New Teammate Expectations

This document outlines the daily, weekly, and ongoing activities that all new teammates should complete to stay productive, effective, and aligned with our brokerage's standards.

To make it easy and simple, every day, you should focus on opening conversations with the **RIGHT** people that allow you to give them your business card. Aim to give two business cards away every day to the **RIGHT** people.

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1. Meeting Attendance

1. Wednesday Meetings
   - Attend all Wednesday team meetings (General Team Meetings, Zillow Flex, Sales Meetings, etc.).
   - Treat these meetings as mandatory—your presence and participation are critical for staying informed and connected.
2. Planned Team Trainings
   - Make every effort to attend any scheduled team training sessions.
   - Engage fully by asking questions and sharing insights during these training events.

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2. Daily Prospecting & Lead Generation

1. Daily Prospecting Calls
   - Set aside a consistent time block (e.g., 9:00 AM – 11:00 AM) to make calls to potential leads, past clients, or your sphere of influence.
   - Aim for a minimum number of calls or contacts per day (e.g., 10–20 quality conversations).
2. Follow-Up
   - Use a CRM or tracking spreadsheet to follow up on leads, respond to inquiries, and schedule appointments.
   - Prompt follow-up is critical—leads are more likely to convert when contacted quickly.

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3. CRM Usage & Database Management

1. Update CRM Daily
   - Enter new contacts, notes, and tasks every day.
   - Set reminders to follow up with specific leads on scheduled dates.
2. Organize Your Pipeline
   - Categorize leads (e.g., hot, warm, cold) to prioritize who you should be contacting first.
   - Track the progress of each lead's journey from introduction to close.

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4. Marketing & Social Media

1. Social Media Presence
   - Post regularly about your listings, open houses, market insights, and community events.
   - Engage with followers by replying to comments and messages promptly.
2. Personal Branding
   - Use consistent branding across all platforms (e.g., email signature, business cards, social media).
   - Share testimonials and success stories to build credibility.

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5. Open Houses, Broker's Tours & Community Involvement

1. Weekly Open Houses
   - Host or co-host open houses whenever possible to meet potential buyers and sellers.
   - Collect visitor information and follow up within 24 hours.
2. Weekly Broker's Tours
   - Attend local broker's tours to preview new listings, stay on top of market trends, and network with fellow agents.
   - Share insights from these tours with potential clients or on social media to demonstrate your market expertise.
3. Community & Networking Events

- Attend local events or volunteer opportunities to stay visible and engage with your community.
- Seek out industry-related networking events (e.g., Chamber of Commerce mixers, real estate meetups) to build relationships with other professionals and potential clients.

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6. Collaboration & Teamwork

1. Share Best Practices
   - Exchange ideas, scripts, and experiences with fellow agents during meetings or on internal communication channels.
   - Offer support to teammates by covering open houses, sharing resources, etc.
2. Accountability Partners
   - Pair up with another agent to stay accountable on daily prospecting and goals.
   - Check in weekly to review successes, challenges, and upcoming objectives.

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7. Professional Development

1. Continuing Education
   - Keep up with any required CE (Continuing Education) courses for license renewal.
   - Look for industry webinars or local workshops to further sharpen your skills.
2. Knowledge of Market Conditions
   - Stay updated on local market trends, inventory levels, and pricing.
   - Share these insights with clients and on social media to position yourself as a knowledgeable resource.

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8. Communication & Responsiveness

1. Timely Responses
    - Respond to client inquiries, text messages, and emails within a few hours whenever possible.
    - Update clients regularly on the status of transactions or new listings.
2. Internal Communication
    - Keep lines of communication open with the broker, team leaders, and staff.
    - Immediately address any challenges or questions that arise.

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9. Time Management

1. Daily Schedule & Time Blocking
    - Plan your day with specific time blocks for prospecting, follow-ups, administrative tasks, and personal development.
    - Avoid distractions during your blocked time to maximize productivity.
2. Set Weekly Goals
    - Identify weekly targets for calls, appointments, client meetings, and open houses.
    - Review your progress at the end of each week and adjust your plan as needed.

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10. Monthly & Quarterly Reviews

1. Performance Check-Ins
    - Schedule regular one-on-one meetings with a team leader or mentor.
    - Assess your performance metrics (listings taken, transactions closed, lead conversion rates).
2. Goal Setting
    - Revisit and adjust your personal and professional goals quarterly.
    - Develop action plans for areas that need improvement.