



SIDER ROAD

Practice: Real Estate

Building Business Environments for Team Success
One Team At a Time

Fiscal Management /Operations Training for Real Estate Teams



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Trusted, Honest, Experienced, Confident

effective business begins with effective teams.
we build effective teams.



Climate changes are coming.

We don't mean the weather...it's the real estate business

2021 and Beyond ...here's how the workplace will grow:

Expect to see a rise in more diverse, well-rounded teams over the next 3-5 years*

55%

more
workplace
flexibility

52%

rise in multi-
generational
and nationalities in
the workplace

42%

increase of
women in
leadership roles

46%

rise in virtual/
mobile teams

*Kelly Services, Inc. Data cleaned and structured by Intelligence Group.

**teams of independent brokers and agents
need guidance and expert training
to run their business effectively and efficiently**

OR

the teams and parent organization suffers

do these sound familiar? these ARE team problems!

Turnover is high

Under trained business leaders / brokers

Tension is **apparent**

Agents and support staff are **unhappy**

Limited time for multiple tasks or training

We are doing things **like we always have**

Limited communication

Lack of **focus** and **conflicting goals**

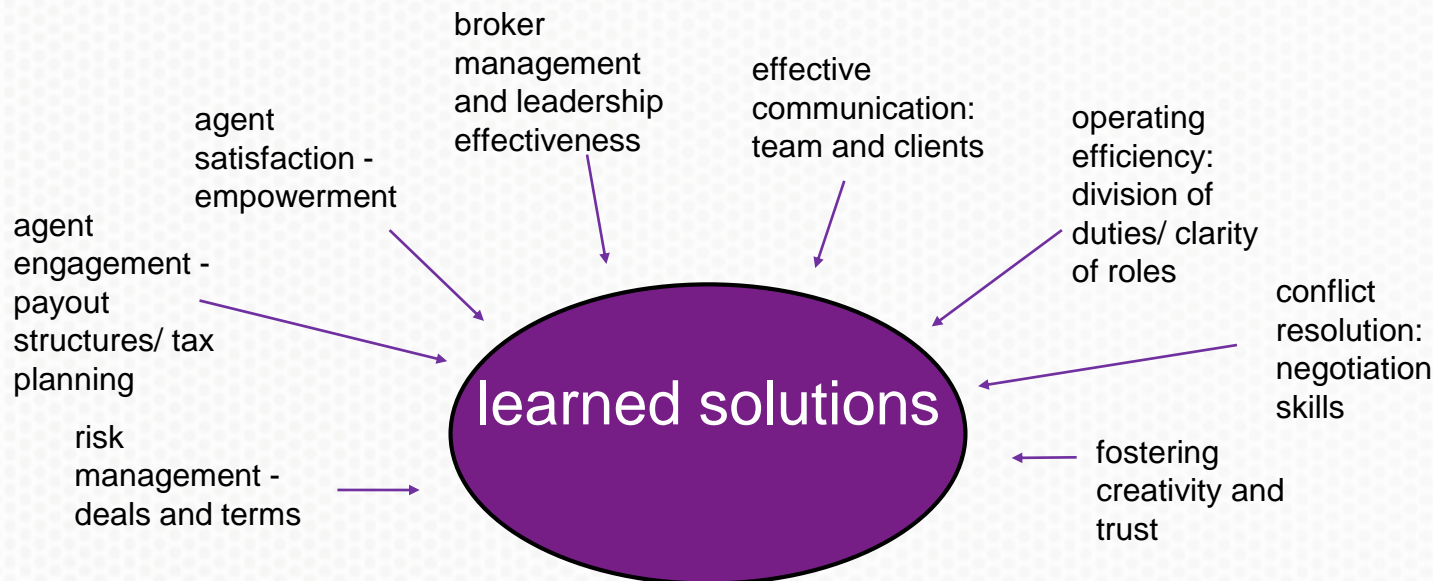


we resolve team challenges no matter what mask they wear.

Why bother to fix the climate?



Trust is created. People are engaged; Low Turnover. Reduction in healthcare costs. Revenue Results: ***22% Increase**



Sider Road Insight

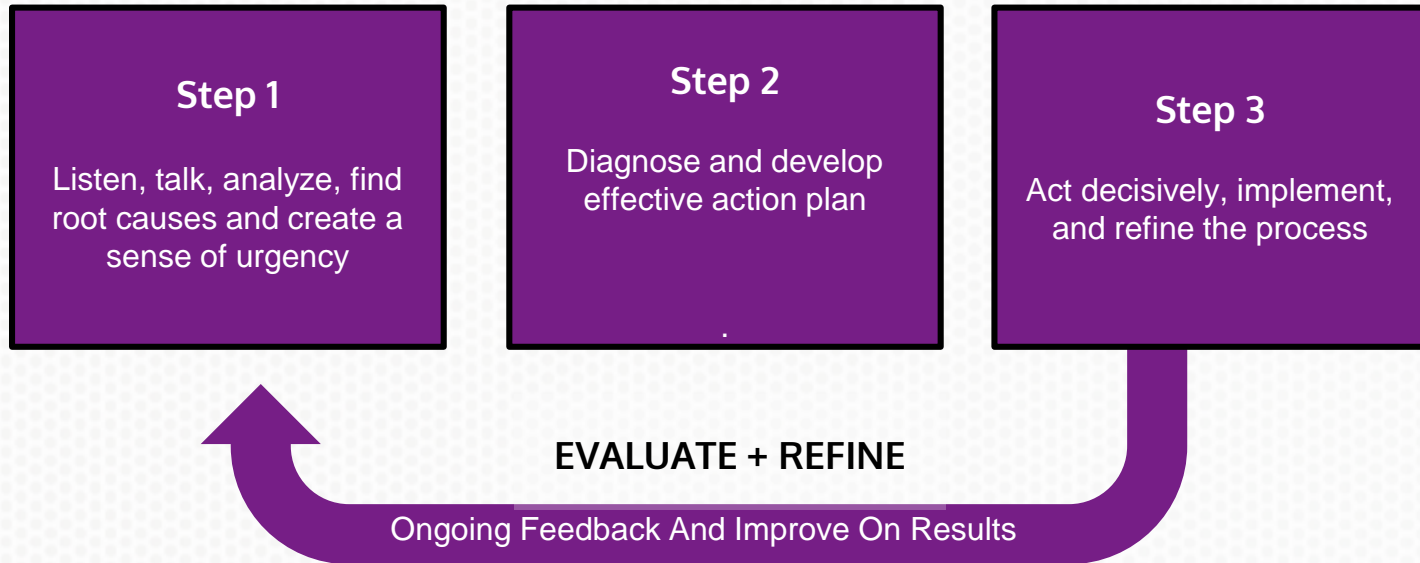
**\$300B productivity lost in US alone
due to Business Climate stress.***

*<http://www.businessinsider.com/how-stress-at-work-is-costing-employers-300-billion-a-year-2016-6>

don't be a contributor to the problem.

how we do it.

Based on proven methodology, we develop an actionable plan, quickly.



experience the difference the ACTion plan (Applied Critical Thinking).

Research-Backed Curriculum

- Get the most up-to-date curriculum from our experts, distilled from the research into personalized blended learning experiences

Multiple Delivery Modalities

- High impact, live classes delivered on site, on-line or in a blended format, tailored to the needs of the organization

World Class Educators

- Professionals, who are also Educators, facilitate a customized learning experience to ensure you get the outcomes you expect

Robust Reporting

- Attendance, feedback and measured learning outcomes are delivered with the program. Incremental performance will be seen over time

Customized Content

- Our team works with you to develop a customized training and education program to maximize the impact to your organization

Hands on Success

- Your training program is managed from design to delivery by our executive trainers to ensure the best results

Offerings.

We Listen To You. We Listen To Your Team. **We Draw Your Blueprint For Change.**

| | Training | Assessment | Consulting | Team Development |
|-------------------|---|---|---|---|
| Objective | Create awareness and knowledge within your team about your business | Get an understanding of current challenges in your office climate | Increase revenue by improving your office climate | Reduce conflict + increase productivity |
| Activities Topics | Operations, Business Acumen, Metrics, Culture + Climate, Efficiency and Effectiveness | Interviews Analysis Communication | Assessment Training Team Development Planning Change Management | Team Dynamics, Managing Diverse Teams, Building Team Creativity |
| Deliverables | Workshop / Training Report-out Check-ins | Feedback Workshop Report Check-ins | Project Plan Implementation Check-ins | Interviews Workshop / Training Coaching Follow Up Action |

Business niche experience.

Sider Road delivers both functional and industry expertise to our clients

Functional Segment

- Data & Analysis
- Data Management
- Descriptive Analytics
- Predictive Intelligence
- Content Development & Syndication
- Digital Marketing
- Editorial Planning
- Finance
- Human Resources
- Marketing & Advertising
- Media Buying
- Operations
- Technology Operations
- Media Buying

Market Segment

- **Real Estate**
- Consumer Packaged Goods
- Higher Education
- Entertainment: Music, Theater,
- Financial Services
- Food & Beverage
- Healthcare
- Industrial
- Media
- Politics
- Wine & Spirits
- Publishing, Broadcasting, Digital
- Lifestyle
- Weddings
- Sports

folks who trust us.

Goldman Sachs

ENGEL & VÖLKERS

Saatchi & Saatchi

COLIN COWIE LIFESTYLE

COLUMBIA UNIVERSITY

STETSON

NYU



BNY MELLON

SYRACUSE S

HBO

wework

WSJ

MERCY COLLEGE

MP

MILLENNIUM PARTNERS

VIACOM

EXTRADE



Julius Bär

PiFi
Presentation Multimedia

RCG GLOBAL SERVICES

DAG NYC

Magento

BEST

Molloy College

kraft foods

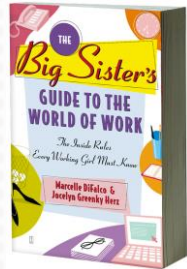
SIDER ROAD OFFICE CULTURE

about the founder.



Jocelyn Greenky

Founder. Thought Leader on Team Development, Trust, Leadership, Operations, D&I and Operations expert.



Author of *The Big Sister's Guide to the World of Work: What Every Working Girl Must Know* (Simon & Schuster).

Jocelyn Greenky is an author, professor and an accomplished business climate expert. She works globally building environments for success. She has worked with global C-Suite leaders at Fortune 500 companies, mid-sized and startups. She recognizes the day-to-day issues which must be solved are often buried or overlooked. Her results create positive trusting environments by honing leadership skills and addressing back and front office operations, cultural, generation and gender diversity, as well as office politics and etiquette.

Background:

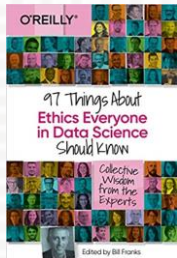
Holds an M.B.A. in Organizational Leadership from Mercy College with Distinction, Yale University certified negotiator, Cornell University Diversity & Inclusion certified, and a B.S. from Syracuse University. She is an Adjunct Professor at Mercy College and mentor with Everwise, Women of Tomorrow, AOL, YearUp and Columbia University. She has been a Managing Director with Stetson Real Estate and currently Compass holds her license. She has been featured in *NYTimes*, *USA Today*, Fox, CNBC, CNN, *Fast Company*, *Washington Post*, *NY Post* among others media outlets. Prior she has held executive positions at Philip Morris, Wenner Media, Hachette Filipacchi and was a co-founder of Colin Cowie and CEO / Founder of BriteBean software.

about john power.



John Power

Partner. Thought Leader and Educator on Financial Operations, Financial Systems, Data Management, Operations Management and Business Strategy.



Contributing Author to *97 Things About Ethics that Everyone in Data Science Should Know* (O'Reilly).

John is a proven senior executive who was most recently Chief Financial Officer and Chief Administrative Officer of DS Healthcare Group, Inc, a Nasdaq listed company.

Previously, John was the CEO and Founder of Mark My Media, an education technology company providing pathways to the finance industry for students in universities across the US. Other roles include, COO and CFO of Mantara, a venture-backed technology firm focused on high frequency/low-latency trading platforms. John was Chief Administrative Officer at Mellon Investor Services and President of Mellon Securities through their acquisition by Bank of New York and was part of the integration team.

Prior to Mellon, John was the Director of Finance for E*Trade Financial. During his tenure, John was involved in sixteen acquisitions by E*Trade including Harris direct purchased from BMO Financial Group and BrownCo purchased from JPMorgan Chase & Co. Prior to E*Trade, John was Controller/Chief of Staff for Bank Julius Baer's US Private banking unit. John started his management career in finance at Spear, Leeds & Kellogg. John has a B.S. in Finance from Manhattan College, an M.B.A. from Dowling College and is currently pursuing his Doctoral degree in business at Wilmington University.

John is currently on the faculty of the MBA program at Mercy College School of Business and has taught over 2,000 graduate students.

He is married with two sons and loves scouting, camping, reading and travelling extensively.

examples of previously delivered courses.

Accounting: For Non-Accountants

For Non-Accountants:

Learn how revenues and costs flow through the books of any organization. Managers should have a robust understanding of the implications of their decisions.

Results: Financial reporting has more meaning and impact in the organization

Budgeting Process: Understanding a budget and how to put it together, will enable better management across the organization.

Results: Increased buy-in and understanding of financial goals

Cost Management: Strategies for a more effective and efficient cost structure.

Results: Increased awareness and efficiency across the organization

Cost allocations:

Understanding how costs get distributed, understanding your fully loaded cost of operations to more effectively manage them.

Results: Reduced friction between areas increases cooperation

Customer profitability:

Which customers are actually profitable and by what margin.

Results: True understanding of you best customers, better customer engagement

Product Profitability:

Which products are actually profitable and by what margin

Results: True understanding of your product offerings, better pricing strategy

Model design (Excel):

An excel training and how to build and structure a models use in business.

Results: More analytical employee decision making

finance for people who don't love financials.

Cash Management:

Managing your cash, budgeting, forecasting, models and how to manage the cash effectively.

Results: Cash flow impact is understood and managed

Balance Sheet Management:

Asset and liability management includes: timing of receipts and payments, modeling for efficiency, options for flexibility.

Results: Better understanding of how value is created and captured

Due Diligence Methods:

How to look at an acquisition in light of what it brings to your financial results.

Results: Better decision-making

Synergy Modeling and Capture:

In an acquisition or merger.. how to capture the most cost savings in the combined organization

Results: Better performance

Finding a strategic investor/partner:

Investors and partners are not made the same. Which one is right for you?

Results: Effective partnering...from the start

Compensation:

Structures - Incentives, splits and benchmarking, Performance indicators and tracking.

Results: Alignment between goals and compensation

Real Estate Operations:

How a broker operation works - maximizing your profits, structuring a deal.

Results: Understanding how the business works...end-to-end

Banking Operations

The mortgage process, credit, bank operating model

Results: Getting the best for your client

Capital Raising alternatives and impact:

Equity capital, convertible debt –understanding the multiple ways to raise capital for the projects in which you are involved.

Results: Better decision-making

Optimizing Financial policies, procedures and practices:

Risk management in financial reporting

Results: Understanding the concept of risk and how to manage it

marketing.

Developing Co-opetition partners

Finding and developing your most unlikely sources of cooperation with your competitors

Results: Think differently to win more business

The competitive Landscape: figuring out how to win:

Mapping the competitive landscape and finding areas on which to capitalize

Results: Better understanding of full competitive landscape

Channels and Supply Chain management:

Understanding and selecting the right ways to bring your properties to market

Results: Define the right sales strategy for each property

Segmentation for customer engagement:

Slicing and dicing your customers based upon their profiles. Develop customer profiles to engage them at a deeper level.

Results: Better customer relationships

Developing a niche:

Carving out a distinct market segment. Playing to your strengths and becoming THE expert for a market niche.

Results: Learn to define and own a piece of the market

Product Strategy:

Defining your products, their benefits and your true points of differentiation.

Results: Learn to stand out from the crowd, in a positive way.

management.

Organizational Design:

Structuring the organization for better alignment

Results: Optimize the team

Reorganization Management:

how do you do this without destroying the current value

Results: Results without problems

Managing in a Matrix Environment:

Ensuring that your centers of excellence are what they were meant to be

Results: Eliminate cross communication

Integrating Strategy and Vision into your Department:

Aligning subunits with the overall. Corporate strategy

Results: Everyone pulling in same direction

Data Analysis:

Understanding your information and utilizing it for better decision making.

Results: Make data driven decisions

Attracting Talent:

Strategies for engagement across various demographics effective to your organization

Results: Get the right people wanting to work with you

Leveraging Technology for Efficiency:

Understanding what proceeds can be made more effective and profitable through technology

Results: Use more than the calendar and email on the computer

Subsidiary / Join Venture Development:

Times when you are better off partnering with someone or creating a subsidiary to create an arms length type of relationship. When and how is that executed?

Results: Optimize the value through multiple channels

Managing a Turnaround:

Restructuring your group / team

Results: Do it once, do it right

M&A

Integrating an acquired business

Results: Capture the intended value

sider road trusted experience.

Beyond the operations

Human Capital

Diversity & Inclusion

Cross-Culture Management

Multi Generational

Social Responsibility

Corporate Business Climate and Culture

Leadership and Training

Compensation & Benefits

Organizational Design

Performance & Motivation

what's with the sider road name?

Jocelyn had a second mother, Emma Sider. She was a Mennonite. She spent her weekends and summers on a 250-acre working farm with Emma and her siblings all of whom resided on what was known as Sider Road in Canada.

First hand, Jocelyn learned how to farm, respect the land, respect one another and trust the cycle of seasons which sometimes are fair and other times not, just like life. Reaping wheat along with caring for healthy cows, ducks, pigs and other livestock takes patience, emotional intelligence and just plain hard work.

These values provide the basis for our company, Sider Road.

pricing options.

Silver: \$1,500

→ Full review of any one of the four areas: Financial, Marketing & Customer engagement, Operations or Team structure and dynamics (up to 8 hours of assessment to understand)

→ Assessment Report customized for your team

→ Implementation support available at \$250/h or up to 15 hours per month for \$2,500

Gold: \$2,500

→ Full review of any two of the four areas: Financial, Marketing & Customer engagement, Operations or Team structure and dynamics (up to 16 hours of assessment to understand)

→ Assessment Report customized for your team

→ Customized plan development for improvement

→ Implementation support available at \$250/hr or up to 15 hours per month for \$2,500

Platinum: \$5,000

→ Full review of all four areas: Financial, Marketing/Customer engagement, Operations or Team structure and dynamics (up to 40 hours of assessment to understand)

→ Assessment Report customized for your team

→ Customized improvement plan development and project plan design

→ Implementation support available at \$250/hr or up to 15 hours per month for \$2,500

Q & A

what questions do you have for us?

hello@siderroad.com www.siderroad.com