

# *ADvantage-SOLutions*

## **Possible Fast Start Timeline**

### **Month 1 - Identification Discovery**

**In month one we can include:**

- 1) Realtor Referral**
- 2) Cross Selling**
- 3) Team Selling**
- 4) Identify targeted products/services**
- 5) Identify target markets**
- 6) Competitive Research**
- 7) Identify what makes you unique/your differences**
  - a. Price/ease/speed/special**
  - b. Realtor Support**
- 8) Identify benchmarks and measurement methods**
- 9) Build tracking devices and procedures**
- 10) Logo Development**
- 11) Develop Marketing Concept**
  - a. Slogan**
  - b. "Hook"**
- 12) Contact List (per bank officer) Defined**
- 13) Method of gaining internal buy-in and participation**
- 14) Develop Incentive Program**
- 15) Rework Existing Bonus Structure**

### **Month 2 - Development**

- 1) Communication Supplies (as required)**
  - a. SALES PACKETS, applications on flash drive**
  - b. Business Cards, Letterhead, brochures, thank you cards, flyers, signage per branch**
  - c. "Shell" letters to be customized per officer**



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## **2) Roll out Incentive program**

- a. Launch/Event**
- b. Training**
- c. Manual Order System**
- d. Manual Tracking System**
- e. Daily/Weekly/Monthly Reinforcers**
- f. Communications**
- g. Customer Incentive**

## **3) Public Relations**

- a. Press Releases**
- b. Announcement(s) on Website**
- c. Event Planning**
- d. New “splash” Ad campaign**
  - Newspaper – radio – local TV – banners - flyers**
- e. Radio Talk Shows**
- f. Tactical Sales**
  - i. Face to face**
  - ii. Local flyer distribution**
  - iii. Local Organizations (announcements/support)**

## **Month 3 - Relationship Building**

- 1) Loan Officer Calls & Visits**
- 2) Event/Unveiling Invitations Mailed**
- 3) Follow up calls**
- 4) Information Distribution Contests at Branches**
- 5) Promotional Item(s) Selection**
- 6) Internal Motivation Pieces**
- 7) Branch displays (bulletin boards)**
- 8) Banner adv at bank branches**



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## Month 4 - Relationship Building

- 1) Events/Unveilings Held
- 2) Press releases, articles
- 3) Direct Mail Campaign begins
- 4) Focused Loan Officer Calls & Visits
- 5) Tracking Results
- 6) Monthly Breakfast Meetings w/Realtors begin

## **On-going proposals:**

- 7) DVD development (testimonials, success stories, bank adv)
- 8) Exclusive Catalog development
- 9) Newsletters
- 10) Internal Sales Incentive
- 11) Travel Club improvement plan
- 12) Other product branding and marketing
- 13) Support for meetings
- 14) Ongoing Ads
- 15) Special Event Planning
- 16) Identifying new prospects