# Office Owner Post training

# On-Boarding Activities for New Associate

**Weekly Coaching Meeting- Schedule regular day and time for weekly Coaching Meeting.**

Recommended Agenda for Weekly Calls:

1. Seminars and other prospecting events for the week.
2. Review of upcoming webinars and other events to promote
3. Review any PFA’s currently in pipeline
   1. Discuss what to present/ how to present (see inventory horses development below)
   2. Role Play as needed
4. Inventory Horses development
   1. Identify 15-25 horses for the New FranNet Associate to study
   2. Each week, NA to present 2 -3 concepts to coach, varying by buyer motives
5. Review of Metrics (Leads, Appointments, Discovery Days, Closes) - what needs to be done with each client to get them to the next step; what's between the client and the finish line?
6. Marketing Activities (Cultivating leads sources, especially, “what are we going to do this week) agreed-upon activities, expectations, results
7. Technology
8. New things from Corporate
9. Admin Issues
10. What else?

* **Associate to attend all seminar presentations done by Office owner for 1st three months or a minimum of six seminars.**
  + **Debrief with Associate after each presentation**
* **Office Owner attends the first six (6) seminar/presentations done by Associate.**
  + **Debrief with Associate after each presentation**
* **Associate to attend 12 client meetings with Office Owner:**
  + First three client meetings – NA to observe; listen, and make notes but not participating
  + Next three client meetings –NA to "lightly participate" – where they asked the occasional questions, but Office Owner carries the majority of the meeting
  + Next three meetings – NA to lead the meeting; Office Owner is still actively participating, but only when the NA misses key pain discovery opportunities
  + Next three meetings – NA to lead the meeting; Office Owner will observe; listen, and make notes but will not participate except for critical “save” situations

**Debrief with Associate after each client meeting**

* What were the NA’s key observations of the meeting?
* what concepts would the NA have presented? Why?
* Office Owner then discuss what their key observations were
* Office Owner to explain why they presented the concepts they did; also explain the reasons for showing the deal the way they did