



MOMENTUM CHECKLIST - VALUE

1. VALUE

- What is the positioning statement for your office?
- Why will an agent join your office?
- What unique component of value does your office possess? Complete the sentence: If you're serious about _____; we're serious about you!
- I offer a complete agent development program!
- I have a specific component of value for each classification of agent I hope to attract:
 - Newly licensed agents
 - Low – medium producing agents
 - High producing agents
 - Teams
- I have a list of behavioral traits for agents I would like to attract.
- I have taken the necessary steps to offer the environment (culture) my ideal agent wants

2. CONSULTING

- The agent training course manuals on business planning (consulting) have been reviewed
 - Real Estate Perspective
 - Activities Management
 - Sales Consultant Business Plan
 - The Leverage Summit (for teams)
- I have established a business mantra and transaction benchmark with at least one agent
- I have reviewed one agent's business plan based on the agent development model:
 - Financial Model
 - Define specific aspirations
 - Create a prioritized plan for the money
 - Establish Business Mantra
 - Calculate transaction benchmark
 - Operational Model – determine strategies and tactics for achievement
 - Organizational Model – necessary functions/positions; time budget
 - Vital activities checklist – confirm responsibilities
 - Key performance standards – behavioral requirements
 - Identified relevant training classes and development programs

3. TRAINING

- Someone in my office has been assigned the training responsibility e.g. Director of Development
- Each of the 13 Momentum Training Classes has been reviewed, the material downloaded and the videos (for brokers) watched
- In order to offer a complete training program I have identified other (non-Momentum) classes to incorporate
- Building a complete effective training calendar is part of my business plan.
- We have introduced at least one monthly course from the Momentum Training Program
- My training program is designed to offer value to both new and experienced agent

4. ACCOUNTABILITY

- I have had a one-on-one accountability session with at least one agent
- I have had one group accountability session
- I have facilitated at least one accountability group
- I have facilitated at least one mastermind group
- I have a system (structure and agenda) for my accountability sessions e.g.
 - Evaluate effort
 - Track progression
 - Identify strengths and weaknesses
 - Provide options
 - Direct back to training
- When I interview an agent one-on-one I ask the following questions:
 - On a scale of 1-10, how was your week?
 - What would have made it a 10?
 - What were your goals?
 - How did you do?
 - Discuss overall effort, strengths & weaknesses
 - If you had to do your week over again what would you do differently?
 - What was your biggest lesson from the week?
- I preview the upcoming week:
 - What are your goals for next week?
 - Is there anything keeping you from achieving your goals next week?
 - Is there any additional support or training you feel you need?
 - Great! See you next week.