

L-10 – Weekly Meeting Jan. 8/Week 1

Segue

(Quick check-in. No rabbit holes.)

Justin – I had whataburger, it was gud

Grant – Just talked about CRM move, going forward with GHL, re-evaluating in 3 months and considering moving forward or alternatives at the end of RS and SISU contracts.

Scorecard

(Just the numbers. No explanation.)

Leads: Closings / under contract: Agent Recruit Leads:

(Anything off track → issues list)

Rocks (Jan. 1 - Mar. 31st)



On Track



Off Track

Grant – Complete CRM Move – Listing Coordinator Define Responsibilities – Advertising/Lead Funnel Refinement – Vendor Program

Justin – Build T3 Recruitment System – Client Moments

Last Week To-Dos



Done



Not Done

Grant: Gen

Justin:

IDS

Issues list

(Brain dump first, then pick the top 1–3.)

1. ~~CRM Platform Meeting~~
2. **Vendor program**
3. **Ad Spend Lead Gen VS. Recruiting**
4. **Additional notecards (congrats, etc)**
- 5.
- 6.

Issue #1

I: Project has stalled, direction is undefined. We want a vendor program, we don't have one. We want to partner and have supplemental revenue for marketing, client nurture, etc. programs and we need support to do this. Lack clarity on what kinds of value would be attractive to vendors.

D: How do we recruit vendors? What are they looking for from us? What is the offer that is so attractive that 85% say yes. Who is responsible for reaching out to the vendors?, At what point in our relationship/business cycle? Should we be building and then finding, or finding and then building. What is our offering? How do we generate revenue in proximity to our vendors? We push business to them. We play favorites. Priority is the client.

S: Build first, expand and attract second. Differentiate within the delivery of multiple vendors which one we wholeheartedly endorse and who we recommend the most (sponsor). Create the actual vendor benefit: ranking system. - Page on our website - Name highlighted without a strong recommendation in our templated emails - Appearance or handout in our closing folders - Sponsor direct mail - Event Sponsorship - Social Media Vendor Spotlights based on Client satisfaction. What is the fee Structure? 3 month recurring. \$15 a month, \$180 annum. Sponsor sold separate. Tiered consideration. Grant is going to create a cohesive document outlining the offering.

Owner: Grant Due date: Next Meeting

Issue #2 - Ad Spend Lead Gen VS Recruiting

I: Where should we be placing our ad spend and marketing efforts? What is the weight or ratio of that spend and effort between the two? We don't have data.

D: We need data to answer the questions. Lead Gen takes precedence.

S: Grant will go collect CPL data to better inform decision making in how much will be required to spend to attract 45 agents.

Owner: Grant Due date: Next Meeting

Issue #3 - Additional Note Cards (congrats, etc)

I: Lots of notable moments within people's lives that we are not celebrating with them. Those are missed opportunities to connect.

D: Generic cards feel less personable, but even just a "congrats" can feel intentional and careful.

S: Congratulations Card Ordered Note Card

Owner: Grant Due date: Next Meeting

New To-Dos (from today)

Grant: - Grant is going to create a cohesive document outlining the vendor program offering.

- Grant will go collect CPL data to better inform decision making in how much will be required to spend to attract 45 agents.
- Congratulations Card Ordered Note Card

Due: 1/15

Justin: ~

Due:

Wrap

What worked today: Person bringing the issue starting the conversation with context and defining the problem. Clarity for topics and priorities. Feel like we are actually moving towards our goals.

What sucked / fix next time: Not having another issue, but that's kind of good too. A little more preparation, now that the process is understood, will be great.

Meeting score (1–10): G 9 | J 8

Parking lot

(Stuff that matters, just not today.)

- Everybody locks the door instead of letting it autolock and go wah wah wah.
-

L-10 – Weekly Meeting Jan. 15/Week 2

Segue

(Quick check-in. No rabbit holes.)

Justin – Justin is now qualified as an amateur video editor with final cut pro. Blood Sweat Tears!

Grant – Grant is in the process of convincing his dad to buy a mustang gt 500 supercharged - its under \$30k, what???

Scorecard

(Just the numbers. No explanation.)

Leads: 14 Closings / under contract: 6 Agent Recruit Leads: 0

(Anything off track → issues list)

Rocks (Jan. 1 - Mar. 31st)

 **On Track**

 **Off Track**

Grant – Complete CRM Move – Listing Coordinator Define Responsibilities – Advertising/Lead Funnel Refinement – Vendor Program

Justin – Build T3 Recruitment System – Client Moments

Last Week To-Dos

 **Done**

 **Not Done**

Grant:

- Grant is going to create a cohesive document outlining the vendor program offering.
- Grant will go collect CPL data to better inform decision making in how much will be required to spend to attract 45 agents.
- Congratulations Card Ordered Note Card

Justin:

IDS

Issues list

(Brain dump first, then pick the top 1–3.)

1. Vendor Program
- ~~2. Listing Coordinator - Refine and Deliver~~
- ~~3. CRM Transition~~
4. Big 455 calendar Dates consideration
5. What to be working - Grant

Issue #1

I: CRM Transition - what are we doing in the interim? Do things change as we make this transition, process, features, system usage? Planning to connect with Andrew on Friday to talk about CRM, value and moving forward. What is the timeline? Do we have a plan for what is first, what is second, etc? What info can we bring over? How, who?

D: Grant I has already started on creating, and executing a plan for the transition. The plan is created, the execution has begun. He stalled, got lost and scared. Essentially tried to start on step 1, got side stalked by step 2, because 1 wasn't possible, and then was confused. Nothing needs to be paused, or halted, things just need to be built in GHL. Run on FUB until functionality of GHL has all follow ups, and communication can be done on the platform. Automations included. We will run the two side by side after GHL is up and running to maintain data.

S: Grant becomes master of GHL. Begin building out automations, and follow ups mirrored from FUB. Justin has discussion with Andrew about agreement and confirm our CRM.

Owner: Justin and Grant Due date: 1/22

Issue #2 - Listing Coordinator - Refine and Deliver

I: What is the responsibility of the agent, and what is the responsibility of the listing coordinator? Where does this standardized process exist? How are we communicating this to the agents? Do they have input? Consideration for future recruits? What are the non-negotiables steps in the listing process? And what would just be cool to have? Is this like a standardized process written down and followed or this just a clarification of roles and responsibilities? Which things are optional and which are mandatory?

D: Expanding on the current listing coordinator SOP. This will be a physical documented process so that it followed and repeatable. Objective is to give the client the best experience possible. Secondarily, sell houses for money fast. Lots of what we do now is in the current SOP,

it just needs to be expanded on and added too. Reporting metrics are a part of it. Property is already being marketed, we just need to communicate that to our sellers.

S: 2 parts:

- reporting for our clients on their listings. Metrics, showings, offers, everything to show we are doing everything we can

- Building the SOP and system to ensure that the process happens the same way every time. What exists now, what can be expanded on along the way, when things happen, and who makes them happen.
- Address Immediately: Reports for listing statistics – Feedback from listings being shows – is the listing menu the best/most attractive way to present our options

Owner: Grant Due date:

Issue #3 - Additional Note Cards (congrats, etc)

I:

D:

S:

Owner: Due date:

New To-Dos (from today)

Grant: - Procedure for showing feedback. First draft redesign of the listing menu. Create the format and process for the L10 for future generations not to suffer

Due: 1/22

Justin: - Clarify the larger vision of the listing coordinator role and process.

Due: 1/22

Wrap

What worked today: it was nominal performance was nominal

What sucked / fix next time: Implement timing system - 15 minutes max. Issues should begin with a GOAL in mind. Should define before we get to the solution. The challenge in discussing a multi-multi project for the first time.

Meeting score (1–10): G 7 | J 5

Parking lot

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