

Business Development

- 1) Develop Private Client Group (Team Leader - Relationship Manager)
- 2) Develop B2B Group (Team Leader - Relationship Manager - Buyers Specialists)
- 3) Develop Micro Market Management (Team Leader - Listing Specialist)
- 4) Exploit Open Houses (Team Leader - Buyers Specialists)
- 5) Niche Marketing (Team Leader - Relationship Manager - Buyers Specialists - Listing Specialist)
- 6) Internet Lead Buys (Buyers Specialists - Relationship Manager)
- 7) Targeted On-Line Marketing (Relationship Manager)
- 8) Targeted Local Advertising (Relationship Manager)

Examples of Niche Marketing: Teachers, Veterans, Health Professionals, Financial Planners, Emergency Responders, Attorneys, etc.

Relationship Management

- Use a relationship based CRM like Contactually or Nimble to start.
- A Leads should be contacted every day. (Team Leader - Listing Specialist or Buyer Specialist)
- B Leads should be contacted 2x a week (Team Leader - Listing Specialist or Buyer Specialist)
- C Leads should be contacted 1x a week. (Team Leader - Relationship Manager)
- D Leads should be contacted 1x a month. (Team Leader - Relationship Manager)
- Private Client Group -Advocates should be contacted monthly. (Team Leader)
- Private Client Group -Mavens should be contacted every 60 days. (Team Leader)
- Private Client Group -Friends should be contacted every 90 days. (Team Leader - Relationship Manager)
- Private Client Group -People out of your service area should be contacted 2x a year. (Team Leader - Relationship Manager)
- B2B Group - Should be contacted monthly. (Team Leader - Relationship Manager)

Client Conversion

- 1) Team Leader to be perfect on Listing Presentation. Appointment to close percentage should be over 80%.
- 2) Team Leader to be perfect on Buyer Consultation. Set expectations up front, referral rate from active buyers should hit a 50% benchmark.
- 3) Buyers Specialists to be perfect on Buyer Consultation. Referral rate from active buyers (looking to buy in next 90 days) should be 50%.
- 4) Listing Specialist should be perfect on Listing Presentation. Appointment to close ratio should be over 70%.

Buyer Servicing

- A Buyers who are looking to buy something in the next 30 days should be contacted every morning. (Team Leader - Buyers Specialist)
- B Buyers who are looking to buy something in the next 90 days should be contacted 2x a week. (Team Leader - Buyers Specialist)
- C Buyers who are looking to buy something in the next 180 days should be contacted 1x a week. (Team Leader - Relationship Manager)
- D Buyers with an undetermined buying time frame should be contacted 1x a month. (Team Leader - Relationship Manager)

Listing Servicing

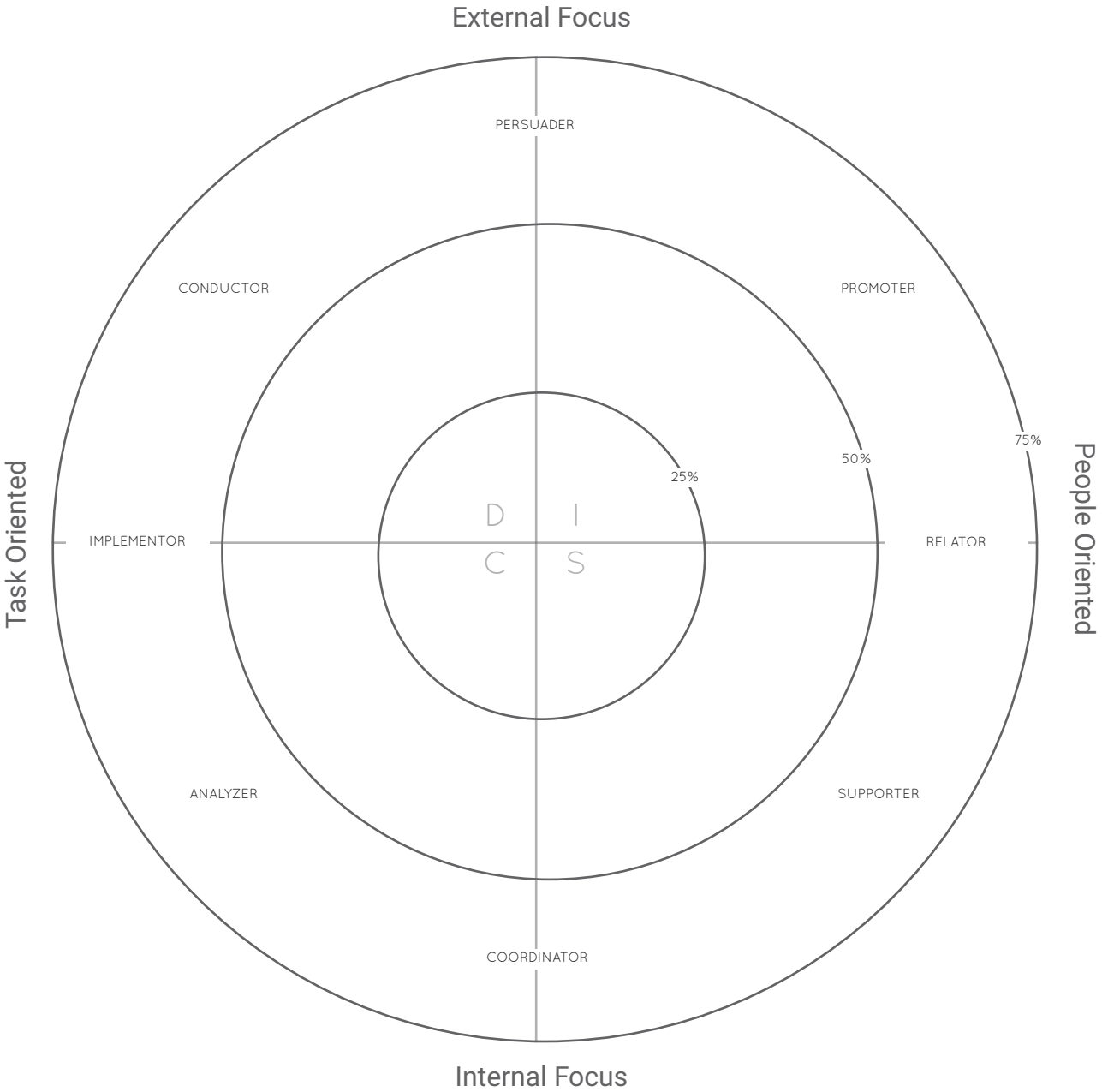
- Active listings should get a showing update on Mondays. (Team Leader - Listing Specialist - Relationship Manager)
- Active listings should get a market update on Wednesdays. (Team Leader - Listing Specialist - Relationship Manager)
- Active listings should get an administrative update on Fridays. (Team Leader - Listing Specialist - Relationship Manager)

Contract Negotiation & Escrow Management

- Clients in contract negotiations should be contacted daily. (Team Leader - Listing Specialist or Buyer Specialist)
- Clients in the first 10 days under contract should be contacted daily. (Team Leader - TC - Listing Specialist or Buyer Specialist)
- Clients in the last 10 days under contract should be contacted daily. (Team Leader - TC - Listing Specialist or Buyer Specialist)
- Outside of the above, clients under contract should be contacted 2x a week. (Team Leader - TC - Listing Specialist or Buyer Specialist)

Personal Development

- Team meetings weekly.
- Conferences 2x a year.
- 4DX Tracking of goals and objectives.
- Read a book a month.



The \$1 to \$5 Million GCI Team

What to look for and what order to bring them on.

- 1) Team Leader (Greater than 75% D, Greater than 75% I)
- 2) Administrative Assistant (Greater than 50% D, Greater than 25% C, Greater than 25% S)
- 3) Buyers Specialist (Greater than 50% D or I, Greater than 25% S)
- 4) Relationship Manager (Greater than 50% I, Greater than 50% S)
- 5) Buyers Specialist (Greater than 50% D or I, Greater than 25% S)
- 6) Buyers Specialist (Greater than 50% D or I, Greater than 25% S)
- 7) Transaction Coordinator (Greater than 50% C, Greater than 50% S)
- 8) Listing Specialist (Greater than 75% I, Greater than 25% S, Greater than 25% D)
- 9) Administrative Manager (Greater than 50% D, Greater than 25% C, Greater than 25% S)
- 10) Relationship Manager (Greater than 50% I, Greater than 50% S)



# Building an Office with Teams

## What Each Team is Responsible for:

Get to 10% market share (350 transactions a year or \$60 million a year in volume)

- 1) Develop Private Client Group
- 2) Develop B2B Group
- 3) Develop Micro Market Management
- 4) Exploit Open Houses
- 5) Niche Marketing within their service area
- 6) Internet Lead Buys
- 7) Targeted On-Line Marketing
- 8) Targeted Local Advertising

## What the Office is Responsible for:

- 1) Brand awareness
- 2) Brand management
- 3) Marketing support and assistance to team leaders
- 4) Compliance and Risk Management
- 5) Web Presence
- 6) Social Media
- 7) Systems
- 8) Referral Network
- 9) Corporate Clients
- 10) Team Leader Positioning and Promotion
- 11) Recruiting
- 12) Listing Emails
- 13) Accounting
- 14) Metric and Tracking
- 15) Shared Services (make team leaders stakeholders)
  - Closing Services
  - Title
  - Mortgage
  - Home Warranty
- 16) Internet Lead Generation
- 17) Education and Training
- 18) Culture and Fun
- 19) Driving loyalty and depth of relationship with team leaders
- 20) Coaching and team leader masterminds

## What layers are available for individual agents on the team:

- Commercial
- Multi Family
- Expireds
- FSBO's
- Renters
- Investors
- NOD's
- Divorces
- Developers

