**Sun Realtors Inc. Kickoff Agenda**

**Date:**  *Monday, February 07, 2022* **\***make sure to highlight info in blue

**Intro:**

* Internal team introductions
* Client team introductions
  + …
  + Joseph Spillone is an active Real Estate Agent in Corona, CA with the brokerage Sun Realty. Over the last 9 years [we have tracked 17 MLS listings](https://www.realestateagents.com/agent/joseph-spillone-ca) by Joseph. Joseph mostly represents single family homes around $616K. Joseph is a very effective listing agent selling homes without a price reduction more than 84% of other real estate agents in California.
  + Joseph M Spillone is a licensed real estate broker in the city of West Covina, California. Joseph M Spillone has real estate license number 01491549 which was issued by California Real Estate Department on 05 February, 2016. The current status of license is Licensed (Active) and it is valid till 04 February, 2020. The official mailing address of Joseph M Spillone is 1108 S Shasta St, West Covina, California, 91791. -[READ MORE HERE](https://licensee.io/ca-real-estate/01491549-joseph-m-spillone/)-
* What timezone are you guys in? Just want to be cognizant of future meetings!
  + …
* Talk about client’s pending onboarding tasks
  + Please add Andras as an Admin on your online business accounts:
    - Search engine (e.g., Google and Google Ads)
      * …
    - Social media (e.g., Facebook and Facebook Business Manager)
      * …
    - Any other online accounts integrated to your site/in this project
      * …
* Talk about *partner WhatsApp channel* as means of instant communication
  + Please list your WhatsApp phone number here, if applicable:
    - …

**Client Background:**

* Understanding the clients we work with is one of our top most priorities. With that being said: we would love a quick brief overview of your company.
  + How did this all start – what was the inspiration behind creating all this?
    - …
  + What is the company’s overall mission?
    - …
    - Sun Realtors Inc is a licensed real estate corporation in the city of West Covina, California. Sun Realtors Inc has real estate license number 01866405 which was issued by California Real Estate Department on 07 July, 2017. The current status of license is Licensed (Active) and it is valid till 06 July, 2021. The official mailing address of Sun Realtors Inc is 1108 S Shasta St, West Covina, California, 91791. -[READ MORE HERE](https://licensee.io/ca-real-estate/01866405-sun-realtors-inc/)-

**Key Value Propositions:**

* What are some great product attributes? Things that make you stand out from the crowd / competition!
* …
* How is your price positioning in the market? Are you cheaper / more expensive / right in the middle for pricing compared to your competitors (or the landscape as a whole)?
* …

**Business objectives:**

* What are your core converting audiences? What types of people are you trying to go after, and what types of people have you had the most success with? This will give us some good background for ads.
  + …
* Let’s talk budget – is there a certain monthly ad budget that you prefer to work with? Is there maybe a specific dollar amount that you want to start with? Please keep in mind, we can run an SEO audit on any of your competitors to see their monthly ad spend, plus the industry standard for your ad campaigns’ lead conversion goal(s).
  + ,,,
* Please list both direct and indirect competitors, including company name and/or their respective websites and social media channels below, if applicable:
  + …

**KPIs & Metrics:**

* Breakeven ROAS? If you do not know this, what is your cost of goods? We can find your breakeven together using [this tracking sheet](https://docs.google.com/spreadsheets/d/1PuZZXfTc_3GB4Xm5Km3Z3Gt5cRu6N2J6fg1ryMPhYS8/edit?usp=sharing)
* What is your ROAS Goal?
* How about CPA Goal?
* Average Order Value – are people buying just one product? Or multiples?
* Repeat customer rate

**Design**

* **(only ask if they did not accept a design package)** Do you have a design team that can do both image and video assets? We were able to check out your Facebook ad library – did your design team do this, or was this outsourced?
* **(only ask if they did accept a design package)** Is there anything you want to tell us as far as ad design goes? Is there a certain style that you maybe prefer, or are you more-so okay with us taking control of this?

**SEO Audit:**

* [**https://tinyurl.com/y7pq8hdm**](https://tinyurl.com/y7pq8hdm)
* [**https://tinyurl.com/ydz59qc3**](https://tinyurl.com/ydz59qc3)

**Ending Questions:**

* What time works best for you for the next meeting?
* …

**R2G’s Next Steps:**

* Schedule a weekly meeting
* Create a shared WhatsApp channel
* Strategy call neck week! We will go over a lot of things:
  + Facebook Marketing Plan
  + Google Search Plan
  + Competitive Analysis Doc
  + Website Recommendations (if needed)

**Client’s Next Steps:**

* Leftover onboarding tasks (if any)
  + Sign proposal agreement via Docusign here:
  + Share login information/ admin access your online profiles:
    - Search engine (e.g., Google and Google Ads)
      * …
    - Social media (e.g., Facebook and Facebook Business Manager)
      * …
    - Any other online business accounts integrated to your website(s)
      * …