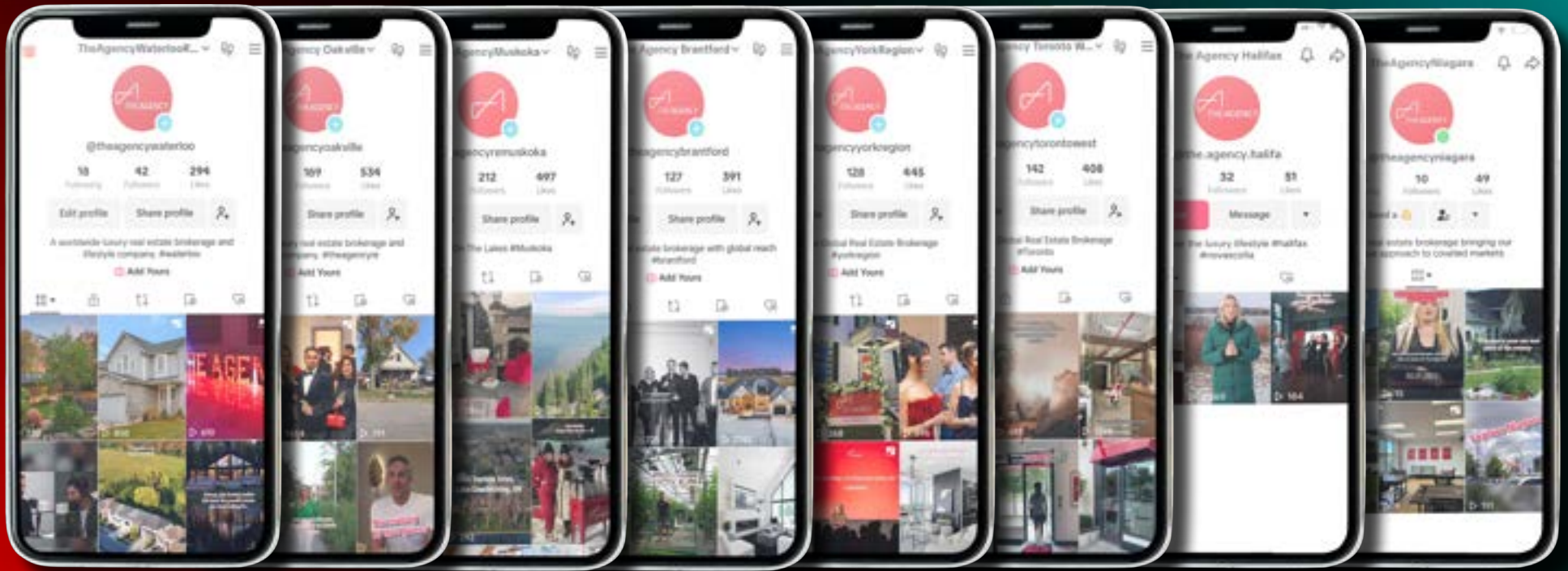
Listings | Testimonials | Client Success Stories | Agency Sponsored Events | Interviews

Content Must Follow The Agency Brand Guidelines & Must Be Submitted in High-Resolution



+ TIKTOK

## OUR LOCAL ACCOUNTS | FOLLOW, LIKE, COMMENT & SHARE!



LOOKING FOR YOUR LISTING OR CONTENT TO BE FEATURED? EMAIL SAVANNAH AT [MARKETING.ONNS@THEAGENCYRE.COM](mailto:MARKETING.ONNS@THEAGENCYRE.COM)

### *What Videos Can Be Featured?*

Listings | Client Success Stories | Agency Sponsored Events | Interviews

Content Must Follow The Agency Brand Guidelines & Must Be Submitted in High-Resolution

## STAYING RELEVANT WITH OUR SOCIAL MEDIA LIBRARY

We provide monthly assets for most national holidays and Agency events such as build days and Forum along with other special announcement such as The Agency Magazine release. We also have many Agency branded posts that incorporate our Rules and culture.

Head to our Dropbox and browse each folder, such as Important Dates/Holidays, Market Stats, Office Announcements, Spotify, Rules and Sayings, Videos, Magazine, Buying Beverly Hills and more!



ACCESS SOCIAL ASSETS



## SOCIAL MEDIA FAQ

**Can I share other Agency listings from across the globe?**  
Yes!! Just remember to tag the listing agent and use their original images and caption.

**I need a custom social post made, who can I contact?**  
Email [marketing.onns@theagencyre.com](mailto:marketing.onns@theagencyre.com) with your request or browse the available templates in the Creative Center.

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# LISTING & MARKETING TURNAROUND TIMES

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## + MARKETING

### Template Designs

Generally require **1-2 business days** to complete, depending on the task and current volume of requests.

### Custom Designs

Generally require **5-10 business days** to complete, depending on the task and current volume of requests.

**Note:** It is important to include all copy, specs, and images in order to launch the project.

### Print Ads

Turnaround times vary based on the content and publication, but if this is a one-time ad for a listing or branding piece, we recommend **5-10 business days** of design time after the media is booked.

For a tighter turnaround, check out the templates on Creative Center to get the draft quicker.

**Note:** Ensure you have the print-ready file **BEFORE** either sending it to the printer or leaving your house to take it to the printer.

### Rush Timelines

Need something sooner? We can always make something happen. Just reach out and we will walk through the best solutions for your immediate needs.

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### *Need a design?*

[marketing.onns@theagencyre.com](mailto:marketing.onns@theagencyre.com)



## + LISTINGS

Listing paperwork, pictures, tours, and floor plans should all be emailed to your AEM **24 hours** before a listing goes live.

Incomplete data forms will be returned to the listing agent and need to be completed before the listing can be activated.

A draft will be emailed to the listing agent for final approval before it is activated. Ensure to review, email any changes needed and confirm you would like the AEM to activate.

If a listing is being inter-boarded, some boards require 48 hours' notice. Make sure you have provided the correct Data form and made payment before the listing day.

Relists still require 24 hours' notice with the new listing agreement and data forms and a fully signed cancellation, signed by Katia Bailey.

### Forms Required:

- Listing Agreement
- Entry Access
- Open House and Lockbox form
- Surveillance and Audio form
- Data Forms (one for each board you would like to list on)
- Sellers Direction
- Disclosure (if required)
- Fintrac
- WWR
- Showing Instructions page



QUESTIONS?

YOU KNOW HOW TO REACH US.

YOUR AEM IS YOUR FIRST LINE OF DEFENSE