STRATEGIC WORKING PROPOSAL / NOVEMBER 13, 2026

PACIFIC COASTLINE
ESCROW

Business Development & Growth Strategy

A focused 90-day plan to strengthen agent relationships, create new business opportunities, and build a repeatable growth engine.

PREPARED BY

Lauren Cinar
Business Development & Community Relations

PREPARED FOR

Meny Atias
Pacific Coastline Escrow

PRIMARY FOCUS Calabasas + Chatsworth

ADDITIONAL GROWTH South Bay + Long Beach + outside brokerages

STATUS For discussion; initiatives, budgets and targets subject to approval

01 / BUSINESS DEVELOPMENT STRATEGY

Executive strategy

Where we are now, what changes over the next 90 days, and how success will be defined.

The opportunity

I want to build on the relationships and credibility I already have, while developing a consistent, measurable approach to new business. My role will be to connect with agents, understand their needs, coordinate an excellent escrow experience with our team, and create reasons for professionals to stay engaged with PCE.

Current momentum

WHAT IS UNDERWAY	CURRENT STATUS
Existing network	Two weeks of direct outreach and transition conversations with agents from Team LA
Meny introductions	Three agent introductions; one meeting completed, two to schedule / complete
Territory	Calabasas and Chatsworth as primary focus; flexibility to expand across PCE offices
Support	Meny open to new programming, events and collaboration with escrow officers

Four growth priorities

01 RETAIN & REACTIVATE

Continue transition outreach; rebuild dormant relationships; protect existing agent trust.

02 DEVELOP NEW PRODUCERS

Target top producers, emerging agents, teams and selected outside brokerages.

03 DIFFERENTIATE SERVICE

Pilot a responsive, high-touch agent experience supported by escrow officers.

04 CREATE COMMUNITY

Make PCE visible through purposeful events, useful education and professional connections.

90-day definition of success

A prioritized agent pipeline, a live concierge pilot, a repeatable event format, and clear reporting on agent activity and new escrow openings. Opening-volume targets will be set with Meny after reviewing the current baseline.

02 / BUSINESS DEVELOPMENT STRATEGY

The agent growth engine

A relationship-driven system that is practical to operate and can scale across offices.



Initiative 01 / Top 20 Agent Growth Plan

Build a focused list of 20 agents across Calabasas, Chatsworth and strategic introductions. Segment by relationship strength, production potential, service needs and next action. The goal is thoughtful one-on-one engagement, not mass outreach.

- Create a one-page Agent Business Profile for each priority relationship.
- Schedule at least 10 individual conversations during the first 30 days (proposed).
- Document next steps, upcoming opportunities and follow-up dates after each meeting.

Initiative 02 / Lauren Concierge Experience

Design an agent-facing service promise together with escrow officers: clear points of contact, communication preferences, proactive milestone updates and prompt escalation when a transaction needs attention.

- Pilot with a small cross-section of agents, not only current high producers.
- Collect feedback after closings and use it to improve team coordination.

Initiative 03 / PCE Agent Resource Center

Audit PCE's existing marketing materials and digital tools before building anything new. Package helpful escrow checklists, timelines, contact information and answers to common questions into one easy-to-share resource.

- Confirm whether an agent portal already exists; avoid duplicate technology.
- Start with a curated resource link or QR code; consider a portal only if needed.

Initiative 04 / Agent Intelligence & CRM

Track conversations, introductions, relevant public professional updates and upcoming follow-ups in one place. A future automated workflow can flag new listings, team changes or relationship milestones and suggest personalized outreach.

03 / BUSINESS DEVELOPMENT STRATEGY

Events that build relationships

A signature PCE Connection Series: useful ideas, real introductions and an enjoyable reason to attend.

Event portfolio

EVENT FORMAT	WHY AGENTS ATTEND	FIRST ACTION
PCE Connect & Collaborate	Cross-office introductions and curated networking	Plan January kickoff
Real Estate Unfiltered	Honest roundtable with respected producers	Recruit 2–3 panelists
AI + Social Media Lab	Practical marketing and follow-up workflows	Identify one credible instructor
Coffee, Connections & Conversations	Informal industry conversation in one office	Pilot in Calabasas
Escrow Academy / Q&A	Understand deadlines, pitfalls and difficult deals	Partner with escrow officer
Luxury Listing Showcase	Property preview and high-quality agent connections	Explore agent-hosted opportunity

Signature pilot / PCE Connect: 2027 Kickoff

A 90-minute event in January designed for approximately 25–30 professionals. Host in or near one primary office, invite a broad mix of relevant industry professionals, and create intentional introductions across offices. Open participation must not depend on past or future referrals.

RUN OF SHOW	EXPERIENCE
00–20 min	Welcome, personal introductions and open networking
20–35 min	Short, useful discussion: what agents are doing differently in 2027
35–65 min	Structured networking with conversation prompts / rotating introductions
65–90 min	Open networking; opt-in access to escrow educational resources



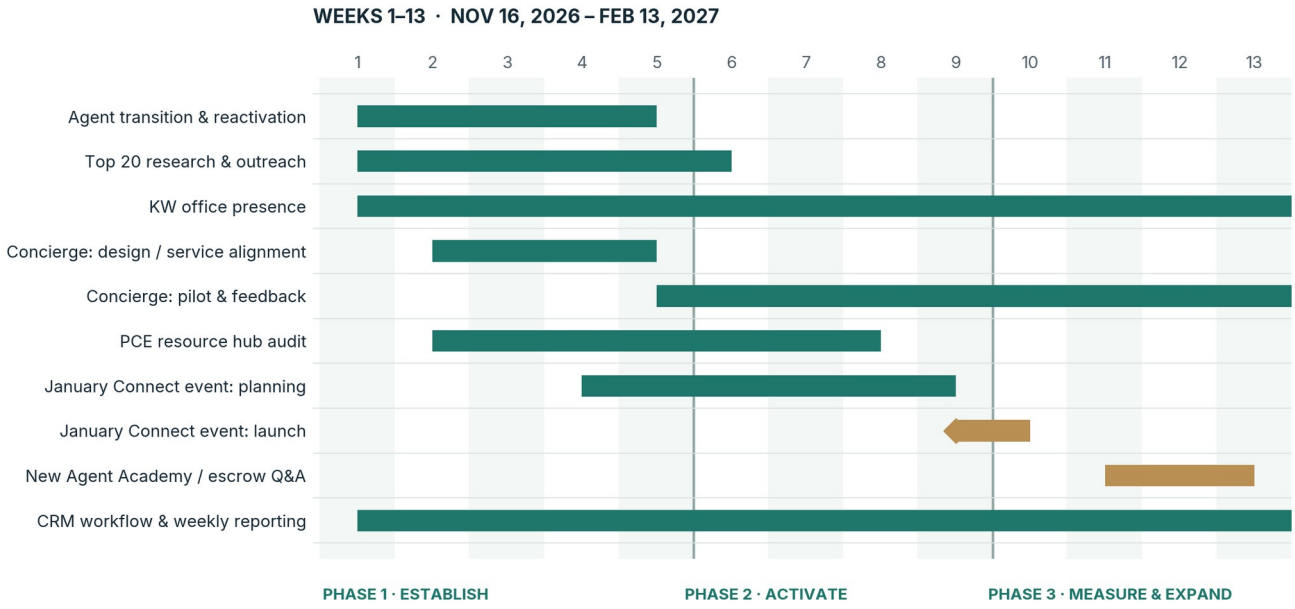
Illustrative pilot budget — for Meny to approve

Planning range: $300–$1,000 for venue, event materials, basic AV/registration and possible speaker costs. Not a vendor quote or spending authorization. Hospitality, gifts, sponsorships and other benefits require compliance review before inclusion.

04 / BUSINESS DEVELOPMENT STRATEGY

90-day implementation timeline

A sequence of near-term commitments with defined launch moments and regular follow-through.



Milestones & decision gates

WHEN	DELIVERABLE	DECISION / OWNER
By end of Week 2	Priority agent list; pipeline definitions; office access	Lauren + Meny: approve targets
By end of Week 4	20 agent profiles; 10 meetings targeted; concierge service outline	Lauren + escrow team: sign off process
Weeks 5–8	Concierge pilot underway; event invitations active; CRM reporting live	Lauren + Meny: approve event plan
Weeks 9–10	January PCE Connect launch and personal attendee follow-ups	Lauren: execute; Meny: support key introductions
By end of Week 13	Performance review and next-quarter expansion recommendation	Lauren + Meny: decide next 90 days

Calendar assumes Monday, November 16, 2026 kickoff. Timing is adjustable around holidays, team capacity and Meny's priorities.

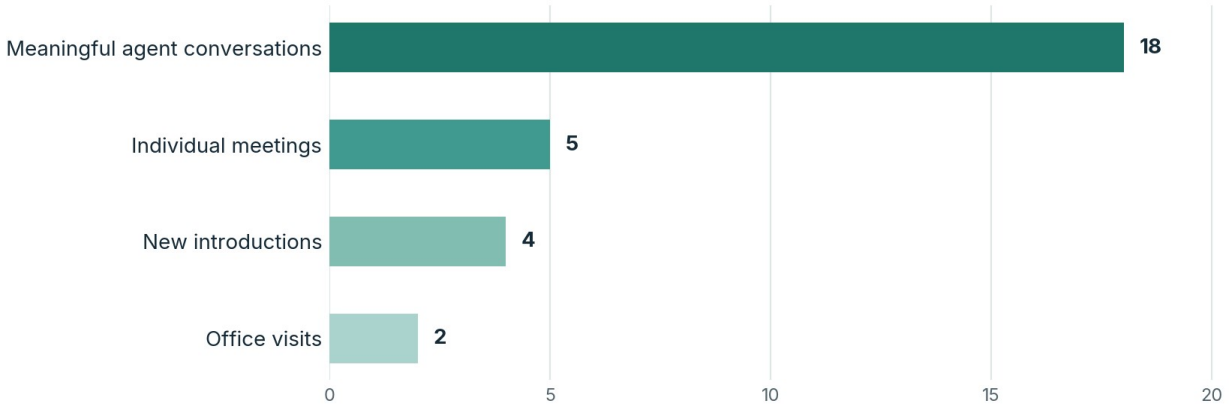
05 / BUSINESS DEVELOPMENT STRATEGY

Accountability & scorecard

Track the activities that create opportunities, then connect them to actual escrow production.

Proposed weekly activity targets

These are planning targets for discussion, not current performance or guaranteed outcomes.



Business outcomes to review monthly

MEASURE	DEFINITION / PURPOSE
New producing agents	First PCE escrow opening from an agent who has not previously opened with PCE
Reactivated agents	Agent resumes opening with PCE after a defined inactive period
Escrows opened	Number of openings attributable to Lauren's relationship work, verified with operations
Repeat engagement	Share of producing agents who open another transaction during review period
Opportunity pipeline	Qualified agent conversations with an identified next step or anticipated opportunity
Service health	Agent feedback, communication issues and successful escalations

Weekly operating cadence

MONDAY

Prioritize follow-ups, listings and meetings for the week.

MIDWEEK

Office presence, agent meetings, education and referrals follow-up.

FRIDAY

Update CRM; review opportunities, openings and issues with Meny.

Production goals will be finalized with Meny once baseline volume, ownership attribution and operational capacity are confirmed.

06 / BUSINESS DEVELOPMENT STRATEGY

What I need to execute

Clear ownership, fast decisions, and active support from office leadership and the escrow team.

Roles & collaboration

RESPONSIBILITY	LAUREN	MENY / PCE SUPPORT
Agent strategy	Own priority list, outreach, meetings and follow-up	Make targeted introductions; share office priorities
Office engagement	Schedule visits, connect with leadership and teams	Facilitate office access and leadership introductions
Concierge pilot	Gather agent needs and feedback; manage relationship	Escrow officers define operational service standards
Events	Concept, invitations, agenda, attendee follow-ups	Approve budget, venue, messaging and compliance
Technology / CRM	Define information and reporting needs	Confirm tools, access, data standards and IT approvals

Five decisions to make together

01 Confirm initial focus offices, priority teams, and the first 20 agent prospects.

02 Agree on a realistic monthly escrow-opening goal after reviewing baseline numbers.

03 Approve the concierge pilot and designate an escrow-officer partner.

04 Select the January networking format and approve a defined event budget.

05 Choose a shared CRM/reporting process and weekly check-in time.

Compliance & brand guardrails

All educational events, invitations, hospitality, promotional items, sponsorships and marketing collaborations must be reviewed with PCE compliance before launch. The plan does not authorize referral-contingent payments, gifts, or other benefits. Agent materials and data use also require company approval and privacy safeguards.

Authoritative references: CFPB RESPA Section 8 FAQs; California DRE/DFPI advisory on escrow referrals. Links appear on the next page.

07 / BUSINESS DEVELOPMENT STRATEGY

Launch toolkit & next steps

Simple templates and a two-week launch checklist make the strategy immediately actionable.

Agent Business Profile — recommended CRM fields

CATEGORY	FIELDS / QUESTIONS
Relationship	Name, office, team, current relationship, preferred contact method
Business fit	Market, focus, growth goals, agent priorities, common transaction challenges
Opportunity	Current escrow experience, upcoming relevant activity, qualified next step
Follow-up	Last contact, next contact date, promised action, assigned owner
Measurement	Meeting date, escrow opening status, service feedback

First two weeks — action checklist

- ☐ Finalize agent transition outreach and categorize contacts as active, warm, or reactivation.
- ☐ Complete the two remaining Meny-introduced agent meetings or set firm dates.
- ☐ Obtain office leadership introductions and identify appropriate office meeting opportunities.
- ☐ Agree on a draft agent-service standard with at least one escrow officer.
- ☐ Confirm what digital resources and CRM tools PCE already has; avoid duplicate builds.
- ☐ Choose the January event concept and assign a planning owner and approval process.

Meeting close: proposed agreement

"My focus is to build meaningful relationships, create opportunities for our escrow team, and track the results. I would like us to agree on the first three initiatives, the support needed to launch them, and what success looks like over the next 90 days."

REGULATORY REFERENCES

CFPB — Real Estate Settlement Procedures Act FAQs (Section 8; gifts and promotional activities):
https://www.consumerfinance.gov/compliance/compliance-resources/mortgage-resources/real-estate-settlement-procedures-act/real-estate-settlement-procedures-act-faqs/

California DRE — Licensee Advisory: real estate commission disbursements and escrow referral concerns:
https://www.dre.ca.gov/Licensees/Advisories/Advisory_2025_06_30_RE_Commission_Disbursements.html