**Sales Meeting Agenda**
November 2022

**Management Version**

*The theme for the fourth quarter is* ***proactive solutions****. During November, we explore* ***financial strategies*** *that support success.*

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| **ROOM SETUP*** Dry erase board or flip chart and markers
	+ Label an area “Parking Lot.”
	+ When an agent brings up a question that needs more thought and response time, add it to the “Parking Lot.” Discuss this item at the end of the meeting if time permits or at the next appropriate meeting.
* Projector/TV/Audio for PowerPoint presentation
* Play upbeat music 15 minutes before the start of the meeting.
* [Stacks of Kindness Game](https://sparkandlogic.com/stacks-of-kindness-4q22/) – setup up the game in your breakroom

**HANDOUTS*** [Agent Agenda](https://sparkandlogic.com/wp-content/uploads/2022/10/agent-agenda-nov2022.docx) (can be distributed electronically to eliminate paper waste)
* [Learning Sprint Handouts](https://sparkandlogic.com/november-sales-meetings-financial-strategies/)
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**AGENDA**

1. Welcome (5 minutes)
	1. Introduction of new agents and staff

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| Chat bubble with solid fill | *Start your meeting off on a positive note.** Ask agents to share their good news. These quick updates can be personal or professional.
* Agent recognition: publicly acknowledge milestones such as a work anniversary, birthday, first listing, first under contract, first closing, production milestone, etc.

Be sure to give equal “shine time” to all agents. |

* 1. Good news
	2. General & community service announcements
1. Company Updates (5 minutes)
	1. New company listings and buyer needs
	2. Company Initiatives (company-specific updates or topics you deem appropriate)
	3. “Parking Lot” items from previous meetings
2. Stacks of Kindness Game (5 minutes)

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| Chat bubble with solid fill | [**Stacks of Kindness Game**](https://sparkandlogic.com/stacks-of-kindness-4q22/) – Using a Jenga game with customized blocks, your agents and support staff play to find the game's "winner" piece. If unsuccessful, they will complete the block's suggested act of kindness. This game is a fun way to engage your entire team, promote your company's values, and build your company culture.* It is unnecessary to formally announce the game at your sales meeting. Your team will be pleasantly surprised when they find it in the breakroom.
* Announce weekly prize winners at your sales meeting. This encourages group participation.
* Ask your agents to share their experiences with their acts of kindness.
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1. Marketing Updates (5 minutes)
	1. Company marketing initiatives
	2. Company community service projects and events
	3. Agent marketing opportunities that complement company/brand marketing
2. Education Opportunities (5 minutes)
	1. November Workshop: [Agent “Hot Seat” Mastermind](https://sparkandlogic.com/november-workshop-agent-hot-seat-mastermind/)

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| Chat bubble with solid fill | * Provide a quick summary of what the workshop will cover to build interest:

*Agents put their heads together to identify a solution to a challenge one of them is currently facing.** Share the workshop date, time, and location.
* Special instructions (i.e., lunch provided or bring a sack lunch)
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* 1. Other real estate classes, events, conferences, etc.

Practical Learning (15-20 minutes)

*Choose one learning sprint per meeting or consider inviting a* [*guest speaker*](https://sparkandlogic.com/wp-content/uploads/2022/07/Guest_Speakers_How_To.pdf)*.*

* [Create a Budget Like a Pro](https://sparkandlogic.com/videos/create-a-budget-like-a-pro/)

An organized and up-to-date budget plan can help agents master the process of projecting income and expenses.

**Handouts:** [Personal Monthly Budget](https://sparkandlogic.com/wp-content/uploads/2022/10/Personal-Monthly-Budget.xlsx) (Excel, email so can be used on a computer), [Production Goals Calculator](https://sparkandlogic.com/wp-content/uploads/2022/09/Production-Goals-Calculator.xlsx) (Excel, email so can be used on a computer)

* [Exit Strategy: Succession Planning](https://sparkandlogic.com/videos/exit-strategy-succession-planning/)

Agents learn the benefits of having an exit strategy and explore succession planning as one possible approach. **Facilitator Resource:** [Succession Planning Brokerage Best Practices](https://sparkandlogic.com/wp-content/uploads/2022/10/Successsion-Planning-Brokerage-Best-Practices.pdf)

* [Business Planning: Visioning](https://sparkandlogic.com/videos/business-planning-visioning/)

Step-by-step instructions for helping agents create a vision board that will be a constant reminder of their priorities.

**Handout:** [Vision Board Handout](https://sparkandlogic.com/wp-content/uploads/2022/10/Vision-Board-Handout.pdf) (for note taking)

* [Monthly Goal Setting](https://sparkandlogic.com/videos/monthly-goal-setting/)

Setting goals regularly is linked to improved performance and success. This quick exercise helps agents set and achieve a personal goal and professional goal.

**Handout:** [Monthly Goals Worksheet](https://sparkandlogic.com/wp-content/uploads/2021/06/Monthly-Goals-Activity.pdf)

* [Guest Speaker](https://sparkandlogic.com/wp-content/uploads/2022/07/Guest_Speakers_How_To.pdf) Potential Topics
	+ Investment planning
	+ Income tax planning
	+ Bookkeeping / Accounting tips and best practices
	+ How to monetize your exit strategy
* Potential Guest Speaker Occupations
	+ CPA
	+ Investment Advisor
	+ Bookkeeping Service
	+ Former Agent who sold their Book of Business
	+ YouTube Video: <https://youtu.be/tbr1GK7Jh3g> (14 minutes) *The two agents being interviewed consult with agents either looking to retire or grow their company. The focus is on how to transition your business efficiently and effectively.*

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| Icon  Description automatically generated | **BEST PRACTICE:** During mentoring sessions, ask agents how they have applied the lessons from the practical learning sprints to their business. |

1. Real Estate Trends/Updates (5 minutes)
	1. Market Reports
	2. Production Updates, Listings, Under Contracts, Closings (various ways to share)
		1. Previous month vs. the same period last year
		2. Year To Date (YTD)
		3. Year Over Year (YOY)
	3. Company Data – this information is beneficial to newer agents
		1. Average DOM from List to Under Contract
		2. Average DOM from Under Contract to Close
		3. Average / Median List Price
		4. Average / Median Sales Price
		5. Company’s List Price to Sales Price Ratio
2. Old Business
	1. Updates and follow-up to the previous meeting
	2. “Parking Lot” items from previous meetings

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|  | **BEST PRACTICE:** Use this time to show your agents you are listening AND taking action. |

1. New Business:
	1. “Parking Lot” items from this meeting if time permits. Otherwise, add to next month’s agenda.
2. Next Meeting

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| Chat bubble with solid fill | * Share the next meeting date, time, and location.
* Provide a teaser to build excitement.
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1. Spark Your Business

End your meetings on a positive note! We suggest fun pop bys and other creative ways for agents to *spark their business* and build brand awareness. Choose one idea per meeting or share them all!

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|  | 1. National Donut Day (November 5, 2022) – Pop By
	1. Reach out to your SOI with a small bag of donuts.
	2. Attach a [tag](https://www.etsy.com/listing/1026173523/pop-by-tags-printable-tags-donut-pop-bys?click_key=fbfae3200347fcc32e45b3e9c84048fac1d7f1be%3A1026173523&click_sum=20cda5f8&ref=shop_home_active_17&pro=1&sts=1) and your business card.
	3. Use discount code SPARK20 for 20% off the sample tag and others available from [Front Porch Portraits on Etsy](https://www.etsy.com/shop/FrontPorchPortraits).
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|  | 1. Football Season – Pop By
	1. Give past clients a gift bag with football-themed goodies such as a small football, snacks, or a tabletop football game.
	2. Package nicely and attach a [tag](https://www.etsy.com/listing/1175425021/football-gift-tag-pop-by-tags-favor-tags?click_key=b97847715c9263c969bc01300eec8cf181fd659c%3A1175425021&click_sum=960f0dfe&ref=shop_home_active_5&pro=1&sts=1) and your business card.
	3. Use discount code SPARK20 for 20% off the sample tag and others available from [Front Porch Portraits on Etsy](https://www.etsy.com/shop/FrontPorchPortraits).
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1. Veterans Day Community Service (November 11, 2022)
* Donate your time to help honor those who served.
* Ideas include volunteering with the VFW, dropping off treats for the Veterans Home staff, or helping at the local Veterans Day celebration.
1. National Computer Security Day (November 30, 2022)
* Email your SOI and past clients tips for staying safe online.
* Check out this [Blue Voyant blog post](https://www.bluevoyant.com/blog/cybercrime-types-and-prevention) for information on the top 5 cybercrimes affecting businesses and individuals in 2022.