



A simple program for your leadership to mentor agents one-on-one demonstrates your company's investment in agent growth and success. Benefits include agent loyalty, increased production, and a positive company culture.

Getting Started

When & Where

- **Location:** Determine if your sessions will be in person, virtual, or over the phone. The setting chosen will be based on individual preferences; each option has benefits and drawbacks.
- **Frequency & Duration:** We recommend starting with monthly sessions that last 20 minutes.
- **Date & Time:** Be consistent with each agent's meeting day and time (i.e., first Tuesday of the month). Make it a non-negotiable calendar entry and show you are invested in your agent's success.
- **Do Not Disturb:** Set your phone to silent, put a do not disturb sign on your office door, and don't allow anyone to interrupt. The greatest resource you can give your agent is 100% of your attention.

How many agents will you mentor?

When you first launch your program, mentoring all of your agents may not be realistic. Determine the time you have to invest and how many agents this equates to. We recommend starting small. It is easier to add more agents to the mentoring program than it is to cut someone off.

Who will you mentor?

Once you know how many agents you can effectively mentor, determine which agents offer the best return on your investment of time.

- **Engaged Agents:** You can lead a horse to water but can't make it drink. Start with agents who you know will embrace the program. They will make excellent ambassadors for your program as it grows.
- **Newer Agents:** Agents are most likely to switch brokerages during their first five years in the business. Mentoring these agents will help you maintain an experienced agent roster.





Successful Agent Mentoring

Agent Binders

Create a 3-ring binder for each agent to keep track of your sessions. It will be helpful to refer back to this information. The following items should be included:

- **Agent Profile:** The first page on your binder should be the Agent Profile. This document provides personal information about your agent, such as birthday, family, and communication preferences. Reviewing this information before sessions will show you care and keep you from being caught off guard.
- **Goals:** Knowing your agents' goals allows you to keep them accountable and offer necessary support. Ask your agents to share their business plan and/or have them complete this Agent Mentoring Questionnaire.
- **Agent Data:** Collect your agent's production data for key metrics (listings taken, closed units, closed GCI) from your company reports for year-to-date and year-over-year. Use this data to identify areas for improvement and set goals.
- **Session Notes:** Taking detailed notes of each session is essential for accountability and measuring success. Our Mentoring Session Notes suggest you record the following:
 - Recent Successes
 - Current Challenges
 - Personal Life Notes
 - Agent's Action Items
 - My Action Items (things you offered to do to support your agent).



Mentoring Sessions

Your goal is to guide your agents to self-discovery. People are more likely to act when they are in the driver's seat. Once your agent makes a discovery and sets a goal, share knowledge, insights, and tools to help them succeed.

- Ask open-ended questions that can't be answered with a yes or no whenever possible. Examples include: How is your goal of XYZ coming along? What would it look like if...? How is that working?
- Start each meeting by asking about decisions made during the last session.
- Don't be afraid to poke the bear. Ask questions that will take them outside their comfort zone and lead them to growth. Example: "What has been holding you back from approaching the FSBO in your neighborhood?"
- Ask questions that relate to your company offerings, such as sales meetings and training sessions. These questions allow you to personalize support and reinforce the value of your company's offerings.
- End the meeting by asking the agent what they will work on between now and your next session. Jot this down in your Mentoring Session Notes so you can follow up.

After the Session

- Make it a goal to do one personal touch before the next meeting. Example: Send your agent a text regarding a positive experience they shared, "I can't stop thinking about the showing you had on Carter Street. GREAT job! Let me know how it works out."
- Follow through with your promises of support. Doing so will build trust and show your integrity.



Mentoring: *Agent Profile*

Name: _____

Address: _____

Email: _____

Phone: _____

Date Licensed: _____

Start Date: _____

Birthday

Favorite Treat
(coffee, candy, etc.)

Preferred Communication Method

email text phone call other _____

Family

Hobbies

Notes



Agent Mentoring Questionnaire

Agent's Name _____ **Date** _____

Do you have an annual income or production goal?

Yes, \$ _____

Are you on target to reach your goal?

- Yes
- No
- I don't know

No

- I am in the process of setting my goal.
- I need help setting my goal.

Do you have any personal goals? If so, please specify.

Please share a recent accomplishment you are proud of (personal or professional).

Do you need help with the following?

- | | |
|--|---|
| <input type="checkbox"/> Prospecting/Farming | <input type="checkbox"/> Successful Open Houses |
| <input type="checkbox"/> Seller/Listing Presentation | <input type="checkbox"/> Building a Database |
| <input type="checkbox"/> CMA Preparation | <input type="checkbox"/> Technology/Software |
| <input type="checkbox"/> Buyer Presentation | <input type="checkbox"/> MLS |
| <input type="checkbox"/> Marketing | <input type="checkbox"/> CRM Selection & Management |
| <input type="checkbox"/> Contracts | <input type="checkbox"/> Other _____ |
| <input type="checkbox"/> Negotiations | <input type="checkbox"/> Other _____ |

Do you have any questions, comments, or ideas to share?



Mentoring Session Notes

Agent's Name _____

Date _____

Questions I Asked

Agent's Recent Successes

Agent's Current Challenges

Agent's Personal Life Notes

Agent's Action Items

My Action Items

Questions to Ask Next Session