



# Welcome to Sloan Properties

Your First 30 Days

## A message from Morgan Sloan

Welcome to Sloan Properties. I'm glad you're here. This brokerage was built for agents who want real support, real technology, and a real partnership with their broker. The next 30 days are about getting you set up, trained, and ready to hit the ground running. I'm with you every step of the way.

— Morgan Sloan, President & Broker

## Week 1 — Getting Set Up

Your first week is about foundations. We'll get you plugged into every system and make sure you have everything you need to start strong.

- CRM account created and login credentials provided
- Brokerage email setup (@sloanproperties.com)
- Business card order placed
- Professional headshot scheduled
- Introduction to the team — meet your fellow agents
- Office tour and key access (if applicable)

## Week 2 — Systems Training

Now that you're set up, we dive into the tools. These sessions are hands-on — you'll leave each one ready to use the system on your own.

- Full CRM walkthrough — contacts, pipelines, and dashboards
- Campaign setup — create your first automated email sequence
- Contact import — bring your existing database into the CRM
- Transaction management overview — how deals flow from contract to close
- Lead enrichment tools — finding and qualifying prospects

## Week 3 — Business Planning

With your tools ready, we build your business plan together. This is where strategy meets action.

- Sphere of influence outreach — identify and organize your network
- Farming strategy — choose your geographic or demographic focus
- Lead generation plan — map out your prospecting activities
- Listing presentation practice — rehearse with broker feedback
- Goal setting — define your 90-day and annual production targets

## Week 4 — Launch

You're ready. Week four is about going live and making your presence known.

- First open house scheduled and promoted
- Social media launch — announce your new brokerage home
- Sphere announcement — let your network know where to find you
- First CRM campaign enrollment — start your automated outreach
- 30-day check-in with Morgan — review progress and adjust the plan

## Key Contacts

Name	Role	Phone	Email / Link
Morgan Sloan	Broker / Mentor	(321) 895-8484	Morgan@SloanProperties.com
CRM Support	Technical Help	Via CRM chat	crm.sloanproperties.com
Marketing	Campaigns & Materials	Via CRM	Morgan@SloanProperties.com

## Resources

Resource	Link	Description
Sloan CRM	crm.sloanproperties.com	Your daily command center for contacts, campaigns, and transactions
Brokerage Website	sloanproperties.com	Company info, listings, and lead capture
Florida DBPR	myfloridalicense.com	License renewal, CE tracking, and regulatory info

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Welcome aboard. Let's get to work.

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