

# Mentor Program

## Experienced Agent Guidelines

- Set appointment with Mentee for initial meeting. Allow 1 hour for meetings.
- Initial meeting
  - Give Agent Mentor Program Documents
    - Copy of Mentor Program Agreement
    - Intro to Mentor Program Letter
    - Copy of Checklist
  - Go over Mentor/Mentee Agreement
  - Go over Mentor Program Introduction
    - Set expectations for agent
    - Set expectations for your availability & responsibilities
    - Discuss onboarding emails & answer any questions
      - Listings to Transfer?
      - MX1 Policies & Procedures
      - MaximumOne.pro Email
      - Contacting Broker Support
      - Paperless Pipeline
      - Board of Realtors
      - HUD Home Procedures
      - Agent Websites
      - Who's Who at MX1
      - Agent Billing, Bill.com
    - Go over Mentee Checklist & check off completed items
    - Go over Post Licensing CE requirements (MX1 Booklet)
    - Allow time for Agent questions / discussion
    - Ask "Do you have q's about anything RE related we haven't covered?"
  - Paperless Pipeline Discussion
    - Mentee **MUST** add Mentor to transaction as Co-Agent
    - Mentee **MUST** submit docs to Mentor before uploading to PP
  - Give Mentee Task, Assignment, Tool and Education
    - First Task is to Read P&P Manual and any onboarding emails unread
    - First Assignment is to begin recording Sphere of 100 w/@ least 1 ave of Contact

## Mentor Program

- Record Sphere in Notebook, Spreadsheet, CRM
  - Due by 3<sup>rd</sup> Meeting
  - First Tool is Paperless Pipeline
  - First Education is Orientation & Paperless Pipeline CE Class
  - Set next meeting to be approx. 1 week away
  - Fill out Meeting Record and copy for Agent
- Meeting #2
- What has Mentee been doing to get business?
  - What questions or concerns does Mentee have?
  - Check progress on Sphere of 100
  - Task: Search Real Estate Intro Letter & start writing one
  - Assignment: Continue working on Sphere of 100
  - Tool: Mentor decides based on meeting content
  - Education: Mentor decides based on needed classes
- Meeting #3
- Sphere of 100 w/@ least one ave of contact COMPLETED
  - Introduction Letter written, proof it, make suggestions
  - Answer questions and address concerns
  - Task: Complete Intro Letter & Print if mailing
  - Assignment: Send Intro letter to Sphere of 100
  - Tool: CRM (if applicable) of Mentor Chooses
  - Education: Chosen by Mentor
- Subsequent Meetings
- After meeting #3, Schedule on an As-Needed basis
  - Allow Mentee to ask any RE questions or discuss issues since prior meeting
  - Go over any contract(s), contingency dates, contract checklists
    - Discuss potential compliance & contract issues with Mentee
  - Discuss previous meeting Tool, Assignment, Task, Education
  - Go over Mentee Checklist & check off completed items
  - Allow time for Agent questions / discussion
  - “Do you have q’s about anything RE related we haven’t covered?”
  - Set next meeting and TATE