

| THE HEYL GROUP at KELLER WILLIAMS REALTY | | First 100 Days Inside Sales Agent | | |
|---|---|--------------------------------------|-------------|-------------------------|
| Name | Date | | | |
| 0-30 Days | | | | |
| <input checked="" type="checkbox"/> Indicates the activity is completed | | | | |
| Orientation - Day 1 | | | | |
| | Appointment w/coach for expectations discussion | Target Date | Actual Date | Who |
| | Schedule Daily KASH Talk and Daily Review Mtg for first week | | | You/Coach |
| | Review The Heyl Group MVVBP | | | You/Coach |
| | Sign off on Expectations paperwork | | | You |
| | Finalize Employee Agreement, non-compete/disclose & onboarding paperwork | | | You / Allie |
| | Set up gmail; sync with cell phone | | | You / Allie / MC Tech |
| | Set up The Heyl Group signature | | | You / Allie |
| | Order Keys, key card, Business Cards | | | You / Allie / Christian |
| | Get set up on Smartsheet, Gmail, MOJO, MLS, BoomTown, Work.com (chatter desktop/App) - save as web bookmarks | | | You/Allie |
| | Schedule technology training with coach to debrief what you will be using | | | You/Coach |
| | Schedule Photo Shoot for headshot | | | Christian |
| | Set up cell phone voicemail with Heyl Group greeting | | | You |
| | Add The Heyl Group on FB/Linked In page as new place of employment. Make a post about your first day. | | | You |
| | Market Center tour | | | Agent Srvc |
| | Set up wireless access to WiFi and copier/printer | | | MC Tech |
| | Calendar 1 hour with Lead Buyer specialist to go over Buyer Presentation | | | Seth |
| | Download Heyl Group Script Book | | | Coach |
| | Calendar 1 hour with Listing specialist to go over Listing Presentation | | | Katie |
| | Meet: Team Leader _____ Asst. Team Leader _____ MCA _____ Agent Services _____ DOFI _____ | | | Market Center |
| Orientation - Day 2 | | | | |
| | Begin Compiling Sphere list of emails | Target Date | Actual Date | Who |
| | Review KWConnect, Agent Mountain, KWU, and Dropbox Education folder | | | You |
| | Schedule Weekly Coaching / Accountability Session | | | You / Coach |
| | Shadowing with existing ISA team / Chant, Roleplay and Handwrite XW Script | | | You |
| | Schedule BoomTown Training | | | You / Coach |
| | Overview - watch BoomTown training videos, surf on your own, overview with Coach | | | |
| | Adding a contact | | | |
| | Lead Sources | | | |
| | Drip Campaigns | | | |
| | Phases of the pipeline | | | |
| | Daily Expectations | | | |
| Orientation - Day 3 | | | | |
| | Read/Study Heyl Group Resume and Listing Presentation Video | Target Date | Actual Date | Who |
| | Write Book Report / Brief Value Proposition Outline based off Video and Resume | | | You |
| | Read/Study Buyer and Seller Guides | | | You |
| | Write brief summary around Buyer and Seller guides | | | You |
| | Shadow Existing ISA Team / Chant, Roleplay and Handwrite FSBO Script | | | You |
| | Send Bio/Photo to Allie to add to Websites | | | You |
| Orientation - Day 4 | | | | |
| | Shadow Existing ISA Team / Chant, Roleplay and Handwrite Objection Handlers | Target Date | Actual Date | Who |
| | Set up the following training/shadowing appointments with our team members: | | | You |
| | Listing Presentation w/ Listing Specialist (2hrs) | | | |
| | MLS CMA Basics w/ Listing Specialist (1 hr) | | | |
| | Client Communication and Processing Overview with Client Experience Manager (3 hrs) | | | |
| | ISA Outbound Call Sessions (4 3hr morning sessions) | | | |
| | Inbound Marketing Sources Overview w/ Lead Coord (1 Hr) | | | |
| | Buyer Calls w/ Buyer agents (2 hrs) | | | |
| Orientation - Day 5 | | | | |
| | Training: Time Blocking; Identify ONE Thing and set up calendar / Begin Reading the One Thing and MREA | Target Date | Actual Date | Who |
| | Confirm Calendar Sharing with Team | | | You / Coach |
| | Shadow Existing ISA Team / Chant, Roleplay and Handwrite Pre-qualification Script | | | You |
| | Train on rest of Technology specific to position | | | You / Coach |
| | Understand all available MOJO lists to call (old leads) | | | You / Coach |
| Orientation - Week 1 | | | | |
| | Introduce to team - attend first Heyl Group team meeting | Target Date | Actual Date | Who |
| | Complete setup with Market Center and local board of Realtors - sign up for MLS training | | | You |
| | "Like" The Heyl Group on FB / Twitter / Pinterest / LinkedIN | | | You |
| | Review our Websites - locationaustin.com, ultimatesellingexperience.com, livewestlakehills.com, heyrealestate.com, whatsmystalkahomeworth.com, atxhomeworth.com | | | You |
| | Watch Keller Williams Agent Orientation Videos | | | You |
| | NOTE: In video, training program named 4:4:3 has recently been updated & re-named IGNITE | | | |
| | "KWU Training and Education" (6:05) | | | You |
| | "KWConnect Distance Learning On Demand" (5:25) | | | You |
| | Watch The Keller Williams Story Videos | | | - |
| | "Our History" (5:52) | | | You |

| | | | | | |
|-------------------------------------|---|--------------------|--------------------|------------|--------------------|
| | "MVVBP" (5:32) | | | | You |
| | "Who's Who in the Field" (3:02) | | | | You |
| | "Kellerisms" (3:56) | | | | You |
| | Watch Keller Williams Models Video | | | - | - |
| | "Follow the Models" (20:11) | | | | You |
| Orientation - Week 2 | | Target Date | Actual Date | Who | |
| | Get your File uploaded to Work.com - DISC/AVA, Life Story, Career Book, other if there is more | | | | Coach |
| | Schedule Tracking training with Allie - You are now responsible for adding your numbers | | | | You / Allie |
| Technology Training | | | | | |
| | Schedule Training w/ Listing Specialist: MLS Basics and Pulling a Good CMA, tax info, creating net sheets | | | | You/Katie |
| | Sign up for Classroom and Scholar Series in BoomTown if you still need training assistance | | | | You |
| Orientation - Week 3 | | Target Date | Actual Date | Who | |
| | Complete Growth Plan, GPS & 411 Goals | | | | w/ Coach |
| | Email Coach your Sphere Emails - FINAL DUE DATE | | | | You |
| Orientation - Week 4 | | Target Date | Actual Date | Who | |
| | Connect w / 1 Networking Group on FB Specific to ISAs, find a Roleplay Partner | | | | You |
| GENERAL TRAINING - 0-30 Days | | | | | |
| | Watch Listing Presentation Video 8x (2/week) | | | | You |
| | 1 CMA/Day - save and present at each meeting with coach | | | | You |
| | Training: Shadow Listing Manager OR Listing Agent on the following topics | | | | You / Listing Team |
| | Price Reductions | | | | |
| | Presenting Offer | | | | |
| | Weekly Listing Calls (Shadow at least 5 full calls and the work leading up to the call) | | | | |
| | Negotiations (shadow BA and LS) | | | | |
| | Meet with Title Rep or Closer - Understand Title 101 | | | | You |
| | Meet with Home Warranty Rep - Understand Home Warranty 101 | | | | You |
| | Shadow Listing Specialist on 2 appts | | | | w/LS |
| | 10 Hours per week Shadowing ISAs to understand who they call and how those conversations go | | | | w/ ISAs |
| Role-Play / Scripting | | | | | |
| | Read/Write/Chant Prospecting Scripts 2 hours/day (XW, FSBO, Objection Handlers, Pre-Quals, Buyer Scripts) | | | | You |
| | Role Play Scripts with Coach 1/week other ISAs or Roleplay Partners 1/day | | | | You / Coach / ISAs |
| Coaching | | | | | |
| | Coaching mtg 1/wk - utilize work.com coaching section - USE 411 | | | | w/ coach |
| | Attend weekly team meetings | | | | You |
| Lead Gen | | | | | |
| | 2-3 Nurtures / day AND 2 to 5 Appts per week | | | | You |
| | Sign 1 Business up for Co-Marketing for 12 months | | | | You |
| Reading / Classes | | | | | |
| | Complete Reading MREA | | | | You |
| | Read MREA Buyer Specialist | | | | You |
| | Attend Lender Ignite Class | | | | You |
| | Attend Prospecting Ignite Class | | | | You |
| | Complete Reading <i>The ONE THING...by Gary Keller</i> | | | | You |
| Milestone Tasks | | | | | |
| | Understand Lead Gen Process (Marketing and Prospecting) | | | | You |
| | Understanding of Listing Process | | | | You |
| | Understanding of Transaction Process | | | | You |
| | Develop Pricing Skill | | | | You |
| | Speak Heyl Group Language | | | | You |
| | Maintain time-blocking habit | | | | You |
| | YOU MADE IT THROUGH THE FIRST 30 DAYS!!! CONGRATS!!! | | | | |
| 31-60 Days | | | | | |
| | <input checked="" type="checkbox"/> Indicates the activity is completed | | | | |
| General Training | | Target Date | Actual Date | Who | |
| | Create Growth Plan - use KWU, MC, Agent Mountain, KWConnect Resources | | | | You |
| | MAPS Creating Urgency in Buyers 1 / Day | | | | You |
| | Review 'Six Personal Perspectives' on KW.com - watch videos on KWConnect | | | | You |
| | Complete Buyer Mastery Training | | | | You |
| | MAPS Finding the Motivated Audio | | | | You |
| | Create personal Map of market area with notes on neighborhoods and pricepoints | | | | You |
| Technology Training | | | | | |
| | Finalize mastery of ALL Heyl Group Systems | | | | You |

| | | | | |
|----------------------------|---|--------------------|--------------------|--------------------|
| Role Play | | | | |
| | Read/Write/Chant Prospecting Scripts 2 hours/day (XW, FSBO, Objection Handlers, Pre-Quals, Buyer Scripts) - Until Tested Out | | | |
| | Role Play Scripts with Coach 1/week other ISAs Roleplay Partners 1/day | | | You |
| Coaching | | | | |
| | Coaching Call 1x/week - use 411 | | | You/Coach |
| | Record Buyer Consultation w/ Real Buyer and send to coach | | | You |
| | Attend weekly team Meetings | | | You/team |
| Lead Gen | | | | |
| | 5 Nurtures / Day on Avg AND 8 Listing Appts per Wk | | | You |
| Milestone Tasks | | | | |
| | Competency w/ Buyer Presentations & Handling Buyer Objections | | | |
| | Maintain time-blocking habit | | | |
| | YOU MADE IT THROUGH THE FIRST 60 DAYS!!! AWESOME!!! | | | |
| 61-100 Days | | | | |
| | <input checked="" type="checkbox"/> Indicates the activity is completed | | | |
| General Training | | Target Date | Actual Date | Who |
| | Update Growth Plan | | | You |
| | MAPS Creating Urgency in Buyers - Finalize | | | You |
| Technology Training | | | | |
| | | | | |
| Role Play | | | | |
| | Role Play Scripts with Coach 1/week other ISAs Roleplay Partners 1/day | | | You / Coach / ISAs |
| Coaching | | | | |
| | Coaching Meeting 1x/week - USE 411 | | | You / Coach |
| | Coach to Listen to Recorded Listing and Buyer Calls w/ Real Sellers and Buyers - Daily Until Tested Out | | | You / Coach |
| | Attend weekly Team and Sales Meetings | | | You |
| Reading | | | | |
| | 5 <i>Dysfunctions of a Team</i> | | | You |
| | Your First Home...by Gary Keller | | | You |
| Lead Gen | | | | |
| | 5 Nurtures / Day on Avg AND 8 Listing Appts per Wk | | | You |
| Milestone Tasks | | | | |
| | Maintain time-blocking habit | | | |
| | YOU MADE IT THROUGH THE FIRST 100 DAYS!!! WAY TO GO ROCKSTAR!!! | | | |
| Post 100 Days | | | | |
| | <input checked="" type="checkbox"/> Indicates the activity is completed | | | |
| General Training | | Target Date | Actual Date | Who |
| | Update Growth Plan Monthly | | | You |
| | MAPS Language of Sales (take actual live course) | | | You |
| | Quantum Leap Live Course in Austin | | | You |
| | RSTLM (if you plan to hire leverage) live in Austin | | | You |
| | Power Propecting with Bill Crespo | | | |
| Coaching | | | | |
| | Coaching Meeting 1x/week - USE 411 | | | w/coach |
| | Attend weekly Team and Sales Meetings | | | You |
| Lead Gen | | | | |
| | 5 Nurtures / Day on Avg AND 8 Appts per Wk | | | You |
| Milestone Tasks | | | | |
| | Maintain time-blocking habit | | | |