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On The Document (Forms) CD

Here is a list of the forms in this section. They are also on your Document (forms) CD. On your forms CD, the documents are either in Word, Excel, or they are PDFs.

1. *Goals/Actuals Spreadsheets* (forms A and B--hard copy is in your resource here in section 6 and Excel spreadsheets are on your document CD). For your convenience, these spreadsheets extend 3 months. We have already put in the suggested goals in business development and results of business development, which match the goals in Up and Running. (You can change them, if you need to). The spreadsheets have a 'summary' feature so you can summarize the business-developing achievements of the agent, and compare them with your standards at any time.

Note: The forms above are supplied both on the agent's document CD and on your document CD.

2. *Manager's End of Month Analysis* (hard copy is in your section 6 here; a Fill-In Word document is on your document CD). This analysis allows you to compare the agent's results with your standards, to determine your next steps.
3. *Up and Running Production Summary* (hard copy is in your section 6 here; a Fill-In Word document is on your document CD). If you also want to track the agent's production in dollars, this form allows you to do that.
4. *Coach's Notes* (hard copy here in section 6 and PDF on your document CD). This document is to help you keep notes during your coaching meetings about your agent's progress.
5. *Evaluative Questionnaire to Agent* (hard copy here in section 6 and PDF on your document CD). This form allows you to ask revealing

questions to the agent as you evaluate whether you want to keep coaching the agent.

6. *Coach's Questionnaire to Evaluate your Chances of Success in Coaching* (hard copy here in section 6 and PDF on your document CD). This form allows you to reflect on the coach ability of the agent, and to decide next steps.
7. *Mutual Expectation* (hard copy is in your section 6 here; a Fill-In Word document is on your document CD). This example allows you to address mutual expectations during the interview, using your standards, and get agreement, so you know you have a good candidate who will go to work.
8. *Peer Coaching Contract* (hard copy is in your section 6 here; a Fill-In Word document is on your document CD). This example gives you a sample agreement that you can use if you have peer coaches or mentors in your office.

Note: Your agent has several coaching forms, too, for his use, on his document CD, which is part of the Up and Running package.

Managers and Coaches

Putting Up and Running To Work

How to Put this Resource Right to Work

This resource is to be used with the 3rd edition of Up and Running in 30 Days, book and 4-CD set. Your agent will need to have the latest edition of the book, along with the 4 CDs for that edition. (We do not sell the books alone, since some of the training and important documents are on the CDs for your agent to use to make money faster).

In the Agent's CD Set

The agent's CD set comes with 3 audio CDs and 1 "document CD". On the audio CDs, I help and support you with the "inside story" of a successful new agent career start (I share tips and guidelines not in the book). I reinforce the principles in Up and Running—the principles new agents try to ignore! I save you time, so you do not have to do so much teaching, and can focus on the accountability with the agent.

Actual Role Plays of the Sales Calls and Sales Skills

On one audio CD, we do actual role plays of the lead generating scripts and sales scripts in the book. This is a training support for you.

The Agent's Document CD Contains the Important Planning and Accountability Forms

On the agent's "document CD" are 23 important planning and accountability forms you will use to hold the agent accountable, including:

1. The Excel spreadsheets (which I've labeled A and B here) with the Up and Running standards already filled in. You also have these on your document CD. The agent will email or provide these to you weekly, so you can hold the agent accountable to his goals and your standards
2. Real estate budget/operating expenses, so the agent has a clear idea of his investment and his need for income
3. Yearly goals and monthly activities goal setting document, so you and the agent know what the agent intends to accomplish (the big picture)

4. The agent's weekly time-blocked plan, ready to fill on computer, so you can hold the agent accountable to his plan
5. Your Marketing Planner worksheet, so you can hold the agent accountable to his marketing plan
6. The Technology Planner
7. 9 sales scripts and letters, ready for customization

Get Started Now

Section four, The Accountability chapter, gives you the simple steps to start using Up and Running as a coaching tool with your agent. The 3rd edition of Up and Running is very directive to the agent. It tells agents when to read certain chapters, and provides a timeline for them to get started. I will integrate this timeline with your coaching in the Accountability chapter here.

Quick Coaching Prompter

So you can put this resource right to use, we have added a laminated Quick Coaching Prompter, which includes the best coaching questions to ask, most important coaching pointers, and how to hold a coaching session. Simply keep this laminated sheet on your desk as a 'prompt' each time you hold a coaching conference.

Your Accountability Forms on CD

So you can manage your agent's process, you also have "fill in" forms on your CD to manage your agent's progress. They include an Up and Running Production Summary and your Monthly Summary Analysis.

You will see hard copies of those forms in section 6 of this resource.