

ACTION CHECKLIST

LEADERSHIP MINDSET & FOUNDATION

- Reflect on your leadership modeling: Are you consistently demonstrating the standards you expect from agents?
- Release unrealistic expectations: Recognize that agents are not wired like top producers—build structured development plans instead.
- Adopt generous assumptions: Assume agents want to succeed and approach gaps with curiosity over judgment.
- Avoid “Why don’t they just…” thinking—lead with empathy and patience.

REINFORCE STANDARDS WITH STRUCTURE

- Define simple, repeatable performance standards (e.g., 20 convos/week, 1 appointment set/week)
- Reinforce those standards in weekly 1:1s, huddles, and meetings
- Use metrics to track conversations, appointments, database entries, and follow-up consistency
- Set expectations as mutual agreements—not rigid rules—to foster autonomy and commitment

BUILD A CULTURE OF ACCOUNTABILITY AND SUPPORT

- Schedule daily or weekly activity reviews (calls made, convos held, appointments set)
- Offer flexible logging (some agents prefer morning, others evening)
- Use supportive accountability: ask “How can I help?” instead of “Why didn’t you…?”
- Stay engaged—check in via text, ask thoughtful questions, and show care

DESIGN POWERFUL MEETINGS

- Begin team huddles with:
 - Wins, Gratitudes & Affirmations
- Add daily/weekly reading (e.g., from Exactly What to Say for Real Estate Agents)
- Keep meetings short, structured, and consistent in format
- Avoid overrun and protect your team’s time

PRIORITIZE TRAINING THAT STICKS

- Introduce daily skill-building: role plays, objection handling, question challenges
- Use short, focused 1-on-1 role plays (under 15 minutes)
- Implement “script infernos” and “question battles” for engaging practice
- Celebrate participation—not just results—to encourage ongoing effort

FOCUS ON AGENT SKILL DEVELOPMENT

- Emphasize mastering questions, not scripts
- Use “3 Questions Challenge” and “Discount Exercise” to build resilience
- Track conversion metrics: Dial-to-contact ratio & Contact-to-appointment ratio
- Inspect database activity at least 1 hour/week: focus on meaningful convos and follow-up

COACHING FRAMEWORK FOR CONSULTATIONS

- Teach consultations using a structured, step-by-step method
- Have agents repeat steps until internalized
- Provide feedback using: What went well, What to work on, & Response: “Thank you” only (no justifications)
- Encourage agents to “test out” by demonstrating competency, not perfection

BUILD COMMUNITY AND ENGAGEMENT

Organize or attend client/community events as a team

- Empower peer leaders to support others (e.g., top producers, pod leaders)
 - Foster small groups (e.g., book clubs, group workouts) for bonding
 - Stay connected—text, check in, and recognize life outside of work
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