*Sales and Escrow Integration – by Lisa Crown*

#1 – Get to know your Sales Executive (get personal)

* AND what are your expectations?
* AND what are your contributions?

#2 – What is your (EO) vision?

* What is your monthly goal?
* What is the culture/vibe of your office?

#3 – Discuss your targets

* Are you in alignment?
* What is your follow-up?

#4 – Execute an appointment to do items on #3

* Get it on the calendar
  + Call maintenance clients
  + Call targets
  + Book appointments
  + Call owners/managers of RE or lender offices
    - Get to know them
    - Ask if you can present in their office
  + Call previous clients (haven’t seen in 6 months or more)
  + Call people with new listings (get a hot sheet weekly)

#5 – Videos!!!

* Do a video with your Sales Executive
* Send 6-10 second videos to parties that “we recorded”
* Send short video to lost clients ”we miss you”

#6 – Ask Sales Executive for updates weekly (quick email with bullet points)

#7 – Huddle meetings with EO and SE

* Have prepared agenda
  + Wins
  + Challenges
  + Questions
  + Growth
  + Action Steps
  + Marketing
  + Compliments/gratitude

#8 – Team up on the non-directing agent

#9 – TURN UP FaceBook!!! (15-30 minutes a day)

* Comment on targets and existing clients posts!
  + Ask a question
  + Show interest or relate
  + Give a suggestion
  + Be matter of fact

#10 – Build a business with your Sales Executive

* Choose to be happy ☺
* Choose to be open
* Choose to build business
* Choose to be partners