**Sales Meeting Agenda**  
February 2023

**Management Version**

*The theme for the first quarter is* ***sustainable growth****. During February, we focus on* ***retaining past clients.***

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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/2023/01/agent-agenda-Feb2023.docx) (can be distributed electronically to eliminate paper waste) * [Learning Sprint Handouts](https://sparkandlogic.com/february-sales-meetings-retaining-past-clients/) |

**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
   4. Agent Sales Contest
2. Marketing Updates (5 minutes)
   1. Company marketing initiatives
   2. Company community service projects and events
   3. Agent marketing opportunities that complement company/brand marketing
3. Education Opportunities (5 minutes)
4. 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)*.*

* **[Grow Your Business Through Client Retention](https://sparkandlogic.com/videos/grow-your-business-through-client-retention/)**

Client retention is key to success in real estate. This learning sprint highlights three easy client retention strategies.

* **[Exceed Your Client’s Expectations](https://sparkandlogic.com/videos/exceed-your-clients-expectations/)**

Explore multiple ways agents can make their past clients feel valued.

* **[Mini-Mastermind: Past Buyers Communications Calendar](https://sparkandlogic.com/wp-content/uploads/2023/01/Past-Buyers-Communications-Mastermind.pptx)**

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

**Handout:** [Mini-Mastermind Worksheet](https://sparkandlogic.com/wp-content/uploads/2023/01/Buyer-Communications-Mastermind-Handout.pdf)

* [**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/2023/01/February-Guest-Speakers.png) **Ideas**

1. Real Estate Trends/Updates (10 minutes)
   1. Market Reports

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| Chat bubble with solid fill | **30-Year Fixed Mortgage Rates: 6.42** (December 2022)   * With the economy more “volatile,” mortgage rates slightly retreated from November’s rate of 6.62. * Freddie Mac believes that while the mortgage market activity has significantly shrunk over the last year, inflationary pressures are easing and should lead to lower mortgage rates in 2023. * Over the past two years, interest rates have risen from historical lows to as high as 7% for 30-year fixed mortgages. The Consumer Financial Protection Bureau observed that interest rates have remained elevated at levels that haven’t been seen for nearly 20 years. What alternative mortgage products have you heard of being recommended to your buyer clients?   **Existing Home Sale Rate: -7.7%** (November 2022)   * Per the National Association of REALTORs, existing home sales fell for the tenth consecutive month to a seasonally adjusted annual rate of 4.09 million. Sales slipped 7.7% from October and 35.4% from the previous year. * The median existing-home sales price rose to $370,700, an increase of 3.5% from one year ago. * The inventory of unsold existing homes retreated for the fourth straight month to 1.14 million at the end of November, or the equivalent of 3.3 months’ supply at the current monthly sales pace (absorption rate). * Tracking your market’s absorption rate could provide beneficial information to buyers and sellers.   **Pending Home Sales: 73.0** (November 2022)   * Pending homes sales decreased for the sixth consecutive month, down 4.0% from October. * Month over month, contract signings declined in all four major U.S. regions. * Pending sales fell in all regions compared to one year ago. * How could you share this information with your clients? |

* 1. 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)
  2. 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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|  | **National Book Giving Day, February 14, 2023 (Pop By)**  Present clients with a relevant book, add a handwritten note on the inside cover, “Thought you would enjoy!”, sign your name, and add your business card. Consider creating and printing a personalized bookmark. Add “February 14th is International Book Giving Day” so your client understands the connection. |
|  | **National Banana Bread Day, February 23, 2023 (Pop By)**  Deliver a nicely wrapped mini loaf of homemade or store-bought banana bread. Example tag available from Esty seller [MadeDesignCo.](https://www.etsy.com/listing/802863145/bananas-about-you-and-your-referrals?gpla=1&gao=1&&utm_source=google&utm_medium=cpc&utm_campaign=shopping_us_e-paper_and_party_supplies-paper-stickers_labels_and_tags-other&utm_custom1=_k_Cj0KCQiA4uCcBhDdARIsAH5jyUlYgLUyWLaKpTZaRe0xQ9TRzgP_7PN_o1eHlEtZbn_onFDxdk0uNlwaAk6-EALw_wcB_k_&utm_content=go_12573081319_122305193249_507799197057_aud-1184785539978:pla-316241129264_c__802863145_12768591&utm_custom2=12573081319&gclid=Cj0KCQiA4uCcBhDdARIsAH5jyUlYgLUyWLaKpTZaRe0xQ9TRzgP_7PN_o1eHlEtZbn_onFDxdk0uNlwaAk6-EALw_wcB) |
|  | **Thinking of You (mail a card)**  Consider mailing a “Thinking of You” card to a select number of past clients. A simple message could read, “Just wanted to send some happy thoughts your way today.” The goal of this contact is to keep the agent top of mind with past clients. To elevate this touchpoint, consider including a relevant article about something the client enjoys or one of their hobbies. A quick note at the top of the article could read, “Thought you would enjoy.” |