

COACHING

ACTION PLAN



Presented by: Prospect Boomerang

Getting Started

Anyone that has launched a new program in their organization can tell you, there simply is no guarantee of success when it comes to getting your team from first hearing about a new initiative to a complete & effective implementation! As someone who has been part of launching training programs, corporate rebranding, software, marketing initiatives, new products, new services, or even new departments there simply is no fail proof plan. However, there are things that you can do as a leader in your organization, some tips that can ensure you move in the right direction. Tips, that if followed as closely as possible will put you on a path that is the most likely to succeed at a high level while minimizing the opportunity for failure. In an effort to ensure that these tips are implemented as closely as possible we offer two months' worth of guidance on launching this program. This coaching component's suggested outline of sessions is laid out as follows:

1. Complete Organizational Support:

For a new endeavors to be successful, the support and guidance must begin at the top. We schedule 8 meetings with your senior leadership team that are 1.5 hour meetings once a week on a schedule that is set directly after you purchase the course. Support from senior leadership, your appointed marketing personnel, your recruiting personnel, and your Welcome Specialist are a must. These weekly meetings will follow the chart shown below.

2. Clear and Concise Goal:

The end result for your organization must be clearly written and you must review it regularly with the delivery team. They must follow the KEAP method:

- a. Knowledge – their intelligence must be strong enough to perform their responsibilities
- b. Education – They must thoroughly understand their role and have the tools execute that role.
- c. Attitude – They must have a winning attitude towards the program and your company’s success in general!
- d. Plan – They must be able and allowed to perform their respective duties related to the plan. It should take no more than 3 hours weekly and 15 Hours the week of the event. They will participate in portions of the weekly meetings.

3. Work the Plan:

This is a detailed plan supported by a thorough and proven system of delivery. There is clearly a way to implement pieces and parts of this that would work as a stand-alone product.

However, it is best if this is delivered as close to how it is laid out as possible. That is why your coaching sessions will not only include someone assigned specifically to your account from our team but as needed a team member that specializes in the proper deployment of that week’s objectives to ensure you get the most out of your weekly session. As obstacles arise—and they will- resources can be properly allocated to keep the project on track.

4. This is a marathon not a sprint:

Recruiting should be an integral and ongoing project within your brokerage. This is a plan to lay a foundation for long term consistent success by implementing practices in your brokerage. Sound practices that once systemized will allow you to continue the forward progress in a time effective way to not just recruiting new agents, effectively train them, advertise your brand, but to also retain an agent population that's worth having. This plan should be part of your strategic goal not a wish that you work on when you have time or when revenue/market share is down. These fundamentals are a long term solution.

5. Relationships are the Key:

As a leader you must identify and leverage the talent from the people on your team. This is your chance to allot time and resources to the people that matter, your staff. If they are not the ones that matter...is it time for new staff? If you put the right people in these roles they will drive enough bottom line revenue to pay for themselves 5 times over. That is easier said than done but is critical to your long term survival.

Week	Action	Resource(s)	Asset
1	Introduction, target agents, and First Steps	Redwood ASM	Playbook/Videos/coach
2	Review, get calling started	Redwood ASM/Calls	Playbook/Videos/coach
3	Review, Begin Podcast, and Event planning	Redwood ASM/Event	Playbook/Videos/coach
4	Review, Ads start	Redwood ASM/Ads	Playbook/Videos/coach
5	Review, Implement Event funnel	Redwood ASM/Funnels	Playbook/Videos/coach
6	Review, Begin Drips and follow up	Redwood ASM/Drips	Playbook/Videos/coach
7	Review, implement appointment process	Redwood ASM/ Appts	Playbook/Videos/coach
8	Review, Deep dive on outstanding event items	Redwood ASM/Events	Playbook/Videos/coach

Each week we will review the prior week's successes and challenges.

This is an opportunity to review with the Redwood staff what is working and what you need help deploying so you can make the most of the program. Each week all parties should plan on no more than 1.5 hours for the call. The appropriate staff will be on the phone as needed to ensure that any questions that need to be answered can be addressed by the appropriate parties.

Summary

If you prioritize these actions they will
FORCE you to succeed.

The resources in this guide will put
your brand in front of agents that you
do want &

agents that you don't want.....the
choice will be yours.

It will allow you to tell your story in
the market place instead of being
relegated to the history written by past
agents and jealous competitors. This is
your chance to write you history.

Work the plan.