February 7, 2016

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RET Accountability Plan Tutorial

Introduction

Given all the demands on a manager's time, it is difficult to monitor agents' progress and hold them accountable for activities, yet it is a critical management responsibility. A most common question managers ask is: "How do I get my agents to watch the videos?" (Or do anything for that matter). That takes leadership, inspiration and a system.

Because it is easier to get an agent to watch a video on prospecting than it is to get them do prospecting, we have created Accountability Plans that assign Videos and Tasks. It allows agents to report their Actions, and managers to monitor them.

This tool will provide the interaction between agent and manager and take the video training to a much higher level. When agents know you INspect what you EXpect, they are more likely to stay on track to perform critical activities. Activities lead to appointments which lead to transactions.

Available Templates as of February 6, 2016

At the time of this tutorial, we have three templates. By the time you are reading this, new ones may have been added and current ones modified.

New Agents: We have created a 14-section New Agent template in a suggested sequence. After you drag them into your preferred order, consider numbering them. You could use Months, Weeks or Steps. If you use units of time, be sure the work can be completed with in the time period.

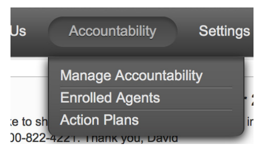
In most cases, new agents progress through a series of steps so consider using Step 1 Title, Step 2 Title, etc.

Rising Stars: This template allows you to take an experienced group of agents to the next production level in their career. The first group of Videos and Tasks, from Business Planning through Time Management are foundational and are to be performed one time.

The next group, from Time Management to Master Your Listing presentation are to be repeated every month, with some tasks to be performed and some quarterly.

Luxury Template: For those of you who would like to certify a group of agents to work the high priced market, this will serve as a basis for that training.

Accountability Plans



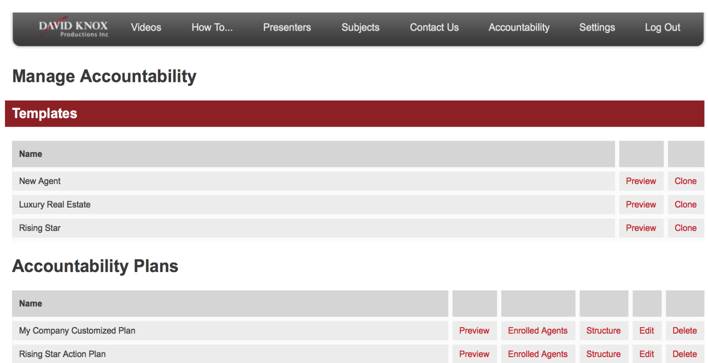
Accountability Plans work in the following steps: Clone, Edit, Save, Enroll Agents and monitor Progress. When you log into your account, go to menu "Manage Accountability."

Preview

Under Templates you will find pre-created Plans already there for you to use. Click Preview to see the detail.

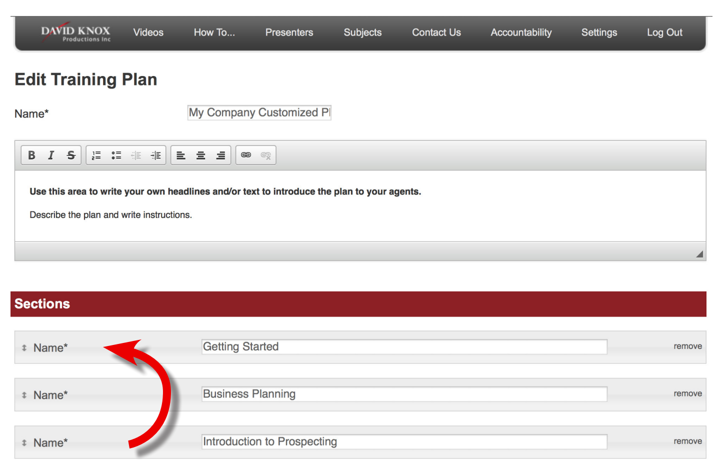
Clone

Click Clone and a copy of the plan will appear under the heading Accountability Plans.



Edit Structure

Click Structure to see the overall organization of the Plan. Change the name to your own title, then click the "Update Plan" button at the bottom.

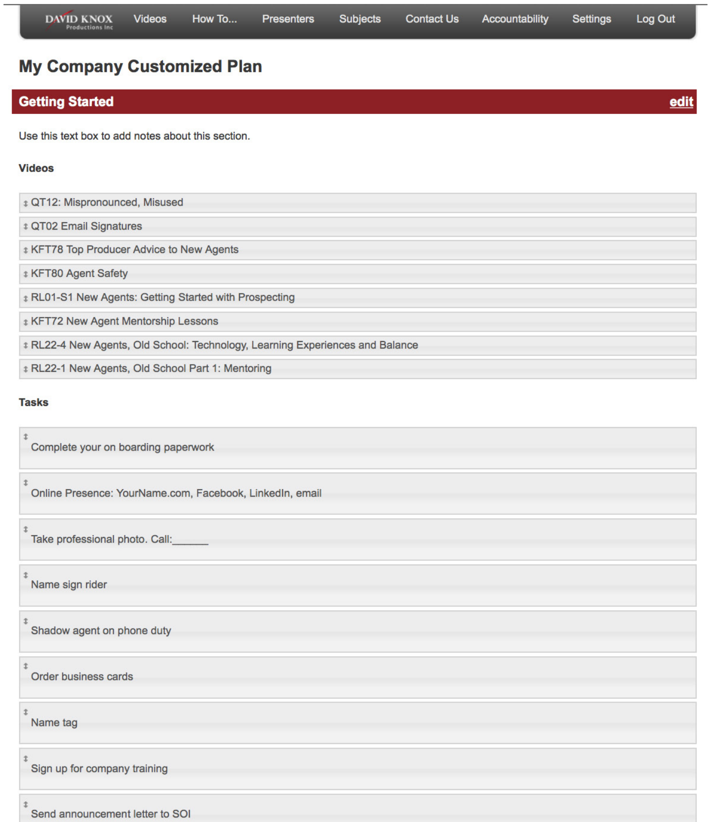


You may rearrange the sections by dragging, rename them by typing into the title field, delete them by clicking remove or add your own by clicking Add Section.

Click on *Name to rearrange sections.

Edit Plan

Return to Accountability Plans and click Edit. You will now see the Videos and Tasks for each section. In this view you may drag the boxes up and down to create your own sequence.

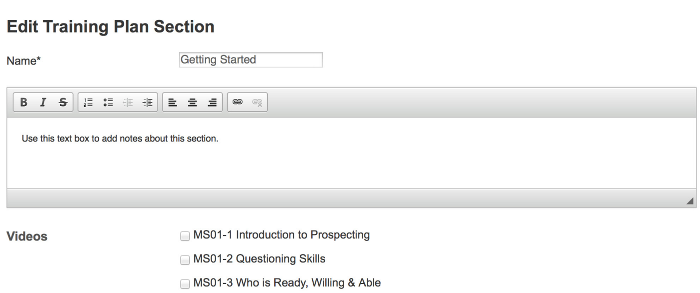


Edit Videos and Tasks

In the section header on the right, click Edit and you will be taken to the detail view which allows you to add or delete Videos and Tasks.

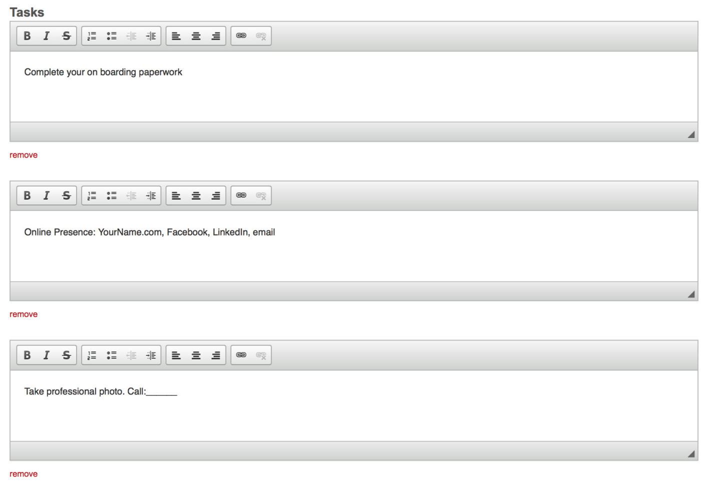
The Rich Text Box on top allows you to write instructions or make comments about each section

To delete videos, Remove the check marks in front of the title. Click an empty check box to add. (When you return to the edit plan view you may re-sequence them.)



Edit Tasks

To edit a task, click in the text field and type your changes. You may want to add your company name or specific feature to the generic task. To add a task, click Add Task on the bottom. Continue clicking and adding as you go. Be sure to click Update Section to save your work. To delete a Task, click Remove.



Personalize

Here is a list of suggestions for editing the standard template:

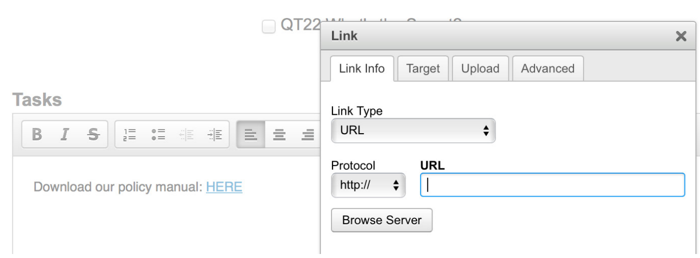
- Name a plan to match your company training name
- Personalize it by inserting your company name over generic company references
- Sequence sections to follow your training
- Add the specific names of your company features and other in-house terms
- Solicit suggestions from agents for tasks that they find helpful
- Break a large task into smaller tasks if appropriate

Rich Text Boxes

Rich text boxes allow you customize even further by uploading your own documents and adding active hyperlinks. This allows you to offer specific company documents, direct agents to specific websites and even reference your own videos.

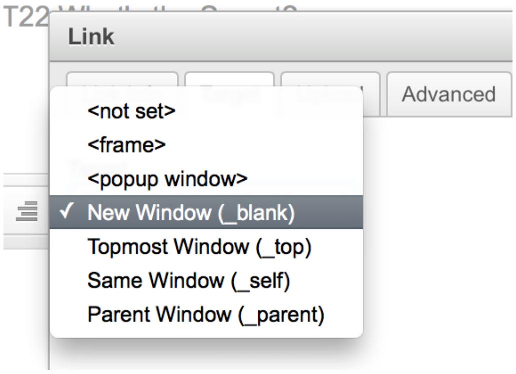
Hyperlink

Click the link icon on the right of the box. It will open another box allowing you to add a hyperlink



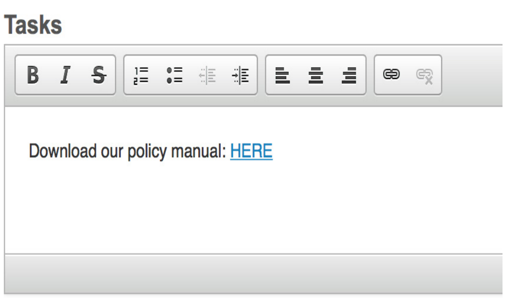
Copy the designated hyperlink from the actual website URL and paste it into the URL box. Next, select a target.

I suggest that you always target a New Window to open on top so agents won't lose their place in the action plan.

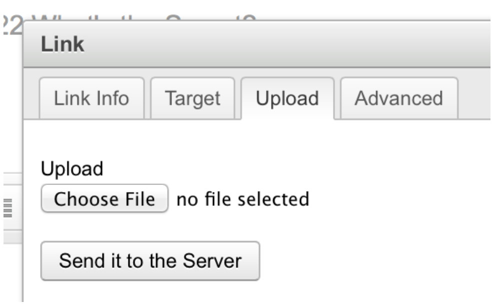


Upload a document

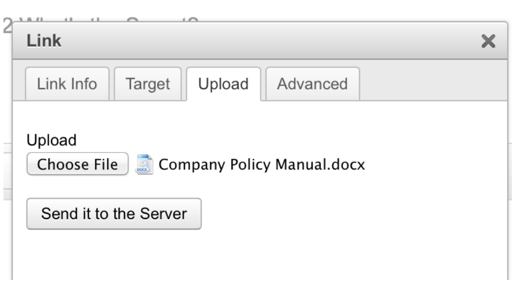
You now have the ability to upload all your specific company documents such as your Policy Manual, Training Manual, operating instructions, sample flyers and so much more. It is easy to attach these documents to their appropriate section and tasks.



First, write a sentence in the text box that directs agents to download the document. You could show the actual document URL or simply type the word HERE and apply the link to the word. Click and drag through the word, then lick on the link as before to get the link box. Click the Upload tab, then Choose File.



Navigate to your document. In this example a Word document called Company Policy Manual.

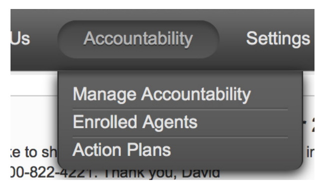


Click Send it to the Server and wait for confirmation of the upload. Larger files will take longer. Click OK.

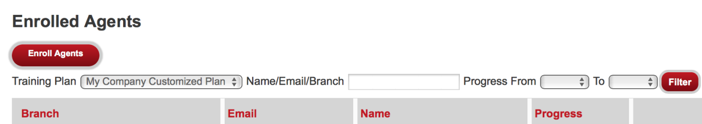
Now your agents will have a hyperlink available to download any of your company documents or be directed to outside online resources.

Enroll Agents

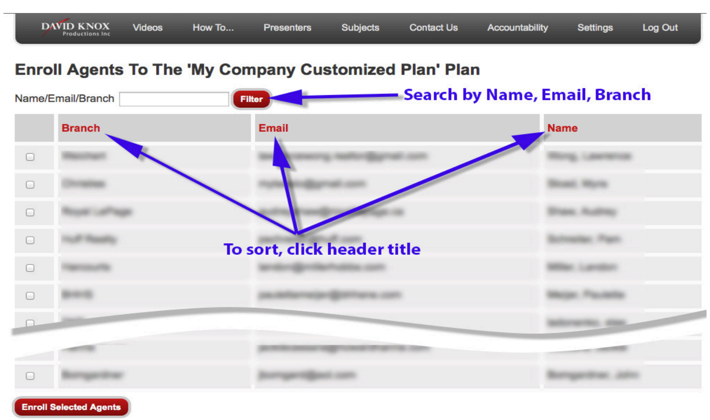
Once you have modified and saved your Accountability Plan, you may Enroll selected agents.



To do this, go to "Enrolled Agents." The first time you go to this menu it will be empty.

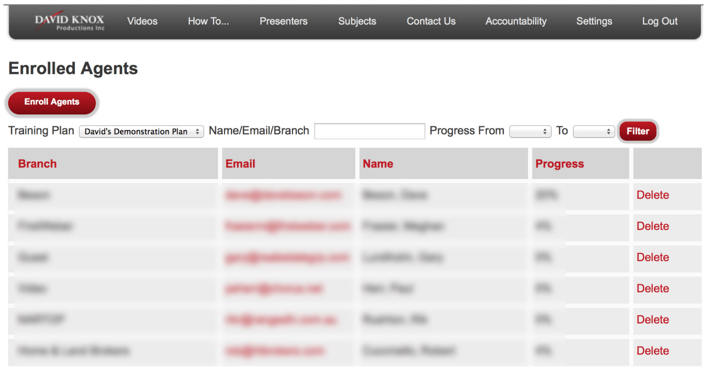


Click on the pull-down menu to select a plan, then click the "Enroll Agents" button on the left. You will see a list of agents by Branch, Email and Name.



To make it easier to find agents, you may use the Filter box to search. You may also sort by clicking the column titles. This is especially helpful for Administrators who will see the entire list of agents, whereas Managers will only see their agents.

Click the check box in front of the selected agent(s) to enroll then click the "Enroll Selected Agents" button at the bottom. You will now see the list of agents enrolled with their progress showing 0% complete.



When you click on their email, you will be able to preview the plan and specific progress. As agents complete tasks and videos, the percentage will change to show this.

Filter: You may filter your results by name, email or branch. You may also filter by Progress parameters.

Sort: By clicking the header titles, you may sort by Branch, Email, Name or Progress.

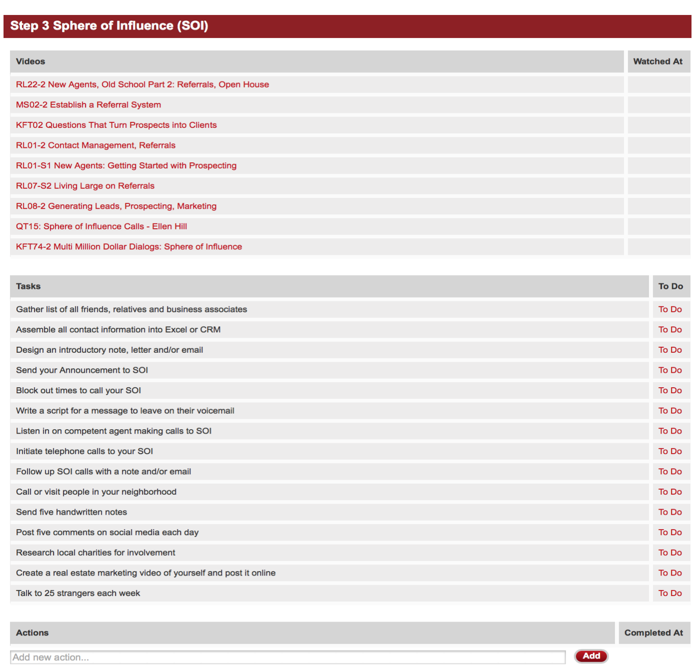
If you click "Delete" the plan will be removed.

Agent Experience

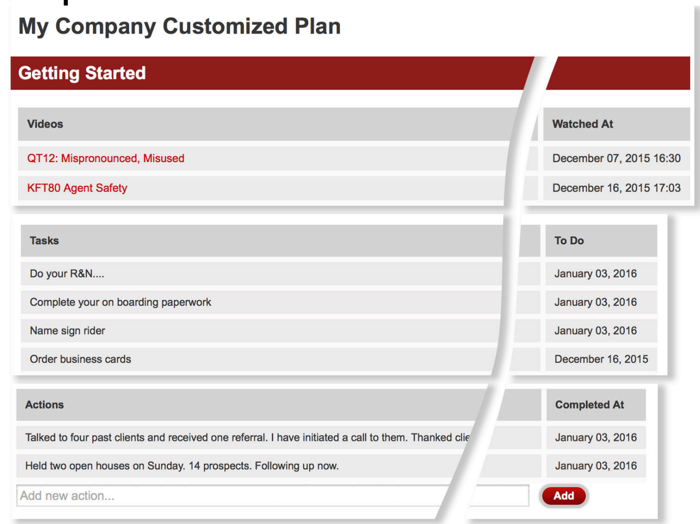
Once you have enrolled an agent into a plan, it will appear under their "Action Plans" menu. It will display "Start" if they are seeing it for the first time and "Continue" if they have already started and completed tasks.

Action Plan

The agent will see a list of Videos, Tasks and Actions.



Sample View

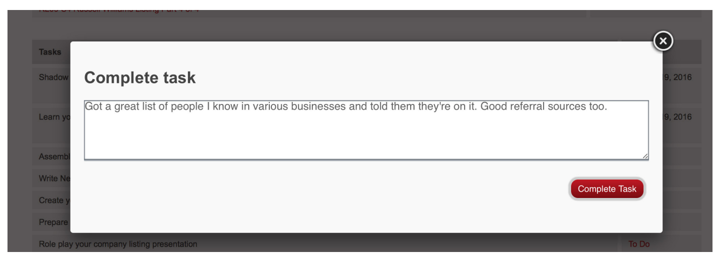


Videos

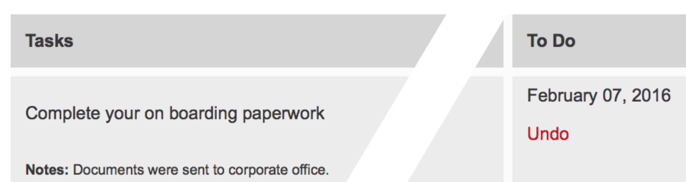
After logging in and clicking on an Action Plan, agents may watch Videos, complete Tasks and report Actions. To watch a video, they click on the red video title link and it will open in a separate window for watching. Their Action Plan and the manager's Accountability Plan will update to show the completion date.

Tasks

To indicate a completed task, agents click on the red To Do link. A dialog box opens that allows them to write any comments relating to that task.



When the "Complete Task" button is clicked the box closes and "To do" changes to a completion date. There is an Undo link available if clicked in error.



These notes allow Administrators and Managers gain more information on the task completion process.

Actions

The key to productivity is based in taking positive actions that lead to results. The Actions feature allows agents to post progress, prospecting activity, appointments and transactions.

Links and Downloads

When a task includes a link it may perform two actions: going to a website or downloading a document. If you targeted a new window then a second window will open on top of the training site.

If the link is to a document, it will open in a browser window. The agent will need to right click, control click or Save As to download the document.

A Word document will be saved to your Downloads folder.

Monitor Progress

The first step is to notify the agents you have enrolled in an Action Plan. Have them go to the Action Plans menu then click Start. After that they will click Continue and work their way through the designated plan.

The next step is for the manager to log in and monitor their agents' progress. See the overview of the progress percentage. Click a specific email to see detailed progress for each agent. Congratulate progress and question lack of progress.

What if they're not using it?

In addition to helping your agents grow and prosper in the business, this tool will help you determine who needs to be de-cruited. If they're not investing their time in education and productive activities, then you shouldn't be investing in them. Let Go.

Suggestions for hyperlinks

- Company website
- Company intranet portal
- Preferred lender
- Preferred title company
- Preferred insurance company
- Health insurance provider
- Professional photographer
- Inspector
- Company resources
- Training class sign up page
- Online document signing
- Local Board or Association
- NAR resources
- Company YouTube videos
- News articles
- Company Facebook business page
- Company vendors; signs, cards, etc.

Suggestions for documents and resources

- Company policy manual
- Company training manual, chapter per section
- Company listing presentation
- Listing agreement
- Buyer agreement
- Disclosure forms
- Checkists
- Any documents your company uses

Updates

We welcome your suggestions for Accountability Plans, task additions and features.

Summary

Remember to:

Clone

Name

Edit

Save

Enroll

Monitor progress