

MEETING AGENDA

Logistics

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| Time: | 9:00 am |
| Date: | 10 May 2023 |
| Meeting: | Monthly KAM Meeting |

Discussion

| No | Discussion | Presenter | Status or comment |
|----|---|-----------|--|
| 1 | MTB and Sponsors | Maryna | <ul style="list-style-type: none"> Sponsorship proposal have been approved. Please note when liaising with clients only once payment has been received they will receive spot Liaise with Annetjie and Maryna regarding MTB Leani added that coffee sleeves have been loaded on Extranet. Can order MTB one by driving MTB by giving agents a coffee Anyone that has secured prizes or goody bags. Please send to Natalie |
| 2 | Uphawu | Maryna | <ul style="list-style-type: none"> For Mandela Day the aim is to collect shoes for kids (No More Bare Feet Campaign) Marketing will share social media posts to create awareness Each KAM arrange own event Maryna will send out proposal |
| 3 | A4 Plastic Case | Leani | <ul style="list-style-type: none"> Red ones have been discontinued Introduced new clear plastic case Clips only works if there's something in |
| 4 | Data Management/ KAM Request/ Birthday Mailer | Leani | <ul style="list-style-type: none"> KAM's voiced data issue I am meeting with Brent to address this and implement a better system and can execute correctly to avoid this issue |
| 5 | New Staff Marketing Information Session | Leani | <ul style="list-style-type: none"> KAM will sit with new staff members to ensure all is on the same page One session a month to familiarise with STBB Branch |

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|----|--|-----------|---|
| 6 | Banners | Leani | <ul style="list-style-type: none"> Introducing extranet booking system for banners Would also like to address the way we receive banners back which at times is not in a good condition For each KAM to be mindful and take responsibility to ensure the condition is OK We will do a video showing how to set up the banners to avoid any damage Barcode system and GPS tracker |
| 7 | PDE 4/Logbook Training KAM (Preparation) | Leani | <ul style="list-style-type: none"> Watch video as well as get conveyancers to watch as well Natalie added to please refrain from recreating list and being sent out |
| 8 | LinkedIn Review | Leani | <ul style="list-style-type: none"> We worked through all professionals, KAM's and CA's profiles. We will assist with setting it up and to make sure everyone is on LinkedIn |
| 9 | Note to all | Leani | <ul style="list-style-type: none"> At the Conveyancing meeting last week it was advised that we refrain from using "Retail Conveyancer" to "Real Estate Conveyancer" We will send out mailer regarding new term |