

AGENT RECRUITING, DEVELOPMENT AND RETENTION WEEKLY ACTIVITIES CHECKLIST

Using This Checklist and the *Recruiting Weekly Planner*...Sit Down on Sundays and Create Weekly Recruiting, Agent Development and Retention Plans. Allocate At Least Two (2) Hours Per Day...5 Days Per Week For The *Recruiting-Related* Activities You Select.

- Create /'Update' my recruiting 'Target List'
- Meet with my 'Top Producers' to refine/expand 'Target List'
- Research Refined 'Target List' in *MLS* & Google...cull list accordingly
- Have *Administrator* input Refined 'Target List' into Target List Database (phone #s, email etc.)... or do it myself!
- Research local paper, *MLS* and Craig's List etc. to find weekly 'Agent-held' *Open Houses*
- Visit at least 3 *Open Houses*...meet agents....collect business card...evaluate agent
- Research agents in *MLS* & Google...visit their website and website of their company...add to 'Target List' Database... if they measure-up
- Send letters, postcards or emails to 10% of 'Target List' this week
- Phone or personally 'follow-up' recruiting letters, postcards, emails, text sent in last 5-10 business-days
- Practice/refine my *Recruiting and Objection Handling Scripts*
- Set at least two (2) 'Face-to-Face' Recruiting Meetings this week... coordinate with *i-FASTTRAC®* schedule!
- Set at least three (3) 'Face-to-Face' Agent 'Development' and/or Agent 'Retention' Meetings this week
- Remind/encourage my agents to look for 'compatible' potential agents (@ *Open Houses, Coop Transactions*)
- Schedule next month's *Career Seminar*....promote at office meeting...offer 'recruiting bonuses' to my agents
- Create/refine Monthly *Career Seminars Promotional Plan*.... Goal: minimum 5 'attendees' ...one (1) 'recruit'!
- Execute portions of my *Career Seminar Promotional Plan*...such as visiting local *Real Estate Licensing Schools*, distributing *Career Seminar* notices... if possible... speaking with students.
- Familiarize myself with the 10 minute video entitled 'Overview' of '2-In-1' *i-FASTTRAC® Training & Coaching Program* and use it in *Career Seminar* (available at LiveInteractiveTraining.com)
- Talk with my '*Preferred Service Providers*' about my interest in *recruiting* additional agents; ask for their help; extend invitation to them to participate, or sponsor, Monthly *Career Seminars*
- Select 2 Neighborhoods/Buildings where I would like to have an 'agent-representative'.. and send direct mail about next month's *Career Seminar*
- Assemble/refine *Career Seminar Package Contents*...
- Create flyers, ads, phone scripts etc. in support of various *Recruiting Initiatives*...including *Career Seminars*

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WEEKLY ACTIVITIES CHECKLIST

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- Create/refine Agent Career Development Matrix... share with potential recruits and use to counsel my 'Under-producing' and 'Mid-Level' producing agents
- Identify/review the most common Recruiting Objections from Experienced agents ...prepare my verbal and visual responses ...practice/drill/rehearse
- Identify the most common Recruiting Objections from New agents.... prepare my verbal and visual responses... practice/drill/rehearse
- Attend Association/MLS functions to 'meet and greet' potential new 'Recruits' (monthly breakfast, events etc.)
- Conduct/update Broker/Competitor Research (using Google; MLS; competitor's website; reviewing competitor's recruiting materials; agent feedback etc.)
- Input 'Updated' Broker/Competitor data into Broker/Competitor Database for future reference
- Identify/Create 'Uniques' about my company from perspective of: New Agents, Mid-level Producers, Top Producers... get my agents' input...especially Top Producers
- Develop written FBBT for each 'Unique' identified/created. Practice/drill/rehears!
- Create/'Update' Recruiting Competitive Flow Chart based upon Broker/Competitor Research and 'Uniques' about my company. Emphasize company's 'Points-of-Difference/'Uniques' at top!
- Meet with one of my Least Productive Agents 'one-on-one' ... refine their Career Development Path using the Agent Career Development Matrix... take the 'option' out of 'Core' training...give 'deadlines' ... if they resist... 'reduce' commission splits until 'Core' Training completed...or 'terminate' agent
- Meet with one of my Mid-Level Producers one-on-one...recommend 'Elective' Training... recommend 'How to' videos...remind them videos are available 24/7 from location of choice...ask about potential Recruits!
- Meet with Top Producers one-on-one... praise performance/recognize production... offer assistance... encourage suggestions...remind about 'How to' videos...especially those videos dealing with 'Internet Marketing Strategy'...ask about potential Recruits!
- Practice, Drill, Rehearse Recruiting Interview Sequence. 'How and When to: give 'Overview' of the Interview'; 'How and When' to introduce and use Recruiting Questionnaire; 'How and When' to introduce 'Uniques' about company and Recruiting Competitive Flowchart

RECRUITING WEEKLY PLANNER TEMPLATE

MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY	SUNDAY
(7:30 - 8:00) Affirms/ Review Sked	(7:30 - 8:00) Affirms/ Review Sked	(7:30 - 8:00) Affirms/ Review Sked	(7:30 - 8:00) Affirms/ Review Sked	(7:30 - 8:00) Affirms/ Review Sked	(7:30 - 8:00) Affirmations	(7:30 - 8:00) Affirms/ Review Sked
(8:15 - 9:00) Open House Research	(8:15 - 10:00) Schedule/Plan Career Seminar For Next Month	(8:15 - 9:00) Refine 'Target' List 9:00 - 10:00 Office Meeting Mention Next Month'	(8:15 - 9:30) I.D/Create 3 'Uniques' & FBBT About Company	(8:15 - 9:30) Update Company's Competitive Flowchart Add New 'Uniques'	Appointment With	Appointment With
(9:00 -10:00) CALL 3	(11:00 - 12:00) Meet 'One-On-One' With 2 Of My Experienced' Agent Counsel / Guide	9:00 - 10:00 Office Meeting Mention Next Month'	(11:00 - 12:00) Meet 'One-On-One' With 1 Of My 'Top Producers' Recognize/Compliment Discuss 'Target' List	Competitive Flowchart Add New 'Uniques'	With	With
'Target List' Agent	(11:00 - 12:00) Meet 'One-On-One' With 2 Of My Experienced' Agent Counsel / Guide	Mention Next Month'	(11:00 - 12:00) Meet 'One-On-One' With 1 Of My 'Top Producers' Recognize/Compliment Discuss 'Target' List	Update Company's Competitive Flowchart Add New 'Uniques'	With	With
(11:00 - 12:00) Meet 'One-On-One' With 2 Of My 'New' Agents Counsel / Guide	(11:00 - 12:00) Meet 'One-On-One' With 2 Of My Experienced' Agent Counsel / Guide	Career Seminar Offer Recruiting Incentive	Meet 'One-On-One' With 1 Of My 'Top Producers' Recognize/Compliment Discuss 'Target' List	(11:00 - 12:00) Meet 'One-On-One' With 2 Of My 'New' Agents Counsel / Guide	Insert	Insert
(12:00-1:00) Lunch	(12:00-1:00) Lunch	(12:00-1:00) Lunch	(12:00-1:00) Lunch	(12:00 - 1:30) Lunch With An Agent On 'Target' List	(12:00-1:00) Lunch	(12:00-1:00) Lunch
(1:30 - 2:30) Conduct/Update Broker/Competitor Research	(1:30 - 2:30) CALL 3 Agents On 'Target' List	(1:30 - 2:30) Mail 10 Agents On 'Target' List	(1:30 - 2:30) Send 100 Notices To 'Targeted' 'Neighborhood About Next Month's Career Seminar	(12:00 - 1:30) Lunch With An Agent On 'Target' List	(4:00 - 5:00) Practice & Rehearse Recruiting Interview Sequence/Questions	(1:00 - 4:00) Visit 5+ Agent -Held Open Houses Evaluate Agents
(5:30 - 6:00) Plan For Next Day	(5:30 - 6:00) Plan For Next Day	(5:30 - 6:00) Plan For Next Day	(5:30 - 6:00) Plan For Next Day	(5:30 - 6:00) Plan For Next Day	(5:30 - 6:00) Plan For Next Day	(5:30 - 6:00) Weekly Planning
FAMILY TIME	FAMILY TIME	FAMILY TIME	FAMILY TIME	FAMILY TIME	FAMILY TIME	FAMILY TIME
PRACTICE SCRIPTS	PRACTICE SCRIPTS	PRACTICE SCRIPTS	PRACTICE SCRIPTS	PRACTICE SCRIPTS	PRACTICE SCRIPTS	PRACTICE SCRIPTS
LEGEND:						
MONEY \$\$\$ TIME		SUPPORT TIME		R.E. RELATED TIME		
				NON-R.E. TIME		

RECRUITING WEEKLY ACTIVITY REPORT

Broker/Mgr. _____ Week Starting **Monday:** _____
 Office: _____ Week Ending **Sunday:** _____

<i>Recruiting, Development Retention Activities</i>	Weekly Goal	Mon	Tues	Wed	Thur	Fri	Sat	Sun	Weekly Actual
'Target List'	30								
# Agents Added To List	5	1		3					4
# Emailed/Mailed/Text	10	10							10
# Contacted By Phone	10		3		4				7
# Contacted In-Person	5			3		3			6
Career Seminar	120								
# Emailed/Mailed/Text	100	50			50				100
# Contacted By Phone	10		5		5				10
# Contacted In-Person	10			5		3			8
'Target' Neighborhoods	100								
# Neighbors Emailed/Mailed/Text	100		100						100
# Followed-up By Phone									0
# Contacted In-Person									0
License Candidates	10								
# Candidates Emailed/Mailed/Text									0
# Followed-up By Phone	10			10					10
# Followed-up In-Person									0
License Schools	50								
# Attendees Approached									0
# Windshield Flyers Placed	50					50			50
# Donut/Lunch Flyers Distrib.									0
My Under-Producing Agents	5								
# Emailed/Mailed/Text									0
# Contacted By Phone									0
# Met Face-to-Face	5	1	1	1	1	1			5
# Adjusted Career Developm	2			2					2
My Mid-Level Producers	3								
# Emailed/Mailed/Text									0
# Contacted By Phone									0
# Met Face-to-Face	3			1	1	1			3
# Adjusted Career Developm									0
My Top Producers	2								
# Emailed/Mailed/Text									0
# Contacted By Phone									0
# Met Face-to-Face	2	1	1						2
Production/Results	Wkly Goal	Mon	Tues	Wed	Thur	Fri	Sat	Sun	Wkly Actual
Recruiting Leads	5								
# 'Unlicensed' Leads	1				1				1
# 'New' Agent Leads	3			1			1		2
# 'Experienced' Agent Leads	1								0
Hires	3								
# 'Unlicensed' Hires	1		1						1
# 'New' Agent Hires	1						1		1
# 'Experienced' Agent Hires	1								0
Terminations	0								0
Cell #:	Email:								

Career Development Training Matrix

AGENT NAME: _____ REALTY _____
 DATE: _____ AGENT SIGNATURE: _____

'Elective' Skill Development		<u>Agreed</u>	<u>Projected</u>	<u>Actual</u>
i-FASTTRAC®		Start	Completion	Completion
		Date	Date	Date
Session #	('Expected' New/Underproducing Agentsl. 'Optional' Others)			
1	Understanding The Real Estate Business and Goal Setting			
2	Effective Time Management for Real Estate Success			
3	Prioritized/Proactive Prospecting: Part 1			
4	Prioritized/Proactive Prospecting: Part 2			
5	Prioritized/Proactive Prospecting: Part 3			
6	Buyer Counseling Process			
7	Presentation Power: Phase 1 & 2 Marketing (Listing) Presentation			
8	Presentation Power: Phase 3 & 4 Marketing (Listing) Presentation			
9	Power Pricing: 'How To' Control The Pricing Strategy			
10	Objection Handling Power			
11	Closing Power			
12	Presenting The Offer And Negotiation Power			
'Elective' In-House Training				
Session #	('Optional'/'Recommended' To <u>All</u> Agents)			
1	Office Orientation and Policy & Procedure Manual			
2	Company Listing Contract, Listing Forms, Seller Agency			
3	Company Sales Contract, Sales Forms, Buyer Agency and Exclusive Buyer Representation Agreement			
4	Company's Website, Software and Office Equipment			
5	Company's Lead Generation System			
6	'How to' Process Listings and Sales			
7	Company's Strategic Marketing Plan			
8	Company's Preferred Service Providers			
9	'How to' Interpret/Explain Closing Statement			
10	Company's Programs/Products/Services/Tools			
11				
12				
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