

Estate agents and lettings agents

General competency framework · Professional level · 5 competencies · approx. 75 minutes

How to use this guide

- Focus on these 5 competencies — the behaviours that matter most for this role — not a chronological career history.
- Ask every candidate the same core questions, then probe. Allow around 15 minutes per competency.
- Ask for real examples and use STAR — the Situation, the Task, the Action they took, and the Result.
- Stay neutral, capture what they say, and judge later. Gather evidence on one competency at a time.
- Rate each competency 1–5 against the positive and negative indicators, and note the evidence.

5 Outstanding 4 Good 3 Acceptable 2 Marginal 1 Poor

1. Influencing and Persuading

Presents simple, impactful messages in a compelling manner. Changes their emphasis and approach to address resistance, focusing on the value their ideas will bring different stakeholders. Confidently negotiates effective outcomes.

Why this matters for Estate agents and lettings agents: The role is fundamentally a sales and influencing function under NAEA Propertymark / ARLA Propertymark Codes — instruction-winning, viewings, offer negotiation, completion chasing. Presenting compellingly, adapting to resistance, negotiating outcomes is the core craft.

Describe a situation where you had to explain something to somebody who did not share your level of understanding on the subject.

- How did you make the message meaningful/accessible?
- What were the main challenges with this communication?
- How did you deal with these? What approach did you take?
- How did you gauge the effectiveness of your communication?

There are times where no one is prepared to listen or it is hard to keep the attention of others. Give me an example of a time when this has happened to you.

- What were the main objections/issues/barriers to others listening?
- How did you overcome these?
- What insight did you get into your audience? How did you get this?
- How did you use this insight to inform your style of communication?
- How did you present your message? What worked well? Less well?
- What was the outcome of the communication?

Describe a situation where you persuaded someone to do something (e.g. accept your point of view/get on board with an idea/commit to buying a product or service).

- How did your opinion contrast with their initial position?
- What was the main point of contention? How did you win them round?
- What was the outcome? What agreement was reached?
- What were the key things you did that made you successful?

– Has there been an occasion when you have been unable to persuade?

NEGATIVE INDICATORS	1 · 2 · 3 · 4 · 5	POSITIVE INDICATORS
Fails to convey information in a simple and accessible manner. Uses unnecessary jargon or fails to appreciate the baseline level of understanding of the audience		Aware of the need to keep messages simple and impactful – avoids using jargon and tailors message to the base level understanding of the audience
Presents information without consideration of the needs/ style/preferences of the audience. As such message may lack impact/be less compelling		Considers the style and needs of the audience when communicating. Adjusts style/tone/content to ensure the message is compelling and resonates
Highly logical/rational/factual in approach – no passion or enthusiasm displayed in tone/pace/body language/words when communicating with others		Displays passion and enthusiasm when interacting with others
Fails to emphasise the value that their ideas will bring to each individual stakeholder. Does not sell on an individual/emotive level		Considers the benefits to individual stakeholders and sells on the basis of these. Presents the information of value to them rather than losing this in all of the facts/detail
Loses credibility by presenting imbalanced arguments (e.g. focusing on the pros and disregarding the cons)		Presents a balanced view of pros and cons rather than an overly rosy picture
Fails to pick up on cues from audience (e.g. resistance/ apathy/opposition) or picks up on these but chooses to ignore them and presses on with message regardless		Tuned into the audience and able to pick up cues of disinterest/apathy/opposition/resistance. Confidently surfaces and deals with these
Becomes overly apologetic or deferential when faced with objections/resistance. Lacks conviction.		Handles objections convincingly – displays confidence and conviction when faced with opposition
No evidence on changing emphasis/approach/tone based on insights gained/responses from the audience. Is firmly on transmit rather than receive when communicating		Prepared to change emphasis/tone of communication in the moment in response to insights gained about the audience
No evidence of proactively seeking feedback on effectiveness of communication		Seeks feedback to gauge the effectiveness of communication and applies learning to new situations
No evidence of checking understanding of audience to ensure that messages are landing effectively		Seeks to clarify understanding to ensure that communication has landed effectively
Is less confident in situations requiring negotiation		Confidently negotiates successful outcomes
Enters negotiations without clarity on where concessions can be made and with limited understanding on items of high perceived value to the other party.		Prepares well for negotiation. Understands where concessions can be made and appreciates and uses items of high perceived value.

Summary of evidence: _____ Rating (1–5): _____

2. Customer Focus

Builds effective customer relationships to ensure needs and expectations are understood. Understands the importance of the customer to the business, seeking regular feedback whilst being prepared to say no when needed.

Why this matters for Estate agents and lettings agents: The role serves two principals at once (vendor/buyer, landlord/tenant) under conduct rules requiring fairness and integrity to all parties (Propertymark Codes, The Property Ombudsman Code). Vendors, buyers, landlords, tenants — understanding needs (often competing) and advising honestly defines the trusted agent.

Give me an example of a time when you provided excellent customer service/went the extra mile for a customer.

- What did you do differently in this situation? Why did you do this?
- What makes this situation stand out for you?
- How does your approach compare to that of your peers?
- What was the outcome? How did you know the customer was satisfied?

At times we all fail to deliver what a customer requires. Can you think of a time when this has happened to you?

- Why were you unable to meet the needs of the customer?
- How did you feel about this? What feedback did you receive?
- How did you respond to the customer's subsequent requests?
- What have you done to prevent the same situation occurring?
- What feedback mechanisms have you put in place to ensure customer satisfaction?

Sometimes customers don't really understand what they want or present requests that will not meet their real need. Tell me about a time when you had to ask questions/listen carefully to clarify the exact nature of the customer's need.

- How did you get to the root of the issue/help the customer articulate their real need?
- How did the customer respond?
- What would have been the impact of you not acting in this way?

NEGATIVE INDICATORS	1 · 2 · 3 · 4 · 5	POSITIVE INDICATORS
Is less focused on providing excellent service to customers. Sees customers as a means to an end rather than an end in itself		Provides a friendly, efficient, professional and courteous service to customers
Lacks accountability/responsibility for customer issues. Fails to show personal commitment for resolving customer issues		Takes personal responsibility for customers, prioritising customer satisfaction highly
Fails to see/articulate the link between the customer and the organisation/business. Fails to appreciate the commercial impact of positive/negative PR		Understands the importance of the customer to the organisation/business. Clearly articulates the link between customer satisfaction and business performance
Presents customers with solutions that are based on wants rather than real needs. Is not always honest in dealings with customers		Is honest and authentic in dealings with customers – provides clear recommendations based on insights from the customer
Does not seek to truly understand and ascertain customer needs. Operates more on a "here is my solution, what is your need" basis or focuses more on customer wants rather than needs		Demonstrates a genuine curiosity and interest in the customer. Asks the right questions and listens carefully to the customer to build trust in the relationship and get to the real need
Fails to demonstrate empathy or an appreciation of the impact of their message on the customer. Could do more to put themselves in the shoes of the customer		Demonstrates empathy with customers. Show sensitivity and considers the impact of their message on the customer

Focuses on completing a transaction rather than developing a relationship with the customer		Focuses on developing a customer relationship rather than on completing a transaction
Is not proactive in seeking regular feedback from customers		Seeks regular feedback from customers
May over promise and under-deliver when customers are unrealistic with demands or when requests are not commercially viable. Needs to be able to say no (with integrity) to customers		Will not promise what cannot be delivered and ensures that work with customers is commercially viable. Prepared to say no to customers

Summary of evidence: _____ Rating (1-5): _____

3. Drive for Results

Strives for outstanding results, setting themselves high standards and being driven by targets. Pursues the goal with energy, actively seeking opportunities to improve.

Why this matters for Estate agents and lettings agents: The commission-based, target-driven nature of the role demands sustained energy and active pursuit of opportunity. Drive for Results captures this without it being captured elsewhere — winning instructions, progressing pipeline, closing deals all run on personal target focus.

Give a recent example of where you did more than what was asked of you or a time when you felt you exceeded your objectives/performance standards

- What did you do? Why did you do it?
- What was the consequence to you (what did you sacrifice/gain?)
- By how much did you exceed your targets? How did you feel?
- What opportunities did this give you for personal development?
- How did you capitalise on these? What did you learn?

Tell me about a time when you set yourself a stretching/ ambitious target.

- What made it ambitious?
- How did it compare with other targets you had set yourself?
- Why did you set the bar so high?
- What impact did it have on your behaviour?
- How well did you do?
- How do you continue to motivate yourself to higher levels of performance?

Describe a situation where you needed to be persistent in achieving your goals/had to work to overcome significant barriers or obstacles

- What were the circumstances/barriers/obstacles?
- How did you overcome these?
- What reserves did it draw on for you to do this?
- What made you keep going?
- What was the outcome? What feedback did you get?
- What did you learn from the experience?

NEGATIVE INDICATORS	1 · 2 · 3 · 4 · 5	POSITIVE INDICATORS
Targets and objectives do not have a great impact on motivation and discretionary effort used		Driven by the achievement of targets and objectives

Tends to put in less effort rather than really pulling out the stops and making (personal) sacrifices to make things happen		Is prepared to make sacrifices in order to achieve targets. Consistently achieves goals. Pulls out all of the stops to make things happen.
Can quickly tire or become disillusioned with goals		Pursues goals with energy and enthusiasm – accepts challenges and set-backs and bounces back with steely determination
Gives up easily or fails to proactively find ways to deal with issues/barriers to goals achievement		Proactively overcomes barriers to success/achieving goals
Is not able to clearly articulate standards and success measures for role		Sets high standards for self and raises the bar on performance every day in order to develop and improve
Fails to sustain energy/struggles to keep self focused and motivated to deliver results		Demonstrates the ability/tenacity to sustain personal energy and motivation over a period of time to deliver results
Prefers to operate within comfort zone. May not rise to the challenge and offer self up for stretching assignments		Actively seeks stretching and challenging assignments and has a hunger to take on more/have more responsibility
Is tolerant from mediocre performance		Strives to excel in their role. Has the desire to be the best that they can be

Summary of evidence: _____ Rating (1-5): _____

4. Resilience

Remains calm and maintains a positive attitude when faced with difficult circumstances. Thrives under pressure, remaining focused despite distractions. Quickly recovers from setbacks.

Why this matters for Estate agents and lettings agents: Rejection is a daily feature (failed offers, gazumping, fall-throughs), evening and weekend hours are routine, and deal volatility is high. Bouncing back and maintaining pace matters.

Describe a situation where you felt that the demands being placed on you were unreasonable/excessive

- What did you do to help manage the pressure of the demands?
- How successful were you? How do you know (feedback)?
- What was the impact on your performance?
- How did you minimise any negative impact on your performance?
- With hindsight what have you done differently when faced with demanding/pressurised situations?

Tell me about a crisis (at work) you have handled recently.

- What caused it?
- What did you need to do to resolve it?
- How were you feeling at the time?
- How did you manage your emotions? How effective were you?

Give me an example of a significant setback that you have experienced in your role/career to date.

- How did this come about?
- What did you do? Why?
- To what extent were others aware of your feelings?
- How do you feel about the situation now?
- What would have helped you to pick yourself up more quickly?

NEGATIVE INDICATORS	1 · 2 · 3 · 4 · 5	POSITIVE INDICATORS
Becomes ruffled or emotional when under pressure – loses control when under stress		Remains calm and collected in difficult circumstances. Keeps control in stressful situations
Takes eye off the ball and can become distracted/ preoccupied when under pressure to the detriment of performance		Maintains performance under pressure. Indeed thrives in pressurised situations
Uses a limited range of coping strategies or maladaptive coping strategies when under pressure (e.g. poor diet and little exercise)		Adopts a range of effective coping strategies to deal with pressure (e.g. manages symptoms, re-frames, tackles the source)
Fails to consider or spot signs of pressure in self		Recognises signs of stress/pressure in self
Gives up easily – does not show tenacity when faced with setbacks		Persists with a course of action despite setbacks – shows tenacity in the pursuit of goals
Tends to dwell on disappointments or setbacks which can interfere with focus and performance		Remains a positive outlook in the face of setbacks and disappointments – sees them as an inevitable part of the process. Learns and moves on
Loses focus when under pressure		Maintains focus when under pressure
Focuses on the wrong things – gets caught up in distractions and loses focus/attention		Manages distractions in the working environment and keeps self focused on performance goals

Summary of evidence: _____ Rating (1–5): _____

5. Dependability

Conscientious and thorough in their approach to work, delivering what they promise to the necessary standard. Behaves in line with the organisation's values and ethical principles.

Why this matters for Estate agents and lettings agents: Propertymark Codes, The Property Ombudsman Code (statutory force via Estate Agents Act 1979 / Consumer Rights Act 2015), and RICS Rules where chartered all require integrity, money handling, and transparency. Reputation drives referral. Following through on promises, handling money and documents correctly.

At times we all fail to deliver what's required or struggle to keep our motivation to see things through to completion. Describe a time when this has happened to you?

- Why were you unable to deliver/what caused you to lose motivation?
- How did you feel?
- What did you do to try to overcome the problem?
- What feedback did you receive? What did you learn?
- What have you done to prevent the same situation occurring?

Give an example of a time when you've had to compromise on quality in order to get a task completed on time?

- How did you feel about the compromise on quality?
- What were the issues that you anticipated as a result of this?
- What did you do to address these issues? Who did you consult/inform?
- Can you describe a time when you have not been prepared to compromise on quality/standards and have pulled out all of the stops to deliver to expectation?

Day-to-day, how do you monitor the quality/standard of your work?

- What measures are in place to allow you to do this?

- How useful is the information from the measures?
- How have you used the feedback to assist you in providing and maintaining high quality/standards in your work?

NEGATIVE INDICATORS	1 · 2 · 3 · 4 · 5	POSITIVE INDICATORS
Lacks personal accountability – prepared to let things slip or leave issues unresolved where this would require additional/discretionary effort		Takes personal accountability for performance and shows tenacity and commitment in the pursuit of goals. Works hard to self-motivate and maintain motivation
Quickly loses focus/enthusiasm or energy for a project/ activity when the going gets tough		Shows determination to see things through to completion. Remains focused on the task in hand when the going gets tough
Is prepared to cut corners to meet deadlines (or lets deadlines slip in the pursuit of perfection) – no evidence of weighing up the needs by context/ circumstances		Appreciates the balance between delivering to time and delivering to quality standards and consciously works to get the balance between these right
May not deliver on commitments – may over promise or under deliver. Trivialises the importance of delivery and honouring commitments to others		Delivers what they commit to – can be relied upon to deliver on promises
Is focused on quantity rather than quality of output. Completes tasks to tick the box rather than to ensure that quality standards are adhered to		Is focused on standards and quality of output
No evidence of measuring/assessing the quality of outputs either via formal or informal measures		Keeps a check on the quality and standards of work via formal and informal checks and measures
Is prepared to stand by rather than challenge behaviour that is not in line with organisational values. In doing so pays lip service to the values		Is prepared to put self out and challenge behaviour that is not aligned to the values of the business. Takes the values seriously and can make the link between the values and the success of the business
Cannot articulate the organisations values or give examples of how they have role modelled the values through their own behaviour		Seeks to role model the organisations values in all that they do – can provide clear examples of how the values have driven decisions/behaviour

Summary of evidence: _____ Rating (1–5): _____