Description

This workshop helps agents understand the importance of leveraging systems, processes, and checklists to run a successful business. We explore three potential methods and best practices for creating and marketing your strategies.

Deliverables

Agents come away with several system ideas for streamlining their business. In addition, a brainstorming session encourages agents to collaborate and build a specific checklist or template they can implement immediately.

Preparation

Provide attendees with the following handouts: 10 Checklist Templates (Word document, print and/or distribute electronically) and Blank Calendar Template (Excel document, distribute electronically).

Live Workshop

- Have a computer, projector, and screen/monitor available for displaying the video.
- Set up a whiteboard or flip chart and markers for recording brainstorming responses.
- TIP: *Arrange tables and chairs in a horseshoe shape so attendees can easily view the video and interact with one another during brainstorming sessions.*

Virtual Workshop

- Select a virtual meeting platform that allows for screen sharing, such as Zoom or Google Meet.
- When sharing the video, also share computer audio.
- Assign a notetaker for the brainstorming sessions.
- Encourage attendees to turn on their cameras to maximize engagement and participation.
- TIP: *If your group is large, consider using the chat feature or breakout rooms for brainstorming.*

Instructions

1. Play the video.
2. Facilitate a brainstorming session after viewing the video:
    - Identify checklists and templates that would help your business.
    - As a group, choose one checklist or template and list tasks and action items needed to create a system.
3. Record responses on the whiteboard/flip chart. Suggest agents take a picture (or screenshot if virtual) of the ideas on the whiteboard/flip chart to reference later. Otherwise, ask a support staff person to create a document to send after the workshop.

Next Steps: Go Above & Beyond

- Consider facilitating additional mastermind sessions to create systems recommended during the workshop video.
- At the next sales meeting, ask attendees to share their experiences and results. Public sharing promotes attendance at future workshops and fosters a collaborative environment.
- Follow up individually with agents you are mentoring to facilitate the application of new ideas and share successes.
- Track the efficacy of your company's learning opportunities. During the next 6-12 months, compare your listing count to the same time the previous year. You are checking to see if an increase is attributable to new skills gained from learning. It typically takes 120 days between skills taught and production increase.