**Sales Meeting Agenda**  
January 2023

**Management Version**

*The theme for the first quarter is* ***sustainable growth****. During January, we focus on* ***attracting new business****.*

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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.   **HANDOUTS**   * [Agent Agenda](https://sparkandlogic.com/wp-content/uploads/2022/12/agent-agenda-Jan2023.docx) (can be distributed electronically to eliminate paper waste) * [Learning Sprint Handouts](https://sparkandlogic.com/january-sales-meetings-attracting-new-business) |

**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. Agent Contest (5 minutes)

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| Chat bubble with solid fill | [**Pot of Gold Contest**](https://sparkandlogic.com/pot-of-gold-contest-1q22/) – Agents compete to earn the most points by completing actions that will lead them to a pot of gold.  **Contest Announcement**   * Distribute (or email) the [Pot of Gold Contest Flyer](https://sparkandlogic.com/wp-content/uploads/2021/12/pot-of-gold-flyer.docx). * Announce the contest details and logistics:   + Contest dates   + Prizes   + How to sign up   **Contest Launch**   * Hand out and review the [Activity Tracker](https://sparkandlogic.com/wp-content/uploads/2021/12/pot-of-gold-activity-tracker.xlsx) sheets (1 per week for each agent.) * Review the contest rules. * Identify when and where to turn in each week’s tracking sheets. * Highlight the prizes.   **Contest Updates**   * Update your scoreboard with the points agents have earned. * Recognize weekly and overall top point-earners. * Acknowledge exceptional point-earning achievements. * Remind agents when and where to turn in Activity Tracker sheets.   **Contest Conclusion**   * Keep the scoreboard secret until the big reveal. * Make a show of awarding prizes. * Take photos of the winners and the entire group. Post on social media if appropriate. |

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. January Workshop: [Hold an Open House by Design, Not by Accident](https://sparkandlogic.com/january-workshop-hold-an-open-house-by-design-not-by-accident/)

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| Chat bubble with solid fill | * Provide a quick summary of what the workshop will cover to build interest: * *Agents learn how to host a well-attended open house that allows the listing to shine while connecting them to potential new clients!* * Share the workshop date, time, and location. * Special instructions (i.e., lunch provided or bring a sack lunch) |

* 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)*.*

* [**Attracting New Customers**](https://sparkandlogic.com/videos/attracting-new-customers/)

Explore eight methods for building your client roster.

* [**Find Your Real Estate Niche**](http://sparkandlogic.com/wp-content/uploads/2021/12/Find-Your-Niche.png)

Investigate five opportunities to find your real estate niche.

**Handout:** [Niche Market Worksheet](https://sparkandlogic.com/wp-content/uploads/2021/12/NicheMarketWorksheet.pdf)

* [**5 Tips for Real Estate Prospecting**](https://sparkandlogic.com/videos/5-tips-for-real-estate-prospecting/)

This learning sprint showcases five effective prospecting techniques agents can put into immediate application.

* [**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**](http://sparkandlogic.com/wp-content/uploads/2022/12/January-Guest-Speakers.png)

1. Real Estate Trends/Updates (5 minutes)

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| Chat bubble with solid fill | **30-Year Fixed Mortgage Rates: 6.58** (November 2022)   * The Fed’s interest rate mantra for 2023 is shaping up as “higher for longer.” * Unfortunately, we’re likely to feel the pain of a slower economy before we see the gain of lower inflation. * Now is an excellent time to remind your buyers about the 28% rule – you should spend 28% or less of your monthly gross income on your mortgage payment (PITI). * Predictions from experts are looking for rates to top 8% before we start to see inflation slow. * For buyers wanting to get into their dream homes, cash is king.   **Existing Home Sale Rate: -5.9%** (October 2022)   * Existing home sales continued to drop for the ninth consecutive month to an adjusted annual rate of 4.43 million. * Nationwide sales fell just under 6% month over month nationwide and over 28% year over year. * As mortgage rates climbed higher, more potential homebuyers were disappointed that they could no longer afford to mortgage their dream home in October 2022. * The national absorption rate now stands at 3.3 months’ supply of existing homes for sale. What is the absorption rate in your market? * What is your talk track with your buyers?   **Monthly Supply of New Houses: 8.9** (October 2022)   * With interest rates still rising, many builders are opting to lease out their new construction versus selling, hoping that once the Fed stops raising rates, there will be a pent-up demand for new construction. * Absorption rates for new construction hover between 8 to 10 months of inventory. |

* 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

1. 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. |

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 “Cut Your Energy Costs” Day, January 10th (Pop By)    1. Give past clients several energy-efficient light bulbs or night light bulbs. Consider creating and including a marketing piece (large post-card size) with helpful tips to cut energy costs. Examples are changing furnace filters as recommended, keeping the dryer door closed when not in use, using motion sensor light switches, and checking out your utility’s website for promotions and tips.    2. Package nicely and attach a tag 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/FrontPorchPortraits/listing/1354237610). |
|  | 1. National Popcorn Day, January 18th (Pop By)    1. Deliver small gift bags filled with a variety of microwave popcorn, popcorn seasoning, or a small bag of gourmet pre-popped popcorn.    2. Package nicely and attach a tag 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/listing/802504313/pop-by-tags-popbys-gift-tags-popcorn?click_key=92564412e96274d36f898a20d7c79bac81c7af4f%3A802504313&click_sum=027a9465&ref=shop_home_active_13&sts=1). |
|  | 1. Warm Winter Wishes (Pop By)    1. Surprise your SOI with a gift bag containing packets of gourmet coffee, tea, soup mix, hot cocoa, or hot cider.    2. Package nicely and attach a tag 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/listing/1075400748/winter-gift-tags-hot-chocolate-cocoa?click_key=09d582ebe2bc03a13f34fb2f06075d90bd3c0b27%3A1075400748&click_sum=0296439a&ref=shop_home_active_1&pro=1&sts=1). |

1. Closing Statements (mail/email)
   1. Email or mail clients who closed in 2022 the closing statement they will need for their income tax return.
   2. Send before January 31st.
   3. Include a cover letter touching on how much you enjoyed working with them. Tell them why you included a copy of their closing statement (“As you gather tax documents, you’ll want your closing statement handy as you complete your tax return”). Extend an offer to help them with any questions or additional real estate needs.
   4. Make sure to include a couple of your business cards.