



Ashley –Hollis New Member Onboarding Plan

Associate

Job Description:

To **identify**, research and target potential prospects for the Team. To qualify, **contact** and schedule meetings with prospects and over time to **cultivate** them into high value relationships that can become clients or lead to other prospects. To **manage** and track the prospect records, all contact with them and future follow ups and tasks using Salesforce.

I.Strategy for Success:

Success will be achieved through the development of a knowledge about the Market's companies and industries that are growing or evolving and by being aware of and leveraging events that impact them such as changes in leadership, M&A, expansion or contraction, changes in business or lease expirations. Success will be measured in contacts made with prospects and meetings scheduled. The knowledge of our Company and its resources, and the local real estate market and its key players established through the Development Program below, will ensure success.

II.Responsibilities:

Daily:

- Read – Local periodicals, CoStar Report and any other online resources for business activity
- Monitor Salesforce for activity
- Check RTS (Relationship Tracking System) for new company clients
- Monitor social media – especially LinkedIn for job changes and updates

Weekly:

- Attend Team meeting at 8:45 each Monday
- Meet with Sales Manager at 10:00 each Monday to set goals for the week (starting in Phase II)
- Meet again with Sales Manager Friday morning at 10:00 to wrap the week and discuss progress
- Meet with Team Lead each Wednesday at a TBD time to discuss progress

General:

- Canvassing and Business Development (a Business Development Plan is to be developed during the Development Program and attached hereto)
- Responsible for researching prospect companies and industries (create a "prospect brief" form)
- Development and maintenance of prospect list and information in Salesforce
- Market knowledge (current information on tenant activity, new developments, and overall market information, etc.)
- Responsible for investigating and suggesting new tools which would benefit the Team

III. Development Program

Phase One – Internal Knowledge Development (60 days)

A) Rotation (time spent with each of the following, see attached schedule)

- First Day Introductions
- Salesforce
- Research
- Financial Consulting
- Project Management
- Agency Leasing
- Property Management
- CIS
- Workplace Strategy

B) Projects (to be worked on as necessary to be completed at end of Phase One)

- Develop a Submarket “Dashboard” for selected submarket focus
- Develop a Google Earth “City Overview”
- Review team files and abstract leases; put critical dates in Salesforce. Start with two that have already been completed and compare your abstract to those already done. Make sure to update team critical dates spreadsheet

Phase Two – External Relationship Development; Landlords and Leaders (30 days)

A) Begin sales training led by Sales Manager and Team Lead

B) Begin working on transaction(s)

C) Reach out to and meet at least 10 owners, developers and agents for major office properties (including all in selected focus submarket)

D) Reach out to and meet at least 10 civic and business leaders

E) Develop personal VIP list of contacts

F) Draft a Business Development Plan

DEVELOPMENT PROGRAM PHASE ONE SCHEDULE			
Dates	Activity	Contact Person	Goals
Day One	First Day Introductions		Get the feel of the office and learn basic procedures.
Week One	Research		Learn our capabilities, data sources work product. Know basic terminology
Week One	Salesforce		Learn how C&W uses this software.
Week Two	Financial Consulting		Learn how we analyze deal cash flows for both private and public companies. Learn ProCalc.
Week Three	Project Management		Learn the tenant build-out process including programming, design, pricing and construction.
Week Four	Property Management		Learn how buildings work including terminology, major systems and major maintenance process.
Week Five	Agency Leasing		Learn how landlords think. And what motivates them.
Week Six	CIS		Learn capabilities and how we service major accounts.
Week Seven	Workplace Strategy		Learn what this team does and why their service is valuable.