

# 30-60-90 PLAN

## Listing Specialist

- ✓ **Specific:** Clearly define what you are going to do
- ✓ **Measurable:** Establish concrete criteria for measuring progress toward the attainment of each goal you set.
- ✓ **Achievable:** Goals should be challenging but a match to the knowledge and skills of the employee
- ✓ **Repeatable:** The action or goal can be completed on a repeated basis.
- ✓ **Timely:** A commitment to a deadline helps a team focus their efforts on urgent tasks first.

### 30-Day Goals

- ☐ Participate in JOREG [daily agent scripting](#) at 8:30 am, followed by agent meetings at 8:45 am, and *weekly* JORG team meeting at 8:30 am every Wednesday.
- ☐ Attend *daily* accountability check-ins with the team lead to report productivity metrics, struggles and successes.
  - Lead generate a minimum 1 hour per weekday and a minimum 1 hour of lead follow-up per weekday, and demonstrates participation in lead generation by entering daily lead gen activities into the [Daily Reporting Form](#).
  - Make a minimum of 100 *contacts* per week
- ☐ Turn in [Sphere of Influence](#) list with 100 names, phone numbers, emails, & addresses to the Director of Systems (Excel Spreadsheet Emailed).
- ☐ Identify your top 10 connectors (people who are likely to be a great referral source) on your list.
- ☐ [Call, message, or send a handwritten note](#) to everyone on the provided Sphere of Influence list.
- ☐ Shadow two (2) Listing Consultation Appointments conducted by the JOREG lead listing specialist.
- ☐ Schedule and maintain two (2) client appointments.
- ☐ Hold a minimum of three (3) open houses per month. First Open House to be shadowing a team agent, with remaining two open houses to be hosted independently.
- ☐ Attend Contracts & Forms class conducted by Market Center managing broker.
- ☐ Attend Wednesday's weekly KW Market Center team meeting.
- ☐ Attend scripts with Zak on Mondays from 11-12pm
- ☐ Review KW training calendar & attend appropriate classes - review with team/Broker
- ☐ Keep all business appointments on Google Calendar, shared to the team.
- ☐ [Complete EE-Mastering the CMA Course - 6 CE hours - The Pricing Strategy Advisor \(PSA\) certification course](#)
- ☐ Attend Tonya Backus' BPO/CMA class
- ☐ Confirm with Team Leader or ALC member dates for upcoming BOLD/Ignite/4Cs/Module 3 class
- ☐ New Hire Checklist Fully Completed

What is the most important thing you learned so far?

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What changes have taken place so far in terms of your knowledge? What do you believe you still need to know (to learn about) to succeed in this job?

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How are you feeling in terms of your attitude? What do you find you really enjoy doing/learning? What things gave you the most energy and made you feel the most fulfilled this week? What kind of attitudes and beliefs do you believe are necessary for success in this job?

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How are you feeling in terms of your skills? What do you believe you still need to develop to succeed in this job?

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What are you learning are the **habits** of someone who is a really high performer in this role?

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# 60-Day Goals

- ☐ Follow a time-blocked calendar (participate in JOREG \*[daily agent scripting](#) at 8:30 am, followed by \**daily* agent meetings at 8:45 am, and \**weekly* JOREG team meeting at 8:30 am every Wednesday, lead generate & lead follow up every weekday, demonstrate participation of lead generation by entering weekly lead gen activities into the [Agent Reporting Form](#) by Tuesday evening.
- ☐ Attend *daily* accountability check-ins with the team lead to report productivity metrics, struggles and successes.
  - Lead generate a minimum 1 hour per weekday and a minimum 1 hour of lead follow-up per weekday, and demonstrates participation in lead generation by entering daily lead gen activities into the [Daily Reporting Form](#).
  - Make a minimum of 75 *contacts* per week.
- ☐ Schedule and maintain three (3) client appointments
- ☐ Procure one (1) Signed Listing Agreement and process UTILIZING [Listing Processes](#) AND [Listing Manager Processes](#), AND Paperless Pipeline transaction coordination system. UPON ACCEPTANCE complete [Transaction to Close Process](#) AND Paperless Pipeline transaction coordination system.
- ☐ Hold a minimum of 3 (three) open houses per month
- ☐ Attend Contracts & Forms and Dotloop training conducted by Market Center
- ☐ Attend Wednesday's weekly KW Market Center team meeting.
- ☐ Review KW training calendar & attend appropriate classes - review with team/Broker
- ☐ Attend scripts with Zak on Mondays from 11-12pm
- ☐ Read Millionaire Real Estate Agent or SHIFT

What is the most important thing you learned so far?

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What changes have taken place so far in terms of your knowledge? What do you believe you still need to know (to learn about) to succeed in this job?

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How are you feeling in terms of your attitude? What do you find you really enjoy doing/learning? What things gave you the most energy and made you feel the most fulfilled this week? What kind of attitudes and beliefs do you believe are necessary for success in this job?

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How are you feeling in terms of your skills? What do you believe you still need to develop to succeed in this job?

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What are you learning are the **habits** of someone who is a really high performer in this role?

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# 90-Day Goals

- ☐ Follow a time-blocked calendar (participate in JOREG \*[daily agent scripting](#) at 8:30 am, followed by \**daily* agent meetings at 8:45 am, and \**weekly* JOREG team meeting at 8:30 am every Wednesday, lead generate & lead follow up every weekday, demonstrate participation of lead generation by entering weekly lead gen activities into the [Agent Reporting Form](#) by Tuesday evening.
- ☐ Schedule and maintain three (3) listing appointments
- ☐ Hold a minimum of 3 (three) open houses per month
- ☐ Procure two (2) Signed Listing Agreements and process UTILIZING [Listing Processes](#) AND [Listing Manager Processes](#), AND Paperless Pipeline transaction coordination system. UPON ACCEPTANCE complete [Transaction to Close Process](#) AND Paperless Pipeline transaction coordination system.
- ☐ Attend 2 Market Center trainings
- ☐ Make a minimum of 50 contacts per week.
- ☐ Read Millionaire Real Estate Agent or SHIFT
- ☐ Select a community board or organization and join (Chamber of Commerce, Rotary City Council, etc)

What is the most important thing you learned so far?

What changes have taken place so far in terms of your knowledge? What do you believe you still need to know (to learn about) to succeed in this job?

How are you feeling in terms of your attitude? What do you find you really enjoy doing/learning? What things gave you the most energy and made you feel the most fulfilled this week? What kind of attitudes and beliefs do you believe are necessary for success in this job?

How are you feeling in terms of your skills? What do you believe you still need to develop to succeed in this job?

What are you learning are the **habits** of someone who is a really high performer in this role?

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

