



# How to Run a Successful Agent Mastermind

## What is a Mastermind?

A mastermind is a structured approach for peer-to-peer knowledge sharing and troubleshooting. Sometimes your best training resource is the wisdom of the agents, managers, and owners themselves. Furthermore, learners often perceive more value when they learn from one another rather than a top-down approach from management.

## Mastermind Objectives

Agents will identify creative and practical solutions to common challenges. When your team learns from each other, the whole company benefits.

## Mastermind Types

- **Open**—Agents choose the topic(s) of discussion.
- **Structured**—Facilitator chooses the topic(s) of discussion (in part or in whole).

## Key Roles

- **Moderator/Facilitator** (1 for the mastermind)
  - Subject expertise.
  - Ability to summarize.
  - Can manage group dynamics.
- **Mastermind Participants**
  - For discussion, group agents by similar production or skillsets when possible. If there is too much variation among participants, top producers may spend less time learning from others and more time explaining how they solved past problems.
  - Consider creating invite-only mastermind sessions for specific production levels or skillsets.

### Group Leader (1 per discussion group)

- Keeps group on task.
- Allows everyone to contribute.

### Group Scribe (1 per discussion group)

- Attention to detail.
- Captures and distills key learnings, not just a note-taker.

## Running A Successful Mastermind

### Before the Mastermind

- Invite your participants.
- *Optional*—survey the group to see what pressing issues they are currently experiencing.

### Day of the Mastermind

1. **Set the Stage:** Participants may need your leadership to get into a sharing mindset. If needed, consider a short ice-breaker activity. Also be prepared to “prime the pump” with ideas to contribute to the discussion.
2. **Topic Identification (10 minutes):** Identify the challenge to solve during the group discussion.
  - If you did a pre-event survey, choose one of the suggested topics to investigate.
  - Ask participants to describe their challenges.
  - Write responses on a board/flip chart until you develop a clear idea of the focus of your group discussion.
3. **Group Discussion (25 minutes):** Brainstorm challenge solutions, action steps, and best practices.
  - If appropriate, break into smaller groups (ideally 5 to 6 people so everyone can contribute) and plan to come back together as a large group for the debrief.
  - Identify a leader (keeps group on task) and a scribe (takes notes and reports during the debrief) for each group.
  - The mastermind facilitator ensures groups are staying on task and listens to the discussions, making note of additional information to share during the debrief.
4. **Debrief for Multiple Groups (20 minutes)**
  - Bring all the groups together and ask each group to present one idea at a time.
  - Continue until there are no more ideas to share. This prevents hearing from only one or two groups and gives everyone a chance to share.
5. **Wrapping Up:** Collect the notes from each group so you can share them with all the participants after the meeting. Ask participants for feedback either informally or through a survey.