**30/60/90 DAY PLAN**

Executive Assistant – Monica Reynolds Real Estate

When developing your new team member's 30-60-90-Day plan, focus on what the goal is, and how you will measure the team members achievements. Identi6/ targets for the team member that will facilitate success in the role, and on your team. Feel free to consult the job description and KW Connect tools for ideas.

Focus on **SMART** Goals:

 **S**pecific: Clearly define what you are going to do.

 **M**easurable: Establish concrete criteria for measuring progress toward the attainment of each goal you set.

 **A**chievable: Goals should be challenging but a match to the knowledge and skills of the employee.

 **R**epeatable: The action or goal can be completed on a repeated basis.

 **T**imely: A commitment to a deadline helps a team focus their efforts on urgent tasks first.

30 DAY GOALS

 Answer the phone professionally, use the phone equipment, transfer/forward calls, pull voicemail

 o Leam and effectively communicate the Potential Buyer script— obtain script certification

 o Leam and effectively communicate the Potential Seller Script— obtain script certification

 o Effectively recite scripts, role play, managing voicemail, closing the call — obtain script certification

 o Upset client/ or I want to speak to the agent only— obtain script certification

  Own the database and help GROW the database (minimum of 3 entries per day)

 o Data entry

 o Track database growth

 o Managing all entries that are complete...name, address, phones and emails

 o Manage Email Campaigns

 o Manage Mail Campaigns

 o Email Marketing videos

 o Know how to clean up database

  Know and effectively communicate the listing process from A to Z

 o Pre-List Package

 o MLS entry

 o Customer conversations daily

 o Seller feedback using the script

 o Marketing/ website

 o Maintain listing checklist and file

 o Ask for reviews on a weekly basis

 o Ask for referrals upon closing

 o Maintain conversation log

 o Maintain listing update for agent

 o Property brochures

 o Open houses

 o Facebook

 o Inventory

60 DAY GOALS

 Closing Files

 o Build closing file checklist

 o Proficient on maintain pending files

 o Closing File

 o Calling the seller with updates

 o Schedule all inspections o Manage repairs

 o Negotiate if licensed

 o Monitor contingency dates

 o Ask for reviews/ referrals on a weekly basis

  Tracking Numbers and Sources of Business weekly

 o Appointments set

 o Listings taken

 o Listings under contract

 o Buyers under contract

 o Price reductions

 o Closed

 o Create and maintain an excel spreadsheet for sources

 Lead Generation Systems

 o Support one (for example: expireds, research, letters etc.)

90 DAY GOALS

  All marketing

  All listings

  All pendings

  Database

  Phone and scripts

  Tracking Numbers weekly

  Goal monitoring 15th Protocol of the Month

  Helps with 1 or 2 Lead Generation systems

|  |  |
| --- | --- |
| Team Member Name: |  |
| Leader Name: |  |
| 30 Day Goals Completed: |  |
| 60 Day Goals Completed: |  |
| 90 Day Goals Completed: |  |