

ACTION STEPS: BUSINESS PLAN

FOCUS AREA: #1 Customer Service: Create the Ultimate Client Experience

5 OBJECTIVES FOR EACH FOCUS AREA

	OBJECTIVE	WHO & BY WHEN
1	<ol style="list-style-type: none">1. Find & create Admin Follow-up phone Scripts2. Add 30, 60 & 90 day calls to closing checklist3. Calendar & conduct weekly role play & scripts practice4. Create Call accountability Tracking Sheet5. Systematize lead follow-up & conversion in CRM for Sales Agents	<p>Brian by Jan 15th</p> <p>Jamie by Jan 30th</p> <p>Mike by Jan 30th</p> <p>Brian/Mike – find online by Jan 30th</p> <p>Jamie/Anita by Feb 30th</p>
2	<ol style="list-style-type: none">1. Find Sample Agent Videos to get ideas2. Create outline of video content3. Contact agent video production companies4. Research options for shooting video(s) ourselves5. Create email template & include in pre-listing checklist	<p>Andrea by June 30th</p> <p>Mike by July 31st</p> <p>Andrea by July 31st</p> <p>Hannah by June 30th</p> <p>Jamie by August 31st</p>
3	<ol style="list-style-type: none">1. Identify website companies to ascertain features & costs2. Create Team Website3. Create Seller & Buyers Websites4. Create Neighborhood Farm Websites5. Create & Maintain Blog	<p>Hannah by March 30th</p> <p>Brian/Mike by May 15th</p> <p>Mike by October 30th</p> <p>Andrea by October 30th</p> <p>Andrea by November 30th</p>
4	<ol style="list-style-type: none">1. Create/update new 33 Touch campaign touches2. Assess costs of updated campaign & adjust budget3. Input updated campaign into CRM4. Create campaign marketing materials5. Systematize lead follow-up & conversion in CRM for Sales Agents	<p>Anita by Jan 15th</p> <p>Jamie by Jan 15th</p> <p>Anita by Jan 30th</p> <p>Hannah & Anita by Feb 15th</p> <p>Mike by March 15th</p>
5	<ol style="list-style-type: none">1. Set goals for weekly vendor database growth2. Find & create vendor database referral scripts3. Systematize vendor calls in CRM & create tracking sheets4. Create Vendor Lists & Website Page5. Plan & Coordinate Vendor Appreciation Event	<p>Brian & Jamie by Jan 15th</p> <p>Brian by Jan 30th</p> <p>Anita by Feb 15th</p> <p>Hannah by March 30th</p> <p>Mike by April 15th</p>