

Sample Client Status Report

Sample Summary

Last Update: November 24, 2002

Web based 800 System

1=high priority 5=low priority

Who	Priority	Status	Action Item
PJ	1		Configure system to take a message or forward call to agent office
PJ	1		Document how to forward calls or retrieve messages
PJ	5		Set up additional mailboxes for agent's team
PJ	2		Create sample Fax On Demand
PJ	2		Create sample Voice On Demand script
M	2		Send PJ Publisher file for Fax on Demand design
PJ	2		Assign marketing series numbers to track results
M	2		Send PJ list of active properties w/descriptions
PJ	2		Create FOD for all active properties
M	2		Create VOD for all active properties
PJ	2		Document how to create FOD and VOD

Web Posting

1=high priority 5=low priority

Who	Priority	Status	Action Item
M	2		Send PJ a list of where homes are listed and what is done
PJ	2		Review and create a streamlined process
PJ	2		Create a QC process for assistant

Check it Out

1=high priority 5=low priority

Who	Priority	Status	Action Item
PJ	2		Check out Real Estate Power Tools – CD listing product
M	2		Send PJ contact info for CD listing
PJ	2		Check out myonlineneighborhood.com
PJ	2		Send info Marketingre4u.com
PJ	2		VirtualTour.com
PJ	2		Imprev.net
PJ	1		Send pdf info to agent

Technology Related

1=high priority 5=low priority

Who	Priority	Status	Action Item
M	2		Send PJ all email accounts and what computer they are on
M	2		Send PJ contact for Internet Crusade
M	2		Send PJ info on mortgage techies; discuss goals with techies
M	1+		Set up connected.com

Website Related

1=high priority 5=low priority

Who	Priority	Status	Action Item
PJ	2		How to setup auto responder ; attachment of weekly property
PJ	2		Increase website search engine rating
PJ	2		Make website more "sticky"

Marketing

1=high priority 5=low priority

Who	Priority	Status	Action Item
M	2		Send samples of all marketing materials
PJ	2		Define and design emarketing plan
PJ	2		Design and implement estationery for team

Computer Network Goals – discuss with tech support

Setup workgroup
 Verify firewall
 Verify Norton Corporate Anti-Virus configured with auto-update daily
 Make a server for network group; 2 printers configure to share
 Backup – connected.com for server

Training Needs

Outlook training for all team
 Productivity tools only for now
 Publisher – creating FOD for new listing
 Online open house feedback system