Best Agent Business - New Client Checklist Day 10-30

Client Name:_________________________ Checklist Completion Date:___________________

The Day 10-30 Checklist is an important step to ensure that all required tasks and documents have been completed and returned. Once you've completed this checklist, please email the document to your assigned Key Assistant.

Note: *Please ensure you always have your checklist in front of you when you are speaking with someone at Best Agent Business. Also, please advise that per your signed service agreement you are to dedicate 2 hours/week to Best Agent Business for completing all projects. If you're not using any services (i.e. Marketing, Lead Management, Closing, Calling), you can put N/A in 'date completed' box.*

Checklist Item	**Details**	**Date Completed**
Billion Dollar Agent Plan	Attend call with Steve Kantor. During this call we will discuss lead management.	
Marketing Team	Attend your Marketing Kickoff Call. Review and approve Marketing Plan once sent after call.	
Lead Management	Attend your Lead Management Kickoff Call. Review and approve Lead Management Plan once sent after call.	
Closing/Listing Management	Attend your Closing Management Kickoff Call. Review and approve Closing Plan once sent after call.	
Calling Team	Attend Calling Team Kickoff Call. Review and approve calling script once sent after call and have your first call with your assigned caller.	
Logins	Login plan complete with a decision of which systems to keep, improve upon, and others which aren't needed.	
Financials	Financial plan is complete with budgets for the coming year.	
Weekly Lead Action #1	Complete your first Weekly Lead Action report and return to your Key Assistant and Lead Management Assistant. Continue doing so weekly.	
Database Coding	Complete your first Database Coding file (5 hours work) and return to your Key Assistant and Lead Management Assistant.	
Monthly Database Summary Review	We have sent your first Monthly Database Summary. Review this snapshot of your database and confirm that you've received it.	

Please cc' your Key Assistant on all emails and reply all when emails are sent to you. This ensures your Key Assistant stays in the loop, as well as any other teams that need to know status of work.