

SAMPLE: TEAM

SINGLE-PAGE BUSINESS PLAN

ANNUAL GOAL

\$50 Million Annual Sales Volume

3 KEY FOCUS AREAS

- ① **Customer Service:** Create the Ultimate Client Experience
- ② **Lead Generation:** Track Agent Generation & Conversion Activity
- ③ **Hire & Recruit:** Attract New Talent to the Team

5 OBJECTIVES FOR EACH FOCUS AREA

1

CUSTOMER SERVICE

1. Admin Assistant to conduct 30, 90, and 120 day follow-up calls to clients after all closings to suggest vendors for improvements & ask for referrals.
2. Produce pre-listing video introducing the team, marketing plan, and services we provide to send to client prior to initial listing appointment.
3. Increase online presence with 4 team websites:
 - Sellers
 - Buyers
 - Neighborhood Farms
 - Blog
4. Enhance/update client database contacts:
 - 33 touches per year
 - Client appreciation event
5. Grow vendor database
 - Contact regularly
 - Vendor appreciation party
 - Create vendor list & web page
 - Refer them systematically

2

LEAD GENERATION

1. Conduct group lead generation every Mon-Fri for 2 hours (9a-11a) for all sales agents. Agents meet at 8:30a for role play and scripts practice beforehand.
2. Sales agents to track lead generation activities (Contact - Appointment - Contract), and submit at end of each week for accountability and to establish conversion ratios.
3. Determine criteria & system to:
 - Distribute inbound leads/calls
 - Make outbound contacts to COI, FSBO, Expireds, Just Listed/Solds and Farms
4. Develop action plans & campaigns to farm 4 neighborhoods.
5. Each month, obtain:
 - 10 new listings;
 - 9 buyer contracts; and
 - 15 closed transactions

3

HIRE & RECRUIT

1. Begin search for an Administrative Lead Coordinator. Interview 4 applicants per month until found. Create job description and establish behavioral profile.
2. Hire an Inside Sales Agent (ISA) - determine compensation schedule, job duties and description, and behavioral profile. Locate ISA training resources or coach.
3. Establish criteria/goals for Buyers Agents to earn Showing Assistants. Establish respective job descriptions and compensation schedules.
4. Develop printed and video presentations to recruit new sales agents.
5. Locate two new sales agents in adjacent geographic locations to expand and service new areas.