



# The Darryl Turner Corporation

## Full Branch Sales, Recover and Retention Initiative Plan

When designing a complete sales & revenue expansion or recovery initiative, it is important to avoid the largest mistakes most commonly made.

They are...

- Not assigning branch revenue responsibility directly to the branch manager
- Not training branch managers how to manage the financial aspects of the business.
- Assigning branch order count responsibilities to the sales rep
- Thinking that retention is a sales rep responsibility
- Not having inside escrow officers/closers follow an initiative and be responsible to retain their own customers
- Sending sales reps to recover lost customers,
- Too easily and regularly pulling outside salespeople in to fill a missing employee role in the office.
- Looking primarily to sales people and not branch staff when the overall order count is insufficient.

To develop the “Full Sales Initiative” it is important to remember that sales people have a primary responsibility to generate new customers sending new orders. It is also important to remember that escrow officers/closers must be fully responsible for their regular customers returning. Although each can support the other, they cannot facilitate the other’s role.

Inside staff (Escrow officers/closers) tends to direct salespeople toward those individuals who they have not seen business from in a while. If the salesperson makes sales calls on these individuals to attempt to recover them, it typically amplifies the problem. The customer perception is that a third party came by to tell them how important they are to someone else. They receive the message as “they are **almost** important enough for the escrow officer/closer to call themselves”. The problem is now bigger.

Retention of customers is determined by the quality of work and relationship that escrow officers/closers have with their customers. This means that they must be in regular proactive communication with their customers **especially** when they “are **not** in a transaction”. This is defined as “**Out of File Communication**”.



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The steps are simple. An escrow officer/closer would develop a list of their top 10-20 customers. Each day they would review that list and look for the next person down on the list who is not currently in a transaction with them. They would then simply call the customer and check in. They may decide to use a script such as this example:

*"Hi John, this is Betty Jones with Quality Title. How are you?..... I wanted to check on you as I haven't heard from you lately and have missed working together. Is business going well?..... Well, I won't keep you, but I did want you to know how important you are to myself and to Quality Title. John, what might you be working on now that I can help you with or go ahead and open a file on.....?"*

Most escrow officers/closers would state that they are in communication with their customers all the time, but when asked how often they proactively call a customer when they are "Not" in a transaction the answer changes radically.

Since it takes the average title company approximately 70 to 100 days to realize that a customer's business is trailing off or gone, the client is contacted significantly too late and the customer already feels devalued. The typical result is a lost customer. The company then sends a sales rep (not the one who the relationship is with) to tell them how important they are to the one not reaching out to them. This is the typical model, also the most dysfunctional.

The solution is simple. It uses the 80-20-80 formula. The salesperson person's primary (80% of their time) full responsibility is spent prospecting and building the customer base. The remaining 20% is utilized to support the retention efforts of escrow officers/closers, but not to replace the efforts. The opposite is true for escrow officers/closers. 80% of their focus is on customer retention (which requires good technical work so that is included in the 80%) while 20% of their time and focus is to support the outside sales initiative as they need information, etc. to facilitate the sales process.

**Warning: Operating outside of the above proven method, will not recognize the rapid recovery desired, thus requiring the above initiative to be in place for the most impacting and sustainable results. Deviation from the above model is not recommended in any version or capacity.**