Spark & Logic

Workshop: Work Smarter, Not Harder

Create a checklist for post-closing client retention.

Description

Agents work together to create a robust checklist of activities and touches to engage clients after the closing. The diverse backgrounds and experiences of the collaborating agents lead to fresh ideas and a comprehensive client retention strategy.

Workshop Deliverables

Each agent will leave the workshop with a usable plan for fostering lifelong clients. Their strategy can be put into immediate application, increasing repeat and referral business.

Preparation

- Provide each agent group with the two attached worksheets (Client Interaction Strategies and Execution Timeline), a pad of paper for additional notes, and writing utensils.
- Set up a chalkboard or dry erase board at the front of the room.
- Have a microphone available if the room is large.

Instructions

1. **Place your agents into groups.** The optimal group size is 5 or 6 agents, which ensures everyone has an opportunity to contribute. The total number of workshop participants will determine how many groups you have.
2. **Go over the instructions for group work.** The goal is for each group to develop a checklist for keeping in contact with clients after the closing. The worksheets you provided will help guide their conversations.
    a. *Client Interaction Strategies & Frequency*: identify what we can do to keep in touch and how often we should do it.
    b. *Execution Timeline*: Determine how and when we will put our retention strategies into practice.
3. **Allow 20-30 minutes for group work.** Each group should assign an official note-taker to present findings.
4. **Present the group findings.** After the small group discussion time, bring everyone together to report on their plans.
5. **List the findings on the chalkboard or dry erase board.**
6. **After the workshop, distribute the findings.** Combine all of the groups' responses into one document and give them to workshop attendees.

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Client Interaction Strategy How will you continue to engage your client (phone call, text message, email, snail mail, pop-by, cards, gifts, etc.)? Be creative and specific.	**Frequency** How often should this approach be used (weekly, monthly, annually, etc.)?

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Execution Strategy: Assign the post-closing client interactions your group identified to the appropriate period.

First Week following closing
30 Days following closing
1 Year following closing
More Than 1 Year following closing