10 STEP SYSTEM FOR RECRUITING EXPERIENCED AGENTS

INNER CIRCLE BROKER COACHING

1 Set Business Goals and creating Vision for Growth – Recruiting and growth

a. Complete the ICBC Budget Wizard (see Financial Management) – provides recruiting and retention goals for next 12 months

b. Break out goals for new and experienced agents (fix on budget wizard), and timing.

c. Ensure ICBC Recruiting Pipeline (CRM) is complete on the ICBC Recruiting Dashboard (Activity Scorecard)

d. Video:

   i. CMSB – Overview of Recruiting

   ii. CMSB – The Law of Incremental Contribution

   iii. CMSB - The Mindset

2 The ICBC Recruiting Business Planner

a. Identify our recruiting resource(s)

   i. Who, time available, complete the ICBC JRO Calculator, for the appropriate job title below.

   ii. Internal Sales Associate - ISA (appointment setting only)

      i. Decide onshore vs offshore based on market size and budget

      ii.See ICBC ISA JRO (PDF)

      iii. Recruiter (appointment setting and execution to DM)

         i. See ICBC Recruiter JRO (PDF)

      iv. Manager (Goals, appointment setting, execution and Closed and Won)

b. Complete ICBC Recruiting Business Planner (revise for modelling – insertion of conversion alternatives showing scenarios), accordingly, to identify activity and time required for experienced agents

c. Create the ICBC Ideal Week – time blocking above time, ICBC Manager JRO, ICBC Ideal Week Wizard

d. Video – Prospecting – Dialing for Dollars and call Aversion – ICBC Planner, time block

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3 Review Past 12 month Recruiting Successes – Experienced only

a. Reflect on the process and the specifics around the agents that came on board – ICBC Reflection Document
    i. Document agents that chose someone else or stayed where they are – why?
b. Find out from them why, get testimonial from each – ICBC Testimonial Template Details around lead, appointment, pricing, timing, and close
c. Complete the ICBC SWOT Wizard on last year's results
    i. Be specific about strengths – only differentiators
    ii. Be specific about weaknesses
    iii. Be specific about opportunities
    iv. Be specific about threats

4 Create Value Proposition and Recruiting Presentation

a. Decide on a pricing model
    i. Refer to the ICBC Budget Calculator to determine average contribution target
    ii. Design compensation models to fit average contribution
b. Detail this plan out in "Uniqueness in Marketplace"
    i. Existing value prop
    ii. Plan for improvement
    iii. Create ICBC Competitive Comparison Chart (Revised into a Wizard)
c. Use ICBC Competitive Comparison Chart from above to update "Agent Business Case" template
d. Define your ideal agent target – specifics on volume, values, geography, etc. e. Video:
    i. Conveying Value and Wealth Creation
    ii. Principle of Attraction – focus on Values
    iii. CMSB – Appointment Execution #1 – collateral material Appointment Agenda, ICBC Gap Questions (prospect's goals, awareness of brokerage, where business comes from, their challenges)
    iv. Passion – getting bold about commitment and belief
    v. Creating Competitive Comparison
e. Complete the steps in the ICBC Guide to the Ideal Recruiting Presentation

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5 Creating your Prospect List for Your Dream Team

a. Complete the ICBC List Requirement Calculator

b. Identify # of prospects required

c. Identify your ideal ICBC Dream Team candidate

   i. Values

   ii. Production

   iii. Years experience

   iv. Geography

   v. Market focus

d. Populate list

   i. Co-broke

   ii. agent referrals,

   iii. trade records,

   iv. showings,

   v. purchased and board lists

e. Enter contact information into the ICBC Recruiting CRM

   i. Name

   ii. Brokerage

   iii. Years in business

   iv. Volume

   v. Email

   vi. Cell phone #

   vii. Home address

   viii. Notes

f. Video:

   i. The Power of Notes

   ii. Building Your List

   iii. CMSB - Qualifying and Booking Appointments #1

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6 Honing our Process – Recruit to Retain (3 Circles)

a. Create front end prospecting process
   i. Telephone – IM, script,
   ii. Text, Messaging, etc
   iii. Email
   iv. Video – CMSB – Qualifying and Booking Appointments Part 2

b. Outsourced Telemarketing process
   i. Identify the right service to use
   ii. Create and train script – Use ICBC Telephone Script Guideline
   iii. Practice and set appointment targets
   iv. "No-show" elimination process – define and implement
   v. Report results including recorded calls – review and reflect on ROI

c. Practice front end prospecting process
   i. Write your own script
   ii. roll play, record

d. Create Appointment process using ICBC Agent Business Case Template
   i. Use past appointment to map out agenda, gap questions, and business case. Create a story for each type of clients we want to bring on board.
   ii. Use the "ICBC Decision Making Process" doc
   iii. Roll play with ICBC coach – start of the ICBC Perfect Retention Process

e. Video:
   i. CMSB – Qualifying and Booking Appointments Part 1, Part 2, Part 3

7 Implement 2 Key Channels of Prospects – ongoing Co-broke and Agent Referral Strategy

a. Implement the ICBC Co-Broke Strategy checklist

b. Implement the ICBC Agent Referral checklist

c. Video:
   i. Co-Broke strategy video
   ii. Agent Referral video – ICBC Referral Document/Script

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8 Time Block and Implement

a. Time block in calendar prospecting and appointment time based on above

b. Set up ICBC Activity Scorecard on a daily, weekly basis

c. Start prospecting and record results

d. Video

   i. Prospecting – Dialing for Dollars and Call Aversion

9 Creating Relationships with Your Dream Team List

a. Document marketing plan in creating/touching your Dream Team community

   i. Social media – advertising, non-branded groups, following

   ii. Touches per year– IM, email, BombBomb, direct mail, etc.

   iii. Agent Appreciation events – How many per year?

   iv. Website and other collateral

   v. ICBC Testimonial Videos (refer to contest strategy)

   vi. “Be Their Broker” – ICBC Content Video

b. Marketing Collateral

   i. In-source vs outsource – analysis

   ii. Digital and print

   iii. ICBC Vendor/Solution list

10 Reflection and Strategy Adjustment

a. Review results with ICBC Coach at each Implementation Call

   i. Conversion results

   ii. Success specifics

   iii. Failure specifics

b. Video:

   i. CMSB – Marketing and CRM – ICBC CRM Setup Guide

   ii. CMSB - Activity Management - ICBC Activity Tracker

*an experienced recruit is defined as someone who transfers their licence from another broker

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