LJ Hooker Home Loans

Example Schedule: Office & Agent Touch Points

Objective:
To establish a consistent presence, build strong relationships, and provide value to the real estate team while ensuring seamless communication and support for mutual clients.

Weekly Schedule

Monday: Preparation & Planning

- **Time:** Morning
    - Review priorities for the week, including office visits, open home schedules, and agent follow-ups.
    - Prepare marketing materials for office displays, open homes, and agent meetings (e.g., brochures, flyers, guides). *If required*

Tuesday: Office Visit & Team Engagement

- **Time:** 9:00 AM – 11:00 AM *(Or otherwise agreed based on Office schedule)*
    - Visit the real estate office to engage with the team.
    - Conduct a brief team update, sharing insights on market trends, lending updates, or upcoming joint initiatives.
    - Replenish office displays with updated marketing materials (e.g., home loan guides, rate cards). *If required*
- **Touch Points:**
    - Connect with individual agents to discuss active client needs or financing solutions.
    - Highlight any special promotions, bridging loans or pre-approval opportunities to share with their clients.

Wednesday: Individual Agent Follow-Ups (Multi-Channel)

- **Morning:**
    - Send personalised follow-up emails to agents, summarising discussions from the office visit or touch base if you missed them on the day.
    - Provide resources like client-facing brochures or links to digital content.
- **Afternoon:**
    - Make phone calls to agents who may need deeper support, such as help with financing solutions for specific clients or upcoming auctions.

Thursday: Market Presence & Agent Support

- **Morning:**
    - Provide personalised pre-approval updates for clients connected to agents.
    - Touch base with agents about Saturday open homes to confirm attendance and marketing support.
- **Afternoon:**
    - Use social media or email to promote upcoming open homes and share content with agents to share with prospective buyers.

Friday: Relationship Building & Preparation for Open Homes

- **Morning:**
    - Host a coffee catch-up or informal meeting with a key agent or principal to strengthen the relationship and discuss any immediate needs.
- **Afternoon:**
    - Finalise materials for Saturday's open homes, including client-facing brochures, home loan guides, or rate cards.
    - Confirm with agents the details of open homes you plan to attend.

Saturday: Open Homes & Market Presence

- **Time:** 10:00 AM – 2:00 PM
    - Attend scheduled open homes hosted by key agents.
    - Be available to answer finance-related questions from prospective buyers and reinforce your role as a trusted lending partner.
- **Touch Points:**
    - Provide printed materials for prospective buyers (e.g. First Home Buyer guides, home loan checklists, pre-approval flyers).
    - Build rapport with buyers while strengthening relationships with agents through active support.

Monthly Focus:

- Keep Office Display materials fresh by rotating materials – complete while on a routine office visit or use as an excuse to visit the office
    - Can you sit in an office for the day (Weekly or monthly) and be part of the team?
- Host a Lunch & Learn session or workshop for the real estate team on lending topics, such as:
    - Key lending trends and market updates.
    - Tips for guiding buyers through the pre-approval process.
    - The benefits of promoting pre-approved buyers at open homes.

Touch Point Tips by Medium

1. **Face-to-Face Meetings (Weekly):** Build rapport and establish personal connections.
2. **Phone Calls (Weekly):** Address urgent needs or high-priority clients, check-ins.
3. **Emails (Weekly/Monthly):** Share insights, updates, and co-branded resources with agents.(e.g. Monthly Market Newsletters from ActivePipe, RBA Changes, Rate changes, Product Specials)
4. **Open Homes (Weekly/Monthly):** An extra pair of hands at Open Homes can be great for agents - The first one is usually the best one to attend and always have a plan when you are not there (e.g. Open Home Kit/Satchel for each agent to make it easy for them)
5. **SMS (Ad-Hoc):** Provide quick updates or reminders for time-sensitive opportunities.
6. **Social Media (Ongoing):** Share success stories, market insights, and educational content to stay top-of-mind.

This schedule ensures a proactive and visible presence in the real estate office while maximizing support during high-impact times like open homes.