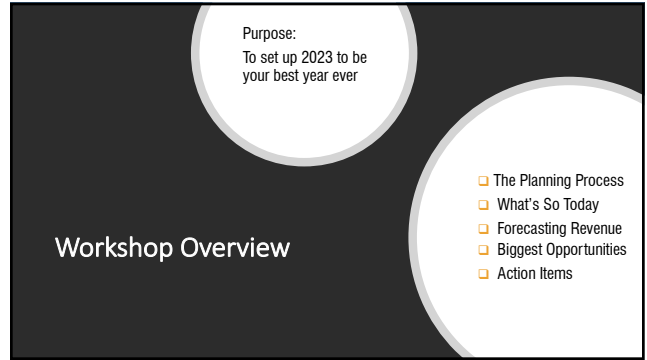
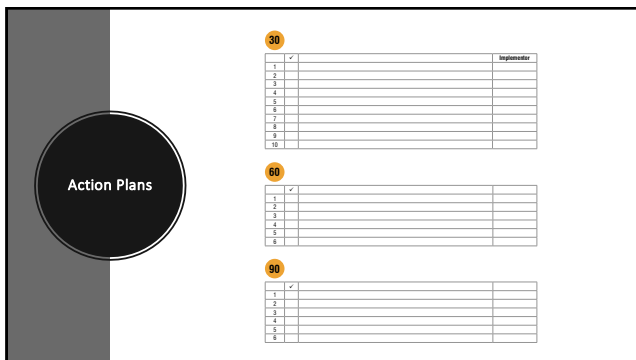




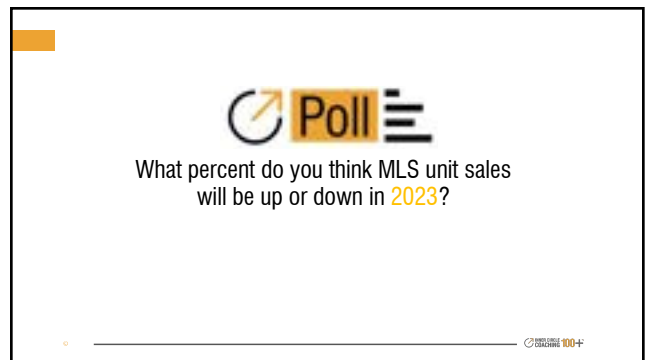
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What do you think are your biggest threats in 2023?



5



What are your biggest opportunities in 2023?

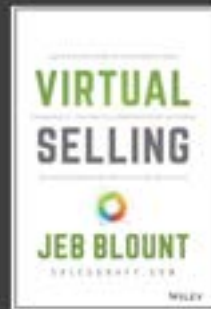


6

Information for 2023 Strategic Plan

- 2022 Recruiting Results
- 2022 Retention Results
- 2022 Productivity Results
- Other Wins
- Other Threats

7





Recommended Read

8

Information for Next Meeting

For the period beginning January 1, 2022

1. Number of experienced agents recruited and where they came from
2. Number of new agents recruited
3. Number of appointments executed with experienced agents
4. Number of appointments executed with new agents
5. Number of agent appreciation events
6. Number of value-add touches
7. Number of social media posts
8. Number of relationship conversations (phone call or I/M)


9

Opportunities & Risks Matrix

EDI Enterprise Performance Group

The shifting market in 2023 will provide some unique opportunities that will only appear in a shifting market. At the same time there will be things that you need to be concerned about. By listing both your opportunities and concerns, you can get a clear picture of what needs to be dealt with and also what needs to be included in the upcoming Strategic Plan and Budget.


	Opportunities	Risks
High impact on the organization		
Low impact on the organization		



10



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- **Recruiting:** Experienced agents, team agents, focused competitor recruiting
- **Managers/Recruiters:** Recruiting competitors' managers
- **Owners and Partners:** Acquisitions & Mergers
- **Space:** Rationalizing space

12



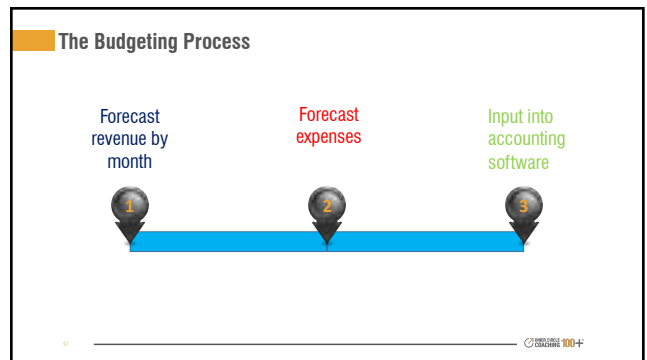
13

- **Productivity:** Experienced agents, team agents
- **Retention:** Keeping our agents happy
- **Cash Flow and Profitability:** Acquisitions & Mergers
- **Retention:** Salaried staff

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INNER CIRCLE COACHING OS

- ❑ Cash Flow Calculator
- ❑ Seasonality Wizard
- ❑ Agent Contribution Wizard
- ❑ Agent ERP
- ❑ Budget Wizard

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90-DAY STRATEGIC ACTION PLAN EDI

NAME: _____

DATE: _____

AGENCY: _____

AGENCY TYPE: _____

AGENCY SIZE: _____

AGENCY TYPE: _____

AGENCY SIZE: _____

AGENCY TYPE: _____

AGENCY SIZE: _____

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INNER CIRCLE COACHING

Recruiting Club

UPDATE: October 2022

The Fall Recruiting Season

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Next Recruiting Club Workshop EDI

November 2022

Tuesday November 22, 2022

2:00 PM EDST

Inner Circle Coaching

20

