

MEETING AGENDA

Logistics

Time:	9:00 am
Date:	12 July 2023
Meeting:	Monthly KAM Meeting

Discussion

No	Discussion	Presenter	Status or comment
1	MTB	Natalie Leani	<ul style="list-style-type: none"> • Entries are really low • Please send prospectus to agents to take water points • Advertise where there are no costs involved • Brochures will be printed and have by Monday • Drop off at local places to get more exposure
2	Legal Update	Leani	<ul style="list-style-type: none"> • Had meeting at length with professionals regarding if there's a need and professionals felt there is. Darren stated each department should contribute next year. • KAM's added different training should be added such as bank and agency training, rookie workshops etc
3	Sign Up/ Email Address	Leani	<ul style="list-style-type: none"> • We done a cleanup on our end to seven categories. • Drive agencies to subscribe to our lists and join the STBB community.
4	Data	Madelaine Leani	<ul style="list-style-type: none"> • Asked if all agents have been allocated • Lauren stated lists were not sent • Get Monica to draw agents to each KAM • Manually update and Brent will decide
5	Office Signage	Leani	<ul style="list-style-type: none"> • Feedback – it's been a back and forth with different suppliers regarding printing, stickers and plaques. We would like to send out by this month.

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6	Certificates	Leani	<ul style="list-style-type: none"> • Clarity on generating National training/Webinars • I have access to the attendance and participants list. We have had people log in for 10mins then want a certificate and we have 90% policy. • For national training KAM's cannot generate certificates please refrain from doing so as it affects the credibility of STBB.
7	Mortgage Originator Marketing	Leani	<ul style="list-style-type: none"> • Discussed at length how we can get more bond work and get more mortgage originator • What are KAM's doing? All KAM's hosts MO events, including legal updates, take individual MO's out or lunches • Annetjie added if all branches can summit lists of MO you deal with for Uber and Better Bonds to Leani by Friday. As we would need lists to invite for Women's Day.
8	PDE 4	Madelaine	<ul style="list-style-type: none"> • Dates 25 July – 27 July for August exam • We will share schedule who will be presenting and get KAM's to host with Associates. • We would schedule training for next week.
9	YBG	Madelaine	<ul style="list-style-type: none"> • Based on poll on KAM Group and everyone is happy with offering. • Issue on our end is that catalogue is updated monthly and it takes 12 hours to upload all new items. At the moment we don't have the capacity. • Suggestion to change catalogue every 3 months and many KAM's agreed.
10	KAM Bosberaad	Leani	<ul style="list-style-type: none"> • Venue either at Claremont or Cape Town Branch. • Starts 8 am and lunch in the afternoon • Please have your ideas, plan and strategize in advance so we can get the job done.

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11	Rugby WhatsApp Emoji/Stickers	Leani	<ul style="list-style-type: none"> Request from Vanessa If you have anything you, please send so we can start working on that.
12	Property Cost Leaflet	Leani	<ul style="list-style-type: none"> They have been sent off Leaflets have QR code on top