

Our Transition Plan

The following plan has been designed for you to use as a checklist to make your move as smooth as possible, so, instead of losing business, we help you increase it during your move!

2-3 weeks prior to your move:

Date Completed

1. Complete paperwork with our _____. Include license transfer, although this will not be given to the Real Estate Commission until the day of your move. _____
2. Order business cards with your picture. Do you need a new picture? _____
We have a recommended photographer, if you wish.
3. Order announcement postcards for your sphere of influence and farm area. _____
To save you time, we will send up to 200 of them for you, including labeling and stamps. Just provide the contact information to us in your database. _____
4. Update your database. If you don't have your valued clients in a database now, we'll dedicate someone to create a database for you using one of our recommended software programs, and we'll input up to 200 people into your database—our compliments! Just give us their contact information, and we'll get you organized, so you don't lose any business or time. _____
5. Prepare a press release using our form. Or, give us the information verbally, and we'll write a press release and submit it to our list of media. We want to promote you! _____
6. Review your independent contractor agreement to see how current transactions and listings are treated. _____
7. Order name riders for your for sale signs or personalized for sale signs _____
8. Prepare a new personal brochure and take to a printer. _____
9. Work with your web master to have your web site updated. _____
10. Do you have bus benches/other promotions that need to be changed? _____
11. Read policies and procedures manual. _____



12. Use our education calendar to choose the education events you want to attend to keep your career moving upward. _____

13. Meet with our manager to counsel with you about your goals and update your business plan. _____

1 week prior to your move:

- 1. Work with our staff to get your announcements out. _____
- 2. Prepare new listing agreements for any listings that you are going to retain _____
- 3. Pack up all non-essential items and start moving some things each day _____
- 4. Do an orientation walk-through of the office with our office manager. Discuss office procedures, so you won't be slowed down later. _____

Day of your move:

- 1. Take mailings to post office (or, we will do that for you).
Assure emails are sent of your announcement to your circle of influence. _____
- 2. Notify the office staff at your past company of your move and your new phone number _____
- 3. Have your web site changed to _____
- 4. Take your license transfer to the real estate commission _____
- 5. Change your for sale signs (we will order for you). _____
- 6. Have new listing agreements signed _____
- 7. Move remaining items from your past company and move to new location _____

Week after your move:

- 1. Start calling your sphere of influence - to give them the good news about your move - this is a great opportunity to ask for new business _____
If you want us to call them, we will call up to 100 of your sphere of influence (from your database), and let them know you are with us—and ask for leads!

