Agency Development

Agency Development Manager

Name:	
Phone #	
E-Mail:	
	Office Affiliation
Office:	
Office DRE#	01948605
	This Book Belongs to
Name:	
Phone #	
E-Mail:	
Agent DRE#	

WEST SHORES REALTY



WEST SHORES REALTY



REALTOR ON BOARDING CHECKLIST

Completed		Date
	On boarding Meeting with Mentor/ Coach	
	Office affiliation for Mentee's/ Coach choice of Agent	
	Training Schedule	
	Review Shark Academy and Office Calendar	
	E-Mail	
	Most accessible e-mail	
	Business Cards/Name Badge	
	Rapid-o Signs	
	Business Plan	
	Plan, Commit and Set up Accountability	
	Ideal Schedule	
	Create a schedule and commit to it	
	E-Mail Signature	
	Design through Provide Media	
	Head Shot	
	Professional Photographer	
	Intro Video for Website and Social Media	
	Professional Videographer	
	Agent Profile	
	West Shores Website, Zillow and Realtor.com Bio, Photo, Video, Social Media Links	
	CRM/ Lion Desk	
	Free to Board Agents, see Board training schedule	
	Set Up Farm Area	
	Ticor Title	
	Social Media Channels	
	FaceBook team group pages, Face Book business page, Instagram, Linked In, Twitter	



WEST SHORES REALTY



REALTOR ON BOARDING CHECKLIST

Completed		Date
	Social Media Channels	
	FaceBook team group pages, Face Book business page, Instagram, Linked In, Twitter	
	Mailer Introduction Sphere	
	Minimum 50 introductions to the industry	
	250 Postcards to Farm Area	
	Expresscopy.com	
	News Letter	
	Get Creative	
	Board Orientation	
	Real Estate Board Mandatory Training	
	MLS Class	
	Real Estate Board Mandatory Training	
	Supra key	
	Board of Realtors	
	CRMLS Agent Profile	
	My Matrix	
	Zipforms Profile	
	Set up RPA, Listing Agreement Templates	
	Set Up Doc-u Sign	
	docusign.com	
	Set up Open Home Pro	
	openhomepro.com	
	Order Open House Signs	
	rapidosigns.com	
	Order Yard Signs	
	rapidosigns.com	

Welcome to your Elite Agent Planner,

With the right amount of focus, determination and skill you can achieve anything you put your mind too. A business plan is exactly that... a plan in which you will run your daily activities to ensure the end result you desire. By following through on your activities the plan will become your reality. The expectations and commitments of your time, energy and sometimes money should be real and you as a businessperson will benefit from taking your commitments seriously and making them a priority.

We at West Shores Realty would like to welcome you to the first step of creating financial independence for yourself and the people you care about. This business is not easy but nothing worth doing ever is. As you progress through your year please review your commitments, make adjustments where needed and remember that success in business happens daily in your mind and is shaped by your actions.

It is what we do that truly matters not what we say we will do or think we have time for.

WEST SHORES REALTY

Step up and raise your standards...

Sincerely,

Vance Mızzı

Vice President of Agency Development

Year End Goals

Personal Goals	
1	
1.	By:
2	
3	By:
	By:
4	D
5	By:
	By:

Professional Goals	
1	
	By:
2	
	By:
3	Bv:
4	By
	By:
5	
	By:

Three Year Goals

Person	nal Goals
1	
1	By:
2	
	By:
3	By:
4	
5	By:
	By:

Professional Goals	
1	
	By:
2	
	By:
3	Bv:
4	By
	By:
5	
	By:

Five Year Goals

Personal Goa	als
1	
1	By:
2	
3	
	By:
4	
5	By:
	By:

Professional Goals	
1	Dia
2	By:
	By:
3	
	By:
4	By:
5	
	By:

My Business Plan Multiply Step 1 **Gross Commission** Sales Volume Commission by 40 Divide Average Number of Sales Volume Step 4 Step 3 by Average **Transactions Needed Transaction Price** Multiply Transactions by 5 Step 5 Step 6 **Appointments Annual Contacts** Needed Divide Contacts by 45 Divide Monthly Step 7 Weekly Contacts Contacts by **Appointments**

My BIG Why

Reasons and a sense of purpose are what drive us.

Top 10 Reasons to Execute My Plan		
The Benefits of Taking Action	The Consequences of Inaction	
1	1	
2	2	
3	3	
4	4	
5	5	

Marketing Campaign

Strategies:

Prospecting Strategy		
Strategy Description	Frequency	
Cold Call Expired Listings	Weekdays	

Networking Strategy	
Strategy Description	
Join and Attend PTA.	Monthly

Advertising Campaign		
Strategy Description	Frequency	
E-mail my geographic farm.	Bí-Weekly	

Hosting Strategy		
Strategy Description		
One Open House	weekly	

Published/Social Media		
Frequency		
Daily		

Purchasing Strategy		
weekly		

Monthly Plan

Business Projects:

	January	February	March
arter			
First Quarter			
ιĒ			
	April	May	June
arter			
Second Quarter			
Secol			
	July	August	September
ter	July 	August	September
Quarter	July	August	September
Third Quarter	July	August	September
Third Quarter			
	October	November	September
Fourth Quarter Third Quarter			

Activity and

Prospecting

Date	Phone Contacts	Personal Contacts	Open Houses	Mailers	Listing Appts.	Listing Appts.	Offers Written
2/22	45	20	1	50	2	1	1

Production Report

	Marketing					Closing	
Active Listings	Buyers	Mailers	Social Media Posts	Videos	Escrows	Closings	\$ \$46K
2	1	50	2	1	2	1	\$46K

Ideal Schedule

Month Week 1 Week 2 Week 3 Week 4 Week 5

Time	Today	To Do's	Gratitudes
		1	1
		2 3	
		4 5	2
		6 7	3
		8 9	
		10	
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		1 Social Media Video	3
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My Deals

Completed	Date	Address	Buyer	Seller	Volume	Commission
	1/1/20 1/1/20	222 Avenue C. RB			\$1,859,00	\$46,475
					. <u> </u>	
		 				

Things To Do:

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<u>Notes</u>

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		1 Social Media Video	3
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		Offer Written	
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		My Daily Score	3.

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	10 Mailers 1 Listing Appointment	Goals
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	My Daily Score	3

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My Deals

Completed	Date	Address	Buyer	Seller	Volume	Commission
	1/1/20 1/1/20	222 Avenue C. RB			\$1,859,00	\$46,475
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Things To Do:

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<u>Notes</u>

Ideal Schedule

Month Week 1 Week 2 Week 3 Week 4 Week 5

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		My Daily Score	3.

Time	Today	To Do's	Gratitudes
		1	1
		2 3	
		4 5	2
		6 7	3
		8 9	
		10	
		Tasks	Intentions
		My M.E.D.S	1
		My 3 A Days	
		2 Social Media Posts	2
		1 Social Media Video	3
		20 Phone Contacts	
		20 Doors Knocked 10 Mailers	
		1 Listing Appointment	Goals
		1 Buyer Appointment	1
		Offer Written	
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Time Today	To Do's	Gratitudes
	1	1 2 3
	10 Tasks	Intentions
	My M.E.D.S My 3 A Days 2 Social Media Posts 1 Social Media Video 20 Phone Contacts 20 Doors Knocked	1 2 3
	10 Mailers 1 Listing Appointment	Goals
	1 Buyer Appointment Offer Written 1 Listing Signed	1
	My Daily Score	3

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My Deals

Completed	Date	Address	Buyer	Seller	Volume	Commission
	TATA 20	222 Avenue C. RB			\$1,859,00	\$46,475
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Things To Do:

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<u>Notes</u>



Amir Al-Khayat

Broker BRE# 01948605

www.WestShoresRealty.com

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San Pedro

29050 Western Ave. Suite 155-156 Rancho Palos Verdes Ca. 90275

Redondo Beach

1010 Torrance Blvd. Redondo Beach Ca. 90277 Phone: 310-316-6788

Carson

20220 Avalon Blvd. Suite 685A Carson Ca. 90746

Vance Mizzi

Vice President of Agency Development BRE# 01228476 Phone: 424-634-8492

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