**Mentoring**  

**Coaching and Mentoring**

**Initial Setup:** calls as needed to discuss

* Team Name
* Co-marketing plan with RAs
* Data Base – Where is it? Size? Qualified? Follow up? Add to it?
* Financial
	+ - Budgets – personal and business
		- Business Plan – Net income goals?
		- P&L – Know where you are? Profit Margin?
* Time Management – Prioritize? Time block? Balance? Time for RA’s (set aside blocks)?
* Personal development – conferences, coaches, podcasts, reading
* Website – Teams page, Personal area password

 **Monthly:**  Stepping UP! Innovation Group web meeting (marketing, topics and issues)

**Discussion Items as Desired:**

1 – Team Building

* Team Branding
* Organizational Structure and Setup Overview
* How to be a great Team Lead
* Team Building – Events (lunches, happy hours, outings, conferences), Together!
* Covering for each other (Team to Team), Open Houses, Referrals with other Stepping UP! Teams
* Stepping UP! Team Networking and Referrals Agreement

2 – Team Managing and Tracking

* Tracking and Reporting
* Monthly RA Updates
* Keeping up with volume
* AdminSystems, Transaction Management Software
* Client follow-up, encouraging referrals
* Don’t forget RA clients!

3 – RA/WA Handoffs

* Sherie B video
* Presenting the Team with RA
* Onboarding New RA’s
* New RA Intro Letter

4 – Team Meetings

* Team Meetings – Agendas
* Start and end on time
* Meetings Suck, good book by Cameron Herold

5 – Team Management

* Team Members Time Management – Work hours/days/vacations. Honor time off.
* Performance – don’t tolerate poor performance, dishonesty. Mentor a team of winners!
* Appreciation – gifts, bonuses, contests. Show it!
* The Energy Bus, good book by Jon Gordon

6 – Working Agents

* Setup and recruiting
* Benefits of working with a Team (for Working Agents)
* Team events, training (SOP of the Week, Buffini Blitz videos)

7 – Team Performance

* Goal setting, encouraging & mentoring
* Progress checkups, personal interests and help (family)
* Sales Projections Goals Report
* RA/WA Agreements
* Podcasts for personal growth

8 – Team Growth

* How fast? Limits?
* Assistants/Virtual Assistants?
* Administrative Needs and Support

9 – Recruiting Referral Agents

* Brochure Branding
* Recruiting/Marketing RA’s
* RA Marketing Strategies – Loan Officers, Escrow Officers, Inspectors
* Closing Letters
* Three Letter Series

10 – Outreach to Referral Agents

* Local presentations
* Exit Strategy CE Class
* Newsletters
* Website

11 – Team Planning

* Annual Business Plan
* 12 Week Year
* Vivid Vision

12 – Financials

* Accounting Setup
* Tax Prep
* Business Reports and Profit Margins