

Help your agents ensure personal safety, protect their professional reputations, and safeguard their clients' investments.

Use this checklist and calendar to map out and deliver outstanding sales meetings this month. Write meeting details, tasks, and deadlines on the calendar. Create a pro-active plan and delegate duties as needed.

### Sales Meetings

- Set your meeting date(s)
- Create agendas for each meeting ([management](#) and [agent](#))
  - Select a Learning Sprint
    - [Sharpen Your Buyer Presentation](#)
    - [Risk Self-Assessment](#)
    - [Open House Safety](#)
    - [Safety Culture](#)
    - [Monthly Goal Setting](#)
    - [Guest Speaker](#)
  - Choose a [Spark Your Business](#) idea to share
    - National Cocoa Day, December 13 (pop by)
    - National Cookie Exchange Day, December 22 (pop by)
    - Act of Kindness (community outreach)
    - 2023 Closing Statements (mail or email)
  - Identify other items to include on your agenda
    - Company Updates
    - Marketing Updates
    - Real Estate Wants & Needs
    - Market Trends ([local](#) and [national](#))
    - Sales Contest
- Customize your meeting [PowerPoint](#) or [Google Slides](#) presentation
- [Promote](#) your meeting
- Prepare to deliver

Sun	Mon	Tue	Wed	Thu	Fri	Sat
"Risk comes from not knowing what you are doing." <i>Warren Buffett</i>					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24 Christmas Eve	25 Christmas Day	26	27	28	29	30
31 NYE						

### A Look Ahead

#### January: Attracting New Business

In January, we help agents identify innovative strategies for attracting new clients. Learning sprint highlights include leveraging a real estate niche, using effective call scripts, and tried-and-true prospecting techniques.