THEWORKMANWAY

PLAYBOOK

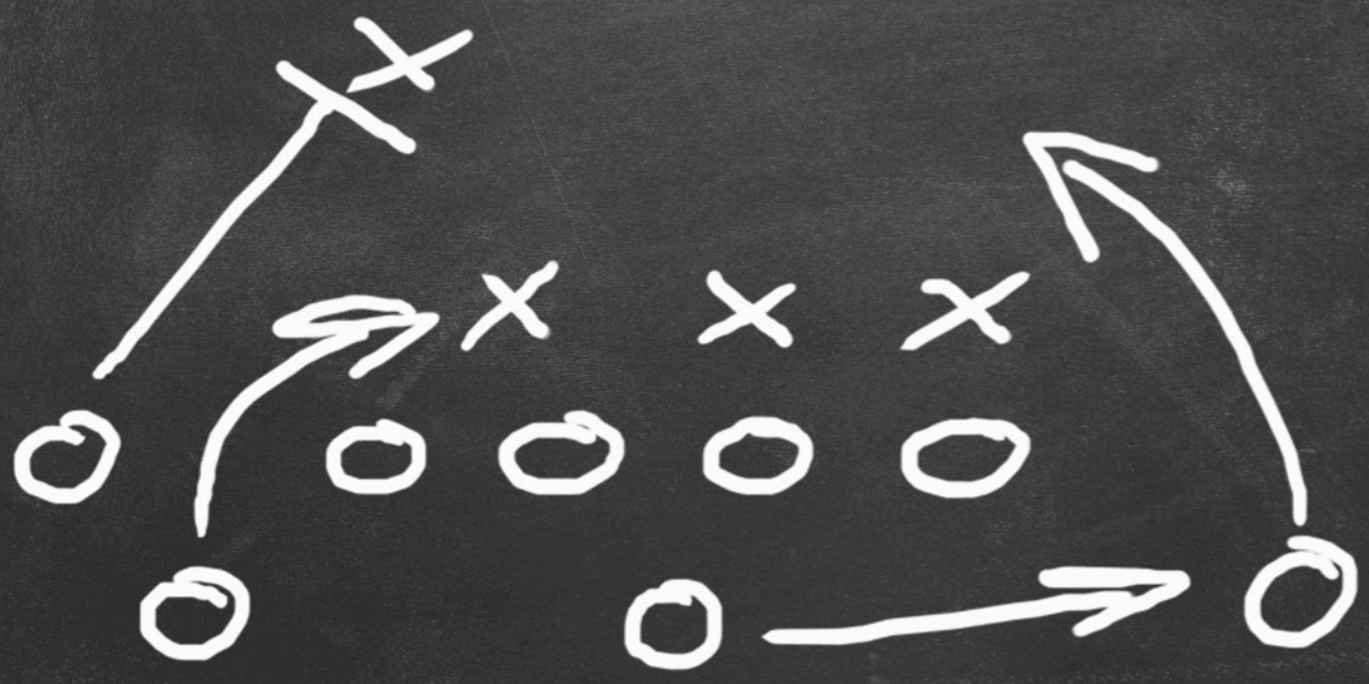

Table of Contents

Before You Get A Client 4

I'm a New Coach, Now What? 4

Tracking Your Coaching Requirements — Workbench 4

Coach Resource Documents 6

The Workman Success Systems Training Center 6

Set Up For Coaching Success 7

Organize Your Coaching Environment 7

Establishing Your WSS Email & Signature 8

Using Zoom.us 9

Practicing The Workman Way 11

Navigating Workbench for Coaching Calls 11

Reviewing the Client Snapshot 11

Client Contact Information 12

Coaching Notes 12

Coaching "To-Dos" 14

Accessing Client Documents/Trackers & Recordings 15

Adding or Removing Team Members 15

Client Business Numbers 16

Client Success Habits 16

Client Recent Activity 17

Posting a Private Client Message in Workbench 17

Resource Library 18

Sharing Documents with your Client 18

S.N.A.C. T.O.A.D…. What's that? 19

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Getting Your First Client 21
Finishing Coach Requirements 21
How Are Clients Assigned? 21
Determining Your Coaching Schedule 22
When Should I Contact My Client? 23
What Do I Talk About on the Introduction Call? 23
What Do I Talk About on Future Calls? 24
What if I Don't Have the Answers? 24
Moving Forward: Ongoing Calls & Communication 26
Sending Coaching Call Reminders 26
Getting Ready for Your Call 26
Coaching Session Completion Form (CSC) 27
Additional Training 28
Hosting a Role-play Call 28
A Few Critical Thoughts 29

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Before You Get A Client

I'M A NEW COACH, NOW WHAT?

You've signed your contract and are ready to start the training process to become a Certified Workman Success Systems Coach. What does that include?

All Workman Success System Coaches are required to complete a comprehensive training program consisting of, but not limited to, online training content, live/in-person coach training and regular, ongoing live webinar participation as part of the on-boarding process. The specific task list of what needs to be completed prior to becoming certified and receiving your first client is located in WorkBench.

Your WorkBench portal houses a checklist of tasks that you must complete before you become certified and can receive your first client. Your training can go as quickly as you'd like, depending on how committed you are to completing the assignments. Rest assured, ALL Workman coaches have completed this same training — it's "The Workman Way".

This Coaching Operations Playbook will provide you with an overview of the Workman Success Systems' on-boarding process for coaches. Links to videos that demonstrate the majority of "how to's" are found in two places: 1) throughout this document and 2) in the Workman Success Systems Training Center under the tab labeled "Coach On-boarding".

TRACKING YOUR COACHING REQUIREMENTS — WORKBENCH

Workbench is a customized platform built exclusively for Workman Success Systems' coaches and clients. This platform allows the coach and the company to communicate, manage and track a client's progress throughout coaching. You will also use WorkBench to track your own progress as you complete your training to become a Certified Workman Success Systems' coach.

Your personal login information for WorkBench has been emailed to you. If you did not receive it, please reach out to Coach@WorkmanSuccess.com and request it be resent. The website URL is www.wssworkbench.com. Please BOOKMARK this page for future reference.

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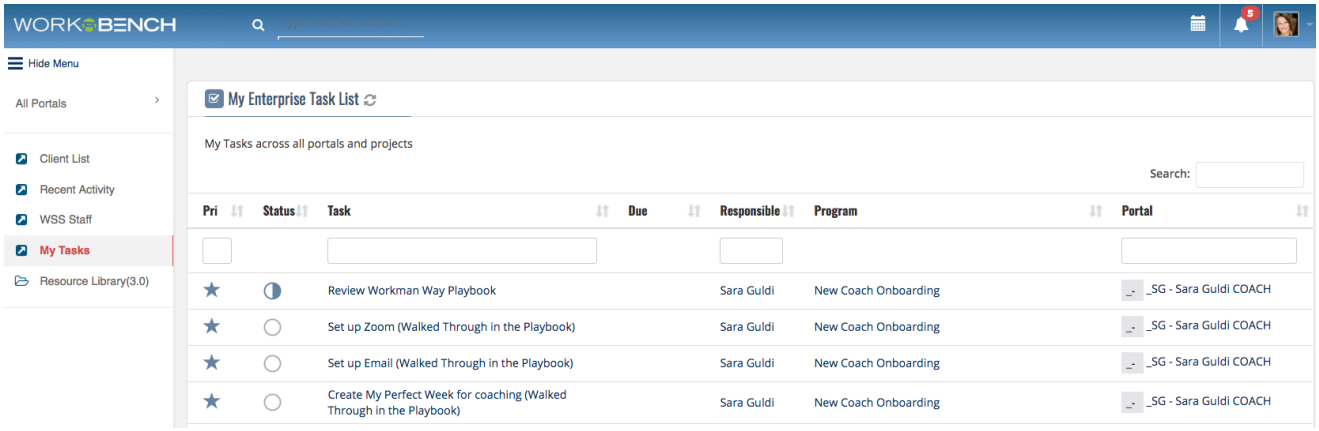
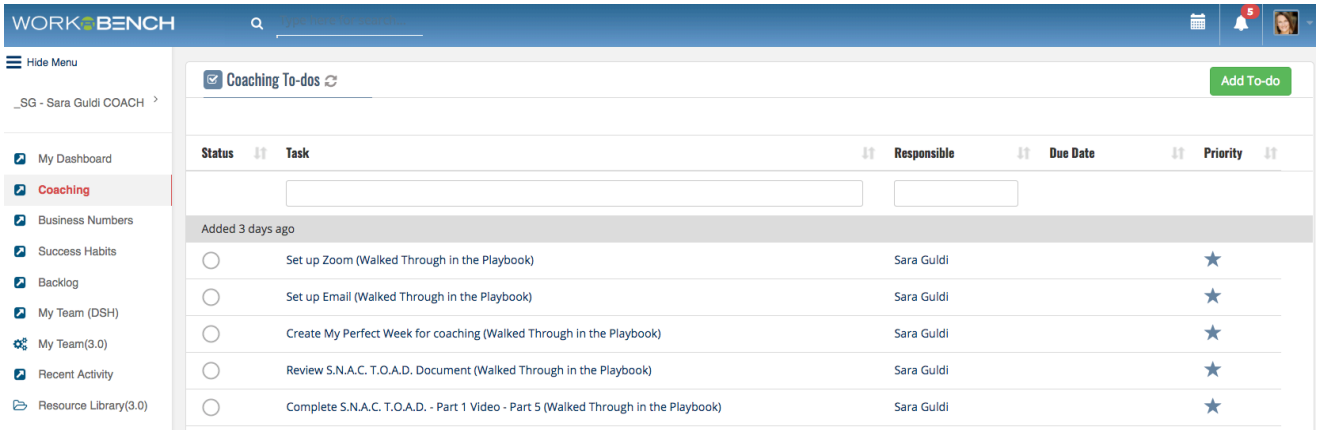
To begin your training, login to WorkBench and review the tasks assigned to you. Make sure you check things off as you complete them — this will help us monitor your progress and let us know when you are ready to receive your first client. You will find the checklist outlining the steps to become a Certified Workman Success Systems Coach in WorkBench under Coaching "My Tasks" or under "Coaching To-dos".





Learning to navigate within WorkBench is one of the most important things to master. As a coach, you will have the opportunity to truly impact the lives of your clients. Knowing where all of the tools are located in WorkBench is imperative so that when you have calls with your clients, you aren't slowed down by the technology or lack of knowledge where the documents are located. The client needs to know and we expect that you have a solid understanding of the tools you are asking them to use.

THE BASICS…

- Logging in - VIDEO
- Overview of main screen - VIDEO
- Accessing your Coaching Requirements and "My Tasks" items - VIDEO

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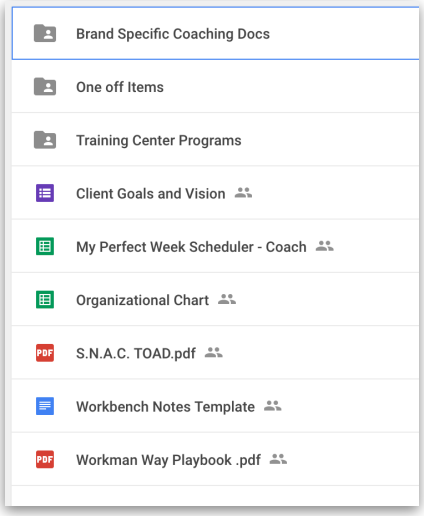
COACH RESOURCE DOCUMENTS

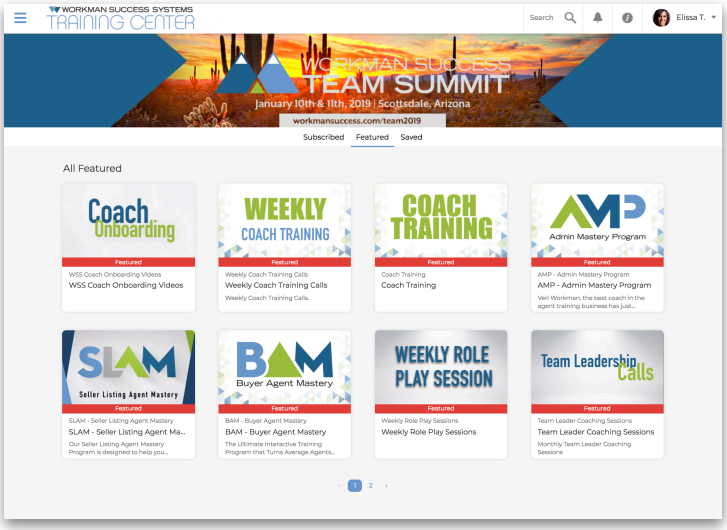
As a new Workman Success Systems Certified Coach, you will have access to many additional resources and documents to assist you and your clients. Click HERE to go directly to the folder on Google Drive which houses S.N.A.C.TOAD, an e-version of this playbook, the template for My Coaching Week and more.



2. WSS Coaching Resources (for coaches)

THE WORKMAN SUCCESS SYSTEMS TRAINING CENTER

You will receive a link to the training center as well as your login information via email. It can also be accessed at www.workmansuccess.com/trainingcenter. Please **BOOKMARK** this page for future logins.



The Workman Success Systems Training Center is the hub for all of our original content programs and training videos, including BAM, AMP and SLAM, recordings of past coach training events, past webinars, Workman Wisdom, recorded Role Play calls, Team Leader calls, Workman Success Systems Client On-boarding Series and Workman Success Systems Coach On-boarding Series. The training center houses much of the content you'll need to complete in order to be a coach as well as content for our clients and their teams. Because you will have already completed these programs during your training, assisting your clients when it's their turn to navigate the training center should be no problem. Additionally, your access to the training center will give you the ability to keep track of what videos your clients have completed and hold them accountable during coaching.

- Viewing what your clients have completed in the training center - VIDEO

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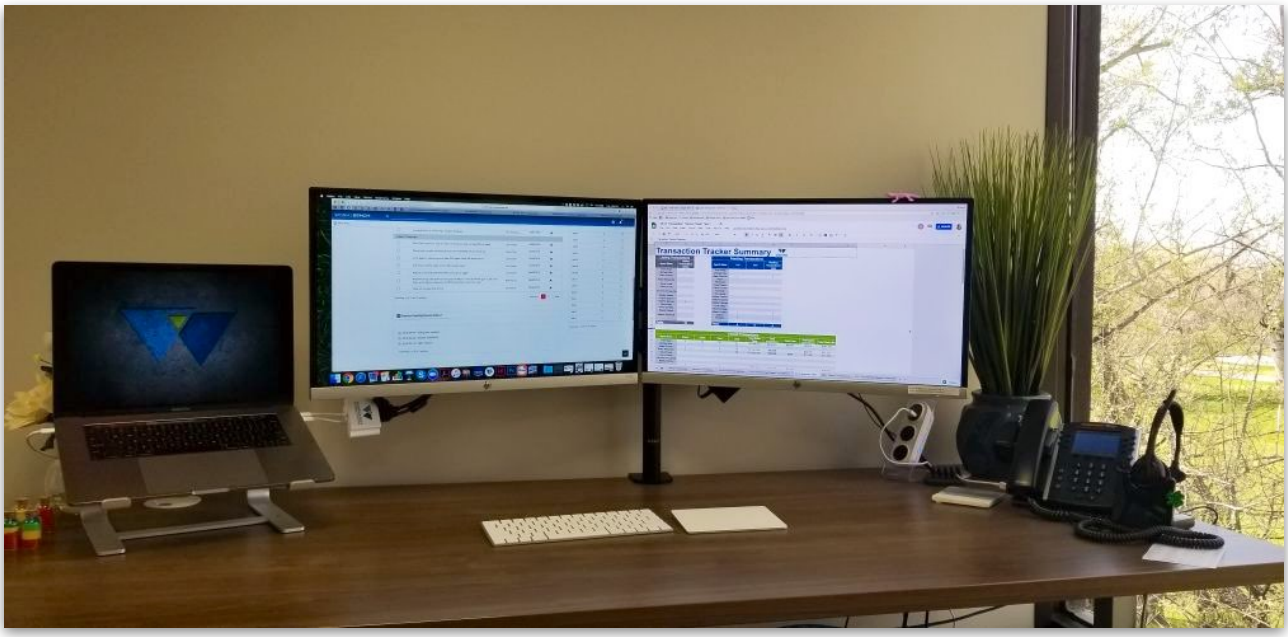
Set Up For Coaching Success

ORGANIZE YOUR COACHING ENVIRONMENT

A successful coaching call begins with the right environment. Every call with a client is recorded on Zoom.us with audio and video so setting yourself up for success from the beginning is important. Make sure you have collected the following equipment before you start coaching with any clients. More importantly, be sure you can operate all of it! It's important to make the right first impression. Non-working technology or equipment may start you off on the wrong foot. Feel free to call the Client Care Team to test your gear before your first call!



What you need for every call:

- **Computer** - This is a non-negotiable — you must to be at your computer during the call and not trying to dial in from your phone. This will give you the ability to login to your client's WorkBench and go through their agile, trackers, etc in real time for real accountability.
- **Camera/Webcam** - Included with or attached to your computer — make sure you haven't disabled a setting prior to using it. You will use your camera with the Zoom.us app. Using video on a call establishes a greater connection with your client than just using voice — you are also able to see the level of engagement from your client during the call.

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- **Headset** - Helps to eliminate background noise and office conversations for both you and your client. We like this model. However, noise cancelling earbuds will also work.
- **2 Monitors** - Most coaches use two monitors so they are able to see the client documents or trackers in real time while on the phone. The second monitor can be open to the client's WorkBench portal to review numbers or documents. This is much simpler and cleaner than trying to flip from one webpage to another. We like these.
- **Quiet Environment** - This is crucial! You'll need a quiet environment away from any distractions. Your client deserves your undivided attention during their call. Turn off your phone, close your email, find a space in your office or home that is free from distractors.

ESTABLISHING YOUR WSS EMAIL & SIGNATURE

A consistent brand and signature, regardless of what state or company from which we are coaching, is an important component of our branding. Continuity throughout all communication gives clients security in knowing that we are all part of the same team. All coaches must use a Workman Success Systems email for communication or limit communication with clients to WorkBench.

We will provide you with a Workman Success Systems' email that can be forwarded to your preferred email provider. Once you receive the information for your email, set up your new email account to send email as your Workman Success Systems email and add your signature.

- Setting up your email to send as Workman Success Systems email (Gmail & iMail)
- Setting up your Workman Success Systems email signature (Gmail & iMail)

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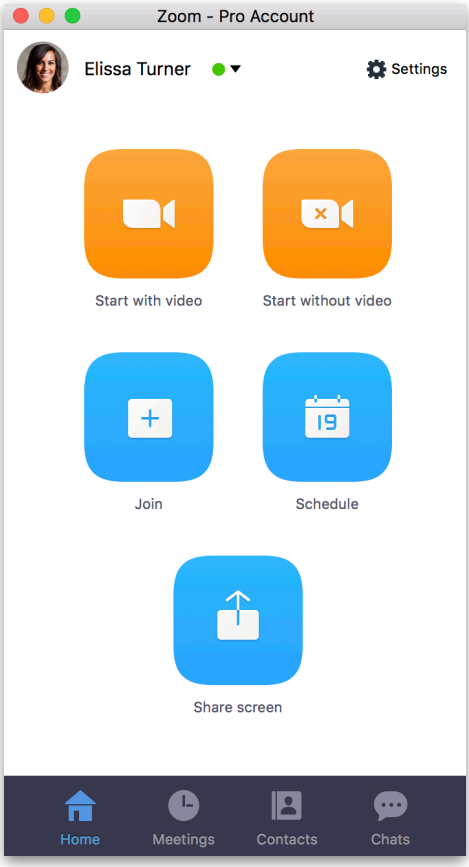
USING ZOOM.US

All coaching calls must be conducted using your personal Workman Success Systems Zoom.us account. Zoom gives the coach the ability to record the calls as well as see the client and engage with them "face to face" during the call. Zoom also allows the coach to easily share their screen or view the client's screen. Again, this feature provides a higher level of accountability and connectivity with the client. Once recorded, the call is uploaded to the client's WorkBench for their convenience. If they ever feel the need to review or re-listen to the call, it is clearly labeled with their name and the date of the call.

There is a difference between attending a meeting as a participant and actually hosting the meeting using Zoom. By now, you have attended at least one, but possibly more, Friday Coaching Calls using Zoom. As a host, the login is slightly different. Please make sure your Zoom account is set up well before you actually need to use it for the first time with a client. As always, feel free to test this out with the Client Care Team.

Setting Up Your Zoom Account

- Workman Zoom page: https://workmansuccess.Zoom.us/
  Please **BOOKMARK** this page for future logins.
- Download Client Manager on desktop & online
  - Download to your desktop - Zoom.us/download
  - Download online - Chrome Add-On - VIDEO



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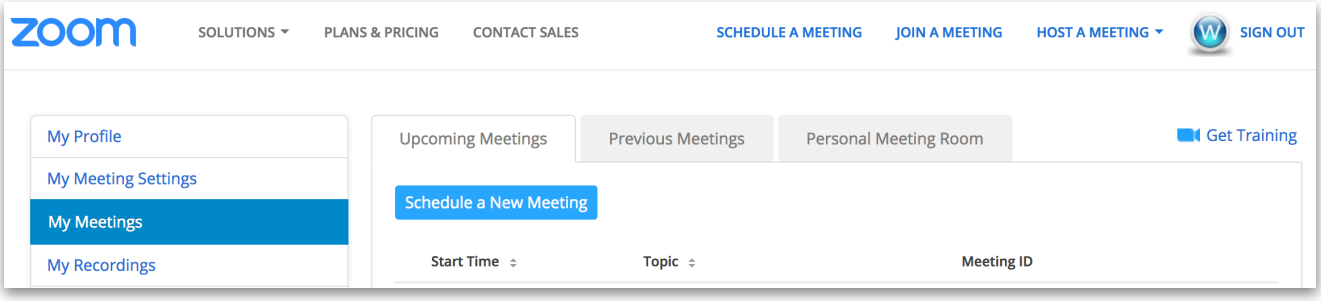
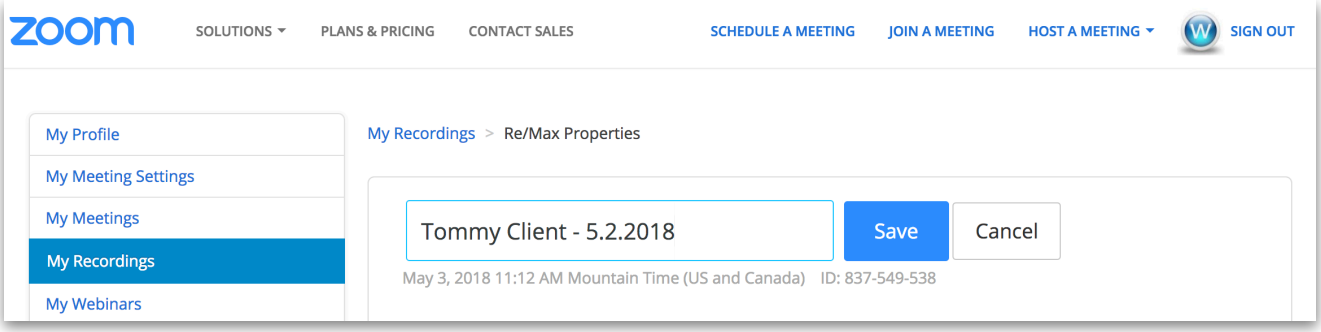
Once Zoom is installed on your computer, you are one step closer to scheduling and hosting your first coaching call. As noted previously, setting the same day and time every other week with your clients is the "Workman Way" to manage your calls and schedule. Once you and your client have agreed to a day of the week and time, add it to your calendar, set it to recur every two weeks and set up the Zoom call. Make sure you know how to send your client an invitation to the meeting. Use the recurring meeting button to schedule the call to recur every two weeks.

- Zoom Scheduling Meetings - VIDEO
- Zoom Recurring Meetings - ARTICLE



Once your call is complete, it will be need to be uploaded to your client's WorkBench. In order to allow the VA to find the call and put it in the correct portal, it needs to be labeled or renamed in the following manner: "Tommy Client - 5.2.2018"

- Labeling your Zoom Meetings - VIDEO



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Practicing The Workman Way

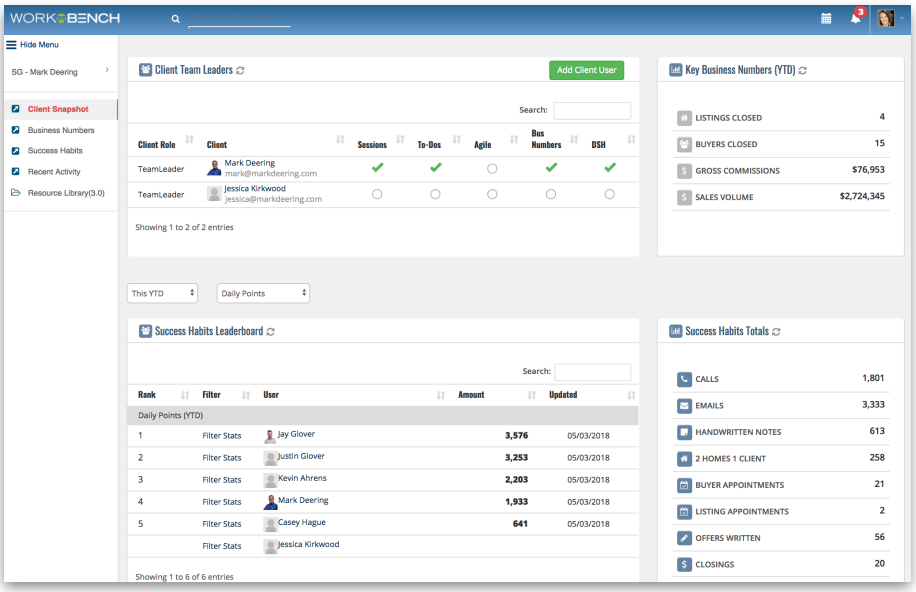
All new coaches will be given access to the same practice client on WorkBench in order to navigate all of the following categories using actual data in the system. It is critical that you are familiar with each of the following topics and have taken the time to watch the video or call the Client Care team for assistance if necessary prior to your first actual coaching call. The practice client will have all of the following topics pre-loaded in WorkBench for your continued training process.

NAVIGATING WORKBENCH FOR COACHING CALLS

REVIEWING THE CLIENT SNAPSHOT

Your client's WorkBench is the hub for all activity and the Client Snapshot is the one location where the coach is able to view all activity from the client and team members. Take the time prior to your scheduled call to review the Client Snapshot. In this one location, the coach is able to see what agents and team members are completing their Daily Success Habits, if the client has completed and checked off any of their To-Do's, How the YTD Key Business Numbers are looking and the overall Success Habits Totals for the team.

If your client is not inputting this information into WorkBench on a regular basis, it's YOUR responsibility to hold them accountable and teach them the WHY for this tool. Over time, this page will be a huge measure of their success. Start the habit from day 1..call 1.



- Reviewing the client snapshot — VIDEO

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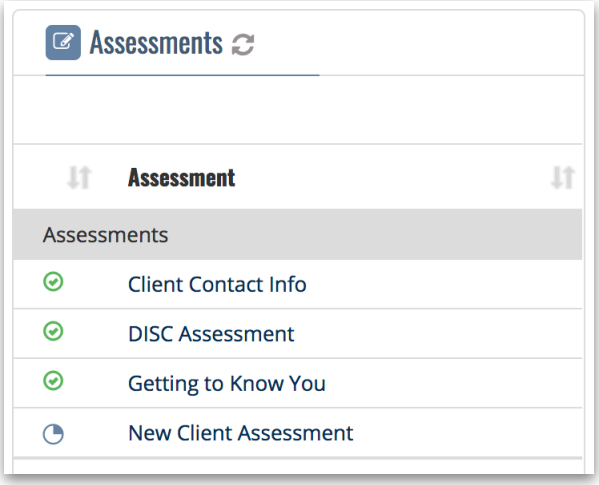
CLIENT CONTACT INFORMATION

Coaching is a relationship. Your client trusts you and is looking to you for guidance, accountability and structure. At the same time, you may develop a close, personal relationship with your clients through coaching. The information on the individual client page under Assessments will assist you in getting to know your clients on a more personal level. This information includes their DISC style, contact information, a Getting to Know You page with likes and dislikes (in case you want to send a gift!) and the New Client Assessment. All of these documents together will help to create a broader picture of your client to deepen your coaching relationship.



- Client Contact Information, New Client Assessment, etc - VIDEO

COACHING NOTES

There are two styles to note taking: those who are able to take notes while on the coaching call, directly into WorkBench and those that need to hand write them on paper and then transcribe it into WorkBench. While the preferred method would be to take notes directly into WorkBench during the call, we understand that that method may not work for everyone. If you choose to take notes outside of WorkBench, the following standard applies: We expect coaching notes to be uploaded to WorkBench on the same day as your call. Notes provide immediate reinforcement and a reminder to your client to continue to work on their business. Your role as the coach is to maintain a high level of accountability as well — and the notes are a key tool in this relationship. Waiting several days to input notes suggests not only that you were too busy to complete your task but may also run the risk of forgetting key elements discussed on the call. Make it a habit right away to input your notes immediately.

- Adding Coaching Session Notes - VIDEO

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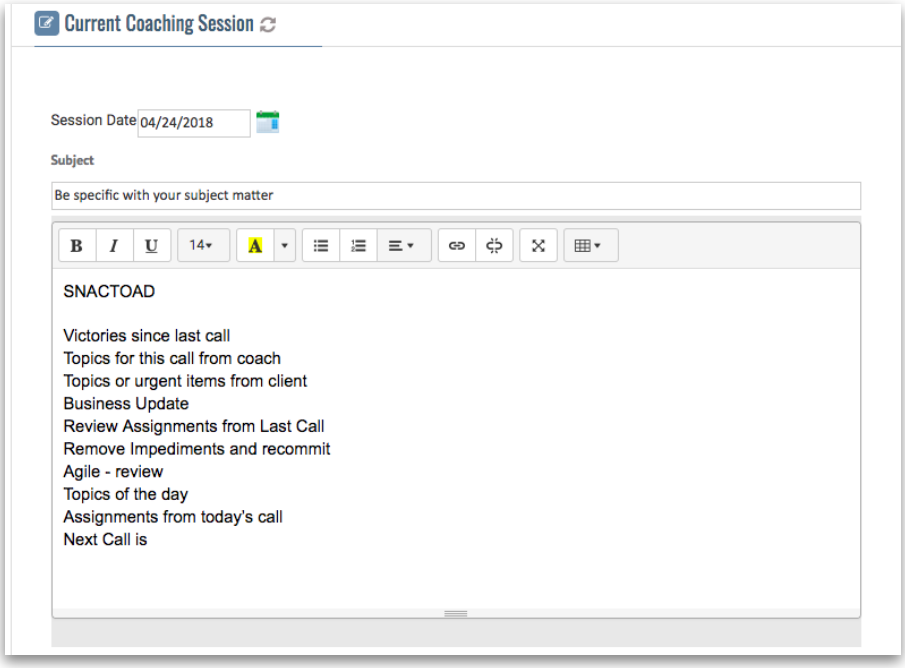
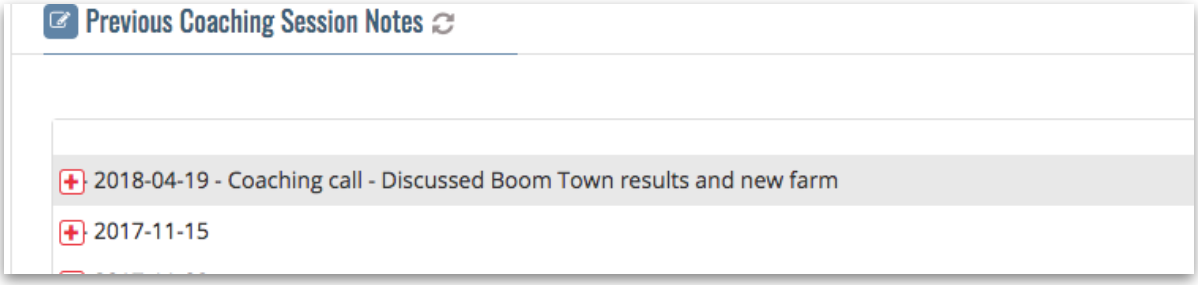
Whether you input your notes directly into WorkBench during the call or write them down and transcribe them after, all notes should be entered in WorkBench in the Coaching Session Notes section.

Label your notes in the Subject section after each call. Notes that are accurately labeled with the correct date and content for the call makes it much easier to find them later on. In the event that an issue arises with a client, Workman Success Systems can go back and review your notes to help resolve the problem. The clearer you are with your subject line, the easier it will be to locate the contents of that call and revisit your notes.



Once the notes are saved, they are automatically moved to the section below Coaching to-dos titled Previous Coaching Session Notes. Each link is clearly labeled with the date and content of the call.



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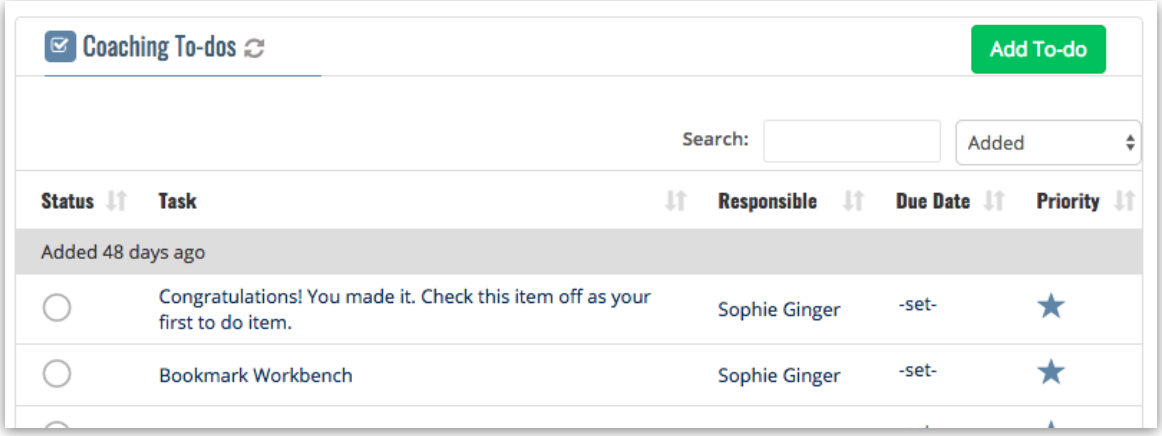
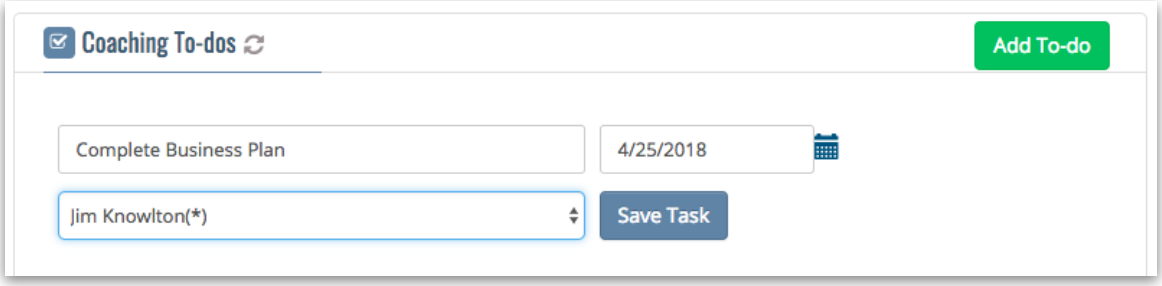
COACHING "TO-DOS"

One of the basic fundamentals of coaching with Workman Success Systems is assigning your client to-dos during and after every call. Additionally, you will start the next call by reviewing the previous assignments to ensure they are being completed. If the client does not appear have worked on the tasks, start them together and then ask for a commitment as to when they feel they can complete them. Set the expectation from the first call that will you be reviewing their past assignments and will hold them accountable for completing any overdue ones. To Do's are assigned to a specific person, either the client or a team member, and always includes a due date. Click Save Task and the to-do will automatically be added to the list.

See example:

- Creating Coaching Assignments and "To-dos" - VIDEO





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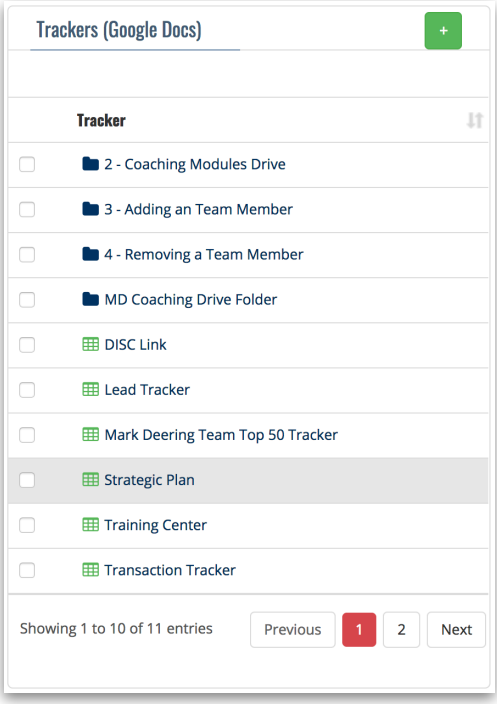
ACCESSING CLIENT DOCUMENTS/TRACKERS & RECORDINGS

As you progress with your client through their coaching journey, you will continue to encourage and require that they use the Workman Success Systems tools and systems to track their business and numbers. Some of the most powerful tools available to clients are the Lead and Transaction Trackers. Having your client input their leads into the tracker on a regular and ongoing basis will provide you with detailed data showing your client exactly where they should focus their marketing efforts. This location also houses the client agile and their strategic plan. These documents are key components of S.N.A.C. TOAD and must be reviewed on a regular basis with your client.

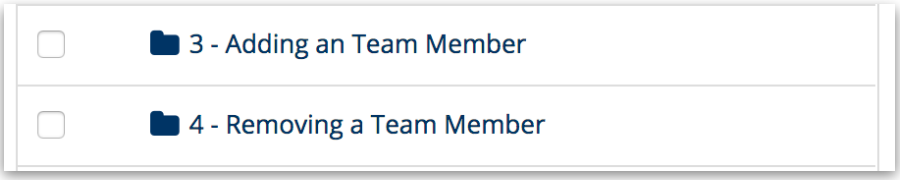


- Accessing and Finding Client Documents/Trackers & Recordings — VIDEO

ADDING OR REMOVING TEAM MEMBERS

Oftentimes, clients are looking to grow their teams and Workman Success Systems has the tools and resources to assist. Clients will want to add new team members to their WorkBench portal which provides an overview of agent activity and Daily Success Habits accountability. ***Please be sure your client is aware that if they give any team member or admin "Team Leader" status in order to enter data in WorkBench, this individual will have FULL ACCESS to all coaching notes and recorded videos. Only when they are labeled either "restricted" or "agent" will the Team Leader page remain private.*** If you are not sure how to assist your client with this topic, please reach out to the Client Care team for assistance.

- Adding and Removing a team member - VIDEO



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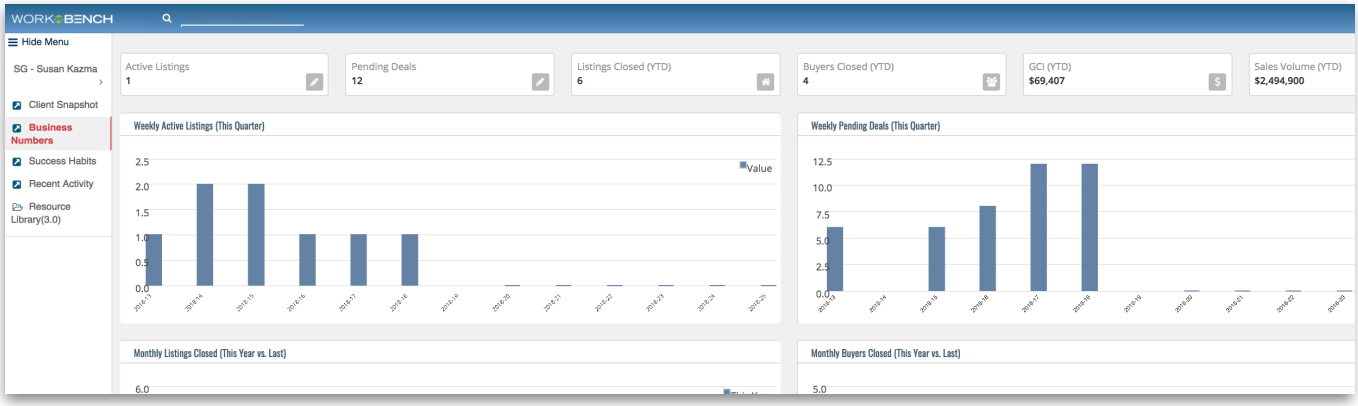
CLIENT BUSINESS NUMBERS

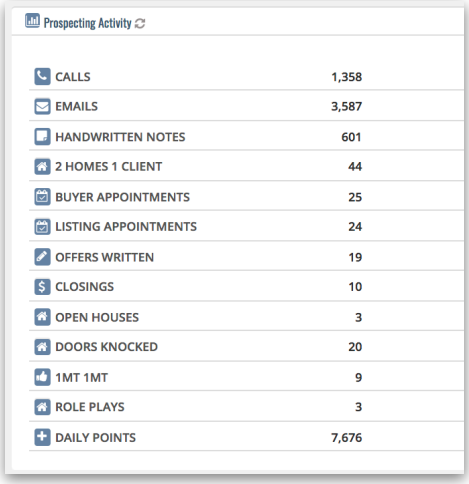
Reviewing the numbers with your client is critical not only to measure growth but to also quickly correct any downturn in their business. Knowing your numbers is key when owning and growing a business. Start every call with a quick review of the client's business numbers. Celebrate success!

- Reviewing the client Business Numbers — VIDEO



CLIENT SUCCESS HABITS

Your client and their team members will complete the Daily Success Habits points tracker in WorkBench every day, aiming for a daily total of 61 points. Get the commitment from your client from the very first call that these will be entered DAILY and you will review them on EVERY call. Committing to and fulfilling the required 61 points every day will generate new business and is a key component of "The Workman Way". If you feed your business correctly, ie. lead generate/DSH, it will grow. Reviewing the DSH and ensuring that the numbers are entered into the Success Habits on every call will also give you, your client and Workman Success Systems a clear matrix to determine measurable growth over time.



Prospecting Activity

CALLS	1,358
EMAILS	3,587
HANDWRITTEN NOTES	601
2 HOMES 1 CLIENT	44
BUYER APPOINTMENTS	25
LISTING APPOINTMENTS	24
OFFERS WRITTEN	19
CLOSINGS	10
OPEN HOUSES	3
DOORS KNOCKED	20
1MT 1MT	9
ROLE PLAYS	3
DAILY POINTS	7,676

- Reviewing the Success Habits — VIDEO

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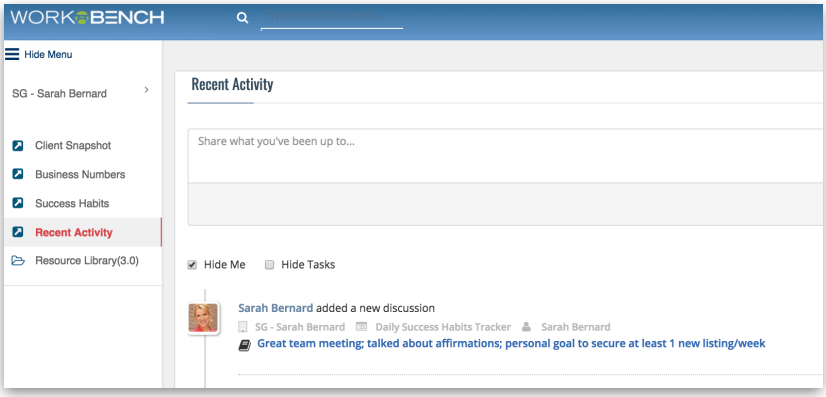
CLIENT RECENT ACTIVITY

Recent Activity is the location for ALL communication and WorkBench activity completed between you and your client. If your client has a team or admin, all activity generated by them will also appear in this section. It is critical to conduct client/coach quick conversations not by text or email but as “conversations” in recent activity as this section can be reviewed by the Client Success Team at Workman Success Systems. Training your client to use this space whenever they need you rather than sending an email will ensure that our team can jump in and help out if you are unavailable or unable to assist the client. It also helps us to track and understand what is going on with the client outside of the coaching calls. DISCs, resumes and other attachments will also go here and will be easily accessible and found if needed by either client or coach. This section centralizes and compartmentalizes any ongoing communication making it easier to find and retrieve any needed documents.

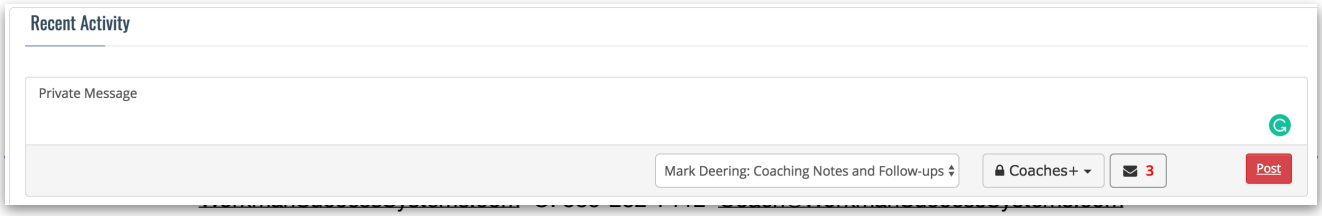


- Reviewing Client Recent Activity - VIDEO

POSTING A PRIVATE CLIENT MESSAGE IN WORKBENCH

Sometimes you may wish to contact your client and send them a private message that doesn’t include all the support team at WSS or the clients entire agent team. Use the private message feature in WorkBench under Recent Activity to conduct this conversation. Both the coach as well as the client have the ability to post messages privately to any Workman Success Client Care team member or any member of the client’s team. ***If you are having issues or concerns with your client, this is NOT where it should be posted unless you are absolutely certain the message has been deemed private.

- Posting a private client message in Workbench - VIDEO



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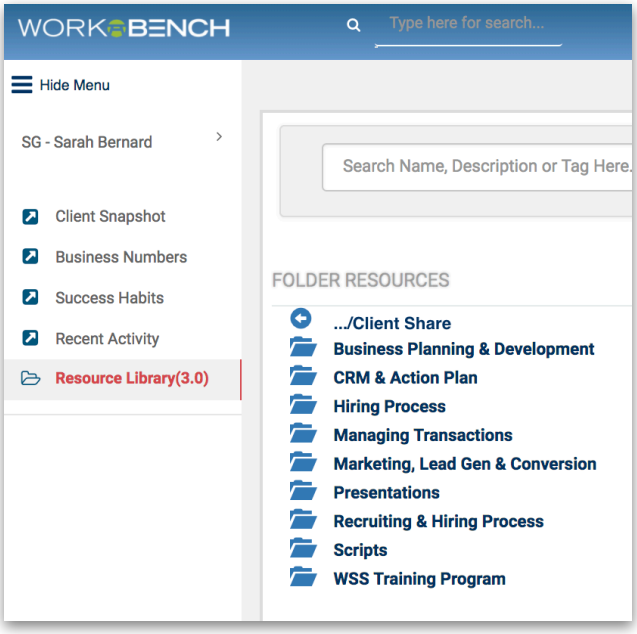
RESOURCE LIBRARY

Workman Success Systems has an extensive library of coaching modules available to assist you and your clients in every aspect of coaching including building a team, creating action plans, hiring agents as well as implementing the systems to make their business successful. Coaching modules can be accessed via WorkBench under “Resource Library”.

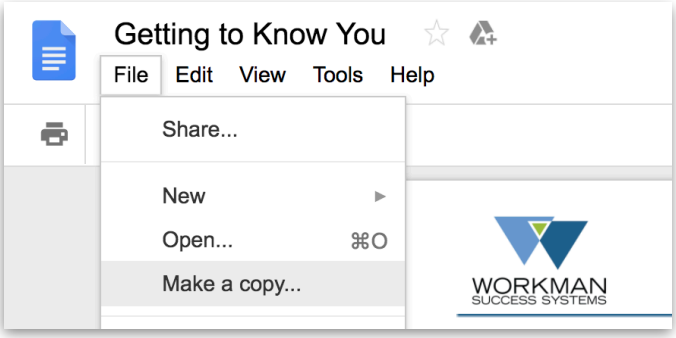
- Reviewing Resource Library — VIDEO



SHARING DOCUMENTS WITH YOUR CLIENT

Direct your clients to the “Resource Library” on their main page in WorkBench when they are in need of a particular document or resource. It is important that you are extremely familiar with these resources so you can assist them not only in locating the documents but knowing that such resources exist! Your client will need to make a copy of each document as they access it and save it as their own file. They need to have a google drive account attached to a gmail account to save and edit Workman Success Systems Documents.

- Making a copy of a Google Doc or Google Sheet - VIDEO



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S.N.A.C. T.O.A.D.... WHAT'S THAT?

S.N.A.C. TOAD is a comprehensive roadmap that outlines 12 Key Concepts to cover in the first 6 months of coaching. Each of the letters correlates to a concept or goal to be addressed with all clients as they start their coaching journey with Workman Success Systems.

WHAT IS S.N.A.C. T.O.A.D?

The content of SNAC TOAD is divided into 12 Key Concepts and has been formatted to accommodate approximately 12 coaching calls. It is expected that you will work your way through all 12 Key Concepts with each of your clients. The concepts are not necessarily in any particular order and can be completed as your client's needs are realized. However, it is The Workman Way to make sure that you have covered ALL 12 Key Concepts within the first 6 months of coaching.

After extensive research and feedback from coaches and current clients, Workman Success Systems discovered that coaching was most effective when our clients understand the basics at a very high level and thus are able to make measurable progress. We created this document to maintain a high level of accountability as well as encourage mastery of these essential topics. This gives all parties the ability to measure progress over time and document success. In essence, it is the roadmap to mastery.

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Key Concepts to Master in the First 12 Months

- New Client Assessment/-Strategic Plan
- Business Plan
- Agile
- Daily Success Habits Tracker (61 Points of Rhythm)
- 3-2-1s
- ABC's of Lead Follow Up
- Key Business Numbers
- Lead Tracker
- Transaction Tracker
- Top 50
- Build for Events (4 Contact SOI) - Client Appreciation events.
- AMP Scorecard and CRM

Each of the 12 Key Concept sections include:

- A detailed overview of the concept
- A section that establishes the why behind the concept
- Suggestions for deeper conversation and discussion
- Homework — for both the coach as well as the client

Following the methodology of the Key Concepts in S.N.A.C.TOAD is not a suggestion, it is The Workman Way. During each coaching call, we expect you to discuss and in some way address all 4 components of S.N.A.C. While our model is structured to accommodate all clients at whatever point they are in their business, Workman Success Systems believes that all clients will benefit from the guidelines presented in this document. S.N.A.C. TOAD LINK.

Video Training

- S.N.A.C. . T.O.A.D. - Part 1 VIDEO
- S.N.A.C. . T.O.A.D. - Part 2 VIDEO
- S.N.A.C. . T.O.A.D. - Part 3 VIDEO
- S.N.A.C. . T.O.A.D. - Part 4 VIDEO
- S.N.A.C. . T.O.A.D. - Part 5 VIDEO

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Getting Your First Client

FINISHING COACH REQUIREMENTS

As you progress through the “My Task” list in WorkBench, we will periodically check in with you to see how things are going. If, at any time during your training process, you have questions or comments about what you are doing or need to be doing, please reach out to the Client Care team and they will be happy to assist you.

Once your task list is completed, you will notice your final item will be to schedule a proficiency call to review your training and confirm you are ready to start taking clients. Upon satisfactory completion of these elements, a final interview is scheduled with the Director of Coaching who will then move you to the Active Coaching Roster and assign you a client!

HOW ARE CLIENTS ASSIGNED?

When a new client signs up for coaching, an email is sent to the Director of Coaching (among other key people) alerting him that we have a new client. It gives pertinent information about the client such as their coaching level, their business structure, their numbers and what their goal for coaching is over the next few years.

The Director of Coaching reaches out to the new client, welcomes them and schedules a Welcome Call. This call takes approximately 30-45 minutes and covers what to expect over the new week or two while the client is on-boarded into the Workman Success Systems Family. He also sets expectations about when they can expect a call from their new coach and when they should have their first call scheduled.
This call includes conversation about how or why they got into real estate in the first place, what their challenges are, what goals they have, what they do well and what they struggle with.

Following the welcome call, the Director of Coaching decides who he thinks will be the right fit for this new client. He takes into account the coaching level, how many clients a coach has, feedback from other clients and other relevant information about the coach.

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The Director of Coaching contacts the coach alerting her that he would like to assign her a new client. If he doesn't talk to you within a few hours of this contact, he moves on to his next choice for coach.

If you are interested in taking on new clients, call him back as soon as possible so he knows you are interested. Welcome call notes are put into the new client's WorkBench (for the coach's review) and a task is triggered to the Client Care team to assign the client to a coach in WorkBench and across all systems.

DETERMINING YOUR COACHING SCHEDULE

Coaching clients are contracted for two 30-minute calls per month with their coach. We always inform a new client that the calls are scheduled for 30 minutes but can last anywhere from 30 minutes to 45 minutes and most coaches block off a full hour, just in case. Scheduling your client for the same day at the same time every other week gives order to this process and keeps all parties on track. Set the schedule with your client on the first meeting and give the expectation that this is their regularly-scheduled call time going forward. Make every effort to keep this time for each call—limit changes to unexpected conflicts, never personal scheduling. Insist that they consider this time sacred as well—juggling schedules for multiple coaching clients every week is challenging at best. We recommend you encourage them to block out this time in their calendar every week—including the off-week—so that even when they are not having scheduled calls with their coach, they have built in time to work on coaching to do's and assignments. This also gives your schedules greater flexibility for future rescheduling.

Perfect Week Scheduler - Coach

	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Options
6:00								WSS Coach Task
6:30								Client 1
7:00								Client 2
7:30								Client 3
8:00								Client 4
8:30								Client 5
9:00		Client 1	Client 6	Client 11			Coach Trainng Call	Client 6
9:30							Coach Trainng Call	Client 7
10:00		Client 2	Client 7	Client 12				Client 8
10:30								Client 9
11:00		Client 3	Client 8	Client 13	Role Play Calls			Client 10
11:30					Role Play Calls			Client 11
12:00								Client 12
12:30								Client 13
1:00		Client 4	Client 9	Client 14				Client 14
1:30								Client 15
2:00		Client 5	Client 10	Client 15				Coach Trainng Call
2:30								Role Play Calls

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As a Workman Success Systems Certified Coach, you have access to the My Perfect Week Scheduler for Coaches (Document). This scheduler will assist you in creating a standardized time for coaching calls and set your weekly schedule with open time slots that are available for coaching clients. Please see the How to utilize My Perfect Week Scheduler when scheduling coaching calls.

- How to utilize My Perfect Week Scheduler for Coaching - VIDEO

WHEN SHOULD I CONTACT MY CLIENT?

Once a client is assigned to a coach, it is required that you contact your new client that same business day or first thing the next day if same day isn't possible. The client needs reassurance from you that the investment they just made in coaching is the right path to help them reach their goals. Welcome them to coaching, reiterate your support for helping them in their business and set a time for their first coaching call.

WHAT DO I TALK ABOUT ON THE INTRODUCTION CALL?

During the Introduction Call, follow the general guidelines on page 8 in S.N.A.C. TOAD to learn more about your client and help them to start to figure out their BIG WHY. Take time to dig deeper into what their goals are in coaching — reiterate your commitment to holding them accountable and providing guidance over the next few months/years.

Use the Introduction Call to discuss your coaching day availability and time that works for your both and schedule it. Set the expectation from the beginning that this time is "hard scheduled" and should be kept every week, regardless. Introduce Zoom and share the why behind its use. Indicate that you will send a reminder with the zoom call in information prior to the call but that they should mark it as recurring on their calendar regardless.

If their New Client Assessment is not yet completed, assign it for their first coaching call. Also suggest they start working on their Strategic Plan. Many of the details and goals needed to start the plan can be found in the the Welcome Call notes from the Director of Coaching. Point them in the right direction to get started on this important piece. You will be discussing it on the first call.

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WHAT DO I TALK ABOUT ON FUTURE CALLS?

Use S.N.A.C. TOAD as a roadmap to lay the foundation for every call. As you review the document, you will notice it's organized into 12 Key Concepts. These are the 12 items Workman Success Systems believes that all agents should know and be able to do at a very high level as a result of coaching with us.

Take the time to really read and understand what the 12 Key Concepts in S.N.A.C. TOAD are and WHY Workman Success Systems believes these are critical to laying a solid foundation in coaching. Although not listed in any particular order, following the path of S.N.A.C. TOAD will take you through at least your first 12 calls.

Have an outline or a plan for each coaching call to ensure your client is moving in the right direction.. Use this template to get started. Your goal is to keep your client moving forward and to hold them accountable. Don't be discouraged if you get derailed from the plan for your call. Redirect the client using their Strategic Plan and refocus the conversation to include the elements of S.N.A.C. TOAD. Take the time to listen to your client's urgent business needs but try not to get too caught up in the story.

Always review your notes from the last coaching call prior to each session with your clients as well as review your client's documents including their Key Business Numbers, Agile, Strategic Plan, trackers and DSH. This is the path to accountability. As their coach, they are counting on you to check in and make sure they are following through with the to do's you've assigned. Make sure YOU too are following through on anything you offered for your clients. Be prepared!

WHAT IF I DON'T HAVE THE ANSWERS?

If a solution is not within your "wheelhouse" of real estate knowledge, reach out to the whole coaching roster via "All Coaches Communication". This is a private group in Basecamp which can only be accessed by active Workman Success Systems' Coaches. Log in to Basecamp via www.workmansuccess.com/basecamp. Please **BOOKMARK** this page for future logins.

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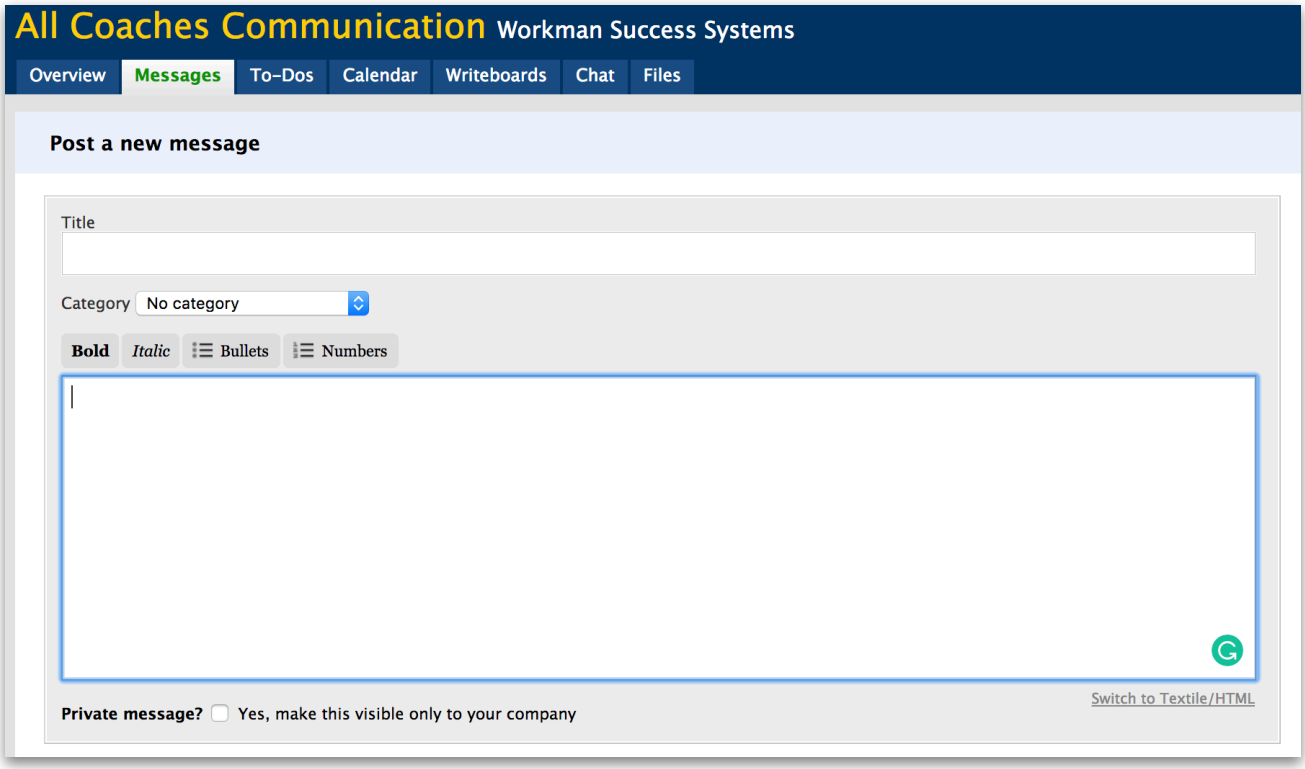
You will receive your login credentials once you have received your first client. There is an active link on the right hand side of the main page titled, "All Coaches Communication". Clicking on that project will direct you to a new page where you will be able to add a new message and it will be sent out to the entire roster of WSS Coaches.

- Logging into Basecamp - VIDEO
- Messaging in Basecamp "All Coach Communication" - VIDEO



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Moving Forward: Ongoing Calls & Communication

SENDING COACHING CALL REMINDERS

Send a reminder like this one week prior to your coaching call. This would be IN ADDITION to any automatic calendar reminders (ie. Google) and should to be sent manually in WorkBench to all of your clients. Use the Recent Activity section of WorkBench to send out reminders.

Send a second reminder the day before the call to confirm that your client hasn't made any scheduling changes. Again, this is in addition to any automatic reminders. This is a good way to touch base with your clients in between scheduled calls. Always put a note in WorkBench under Recent Activity, especially if it's a topic or issue that might need assistance from others or a quick look from WSS Client Care Team before your scheduled call.

Coaching Email Template

Friday Before Coaching Week Reminder Email (Jim Knowlton)

Happy Friday!

Just your friendly Friday reminder that next week is a coaching week- on your normal day & time! I've attached the additional number reporting template to this email- please be sure to complete and upload into Workbench prior to your call, as well as entering in your business numbers into Workbench via the "business numbers" tab.

(Attached is an upload of the additional number template we have clients complete before call and upload into Workbench.)

GETTING READY FOR YOUR CALL

When preparing for an upcoming coaching call, you should access your client's WorkBench account and review their numbers. Set the expectation in advance with your client will they need to submit current and correct Key Business Numbers from their Google Drive Transaction Tracker at least a day or two prior to your scheduled call. They should upload their business numbers into the Business Numbers tracker in WorkBench. Review the last 3 or 4 coaching call notes and confirm the client has been working on both their To-Dos as well as in their Agile. As stated above, have a plan but make sure you take the time to listen to your client's Urgent Business Needs.

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COACHING SESSION COMPLETION FORM (CSC)

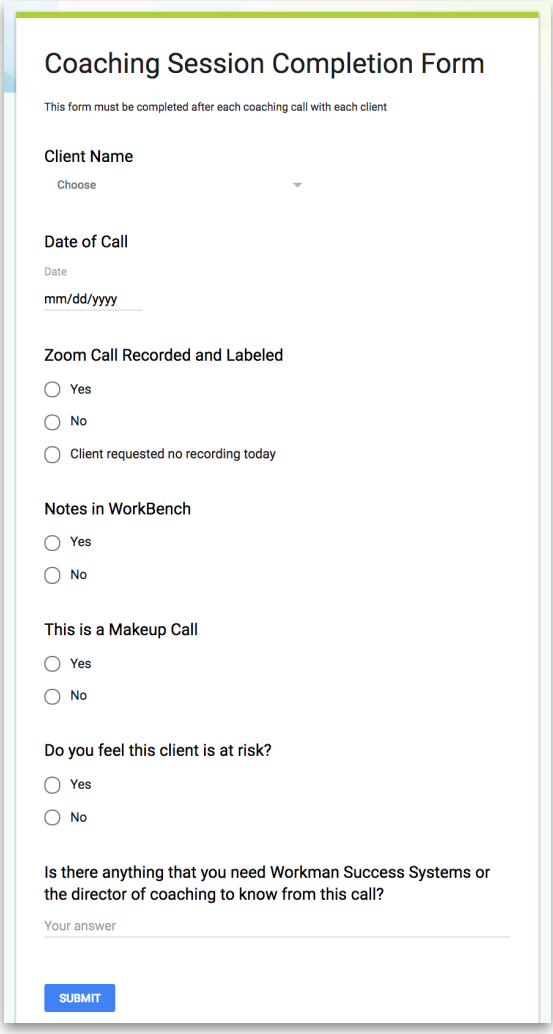
This form is designed to help the team at Workman Success Systems ensure that clients are receiving their contracted calls each month as well as confirming that coaches are being paid for those calls. In the same way we want our coaches to hold our clients accountable, WSS is holding the coaches accountable for the deliverable as well. Using this tracker on a regular basis will help Workman detect potential challenges or concerns with clients early so the support staff can be proactive and address the issues quickly. As we continue to grow and scale, this tracker will provide a system to effectively gather data from the field and connect coaching delivered against coach pay.

Once you have completed your call, renamed it in Zoom, uploaded your coaching notes to WorkBench and assigned the client some To-Dos, the final step is to complete the

Coaching Session Completion Form (CSC).

Your personalized Tracker will have a list of your clients in a drop down menu followed by a few simple questions. The Client Success team will email you a link to your tracker once you receive your first client. Bookmark this link to use after every coaching call. This link will NOT change.

- Each Coach will need to complete this online tracker for every client immediately after completing a coaching call.
- Make it a habit from the first call with your first client to open the tracker, click through the questions and click submit.
- The Tracker allows the team to determine when coaching calls do not occur and if there is a viable reason. Oftentimes, calls are not recorded or uploaded into WorkBench and when asked, the call did occur, it just wasn't recorded.


Coaching Session Completion Form

This form must be completed after each coaching call with each client

Client Name

Choose

Date of Call

Date

mm/dd/yyyy

Zoom Call Recorded and Labeled

- Yes
- No
- Client requested no recording today

Notes in WorkBench

- Yes
- No

This is a Makeup Call

- Yes
- No

Do you feel this client is at risk?

- Yes
- No

Is there anything that you need Workman Success Systems or the director of coaching to know from this call?

Your answer

SUBMIT

If you have not received your link or have misplace your link, please see links HERE.

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Additional Training

HOSTING A ROLE-PLAY CALL

As coaches you are required to host 1 roll play call per quarter. Here is a brief outline of the coaching calls. You will also be able to watch previous roll play calls HERE.

Start by welcoming everyone to the call and explaining that we are going to be shaking it up a little bit. Explain the new structure of the call. that it will be 10-15 minutes of 'coaching' on the theme 30 minutes of role play then 15 minutes of any questions that they have for you their coach of the week.

- Spend the first 10-15 minutes talking about the theme for the month.
- The goal here is to give our clients something that they can use. Reinforce the importance of the BAM program and coming to these calls, tie that into the theme.
- Introduce your guests (these should be two of your clients that will run through the role play call to give a great example of how it should go) Then ask for volunteers to do a role play.
- Finally, open the call up for questions. Maintain control of the content and the theme - this is not a forum for discussing difficult clients.

When you are hosting the Role Play call please be prepared with the following:

1. A coaching agenda that follows the theme for the month
2. Two clients, or buyers agents on your clients' teams or even your own team that can be the guest callers for the first role play. This is to encourage your own clients to be on the role play calls and to make that first role play a great one that people can learn from. Don't be afraid to throw a couple curve balls make it fun.
3. A few questions that you can ask and answer if no one has any.

You will be able to sign up to host your own role play call HERE.

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A Few Critical Thoughts

- Make sure we lead with revenue. Each coaching session should contain one or more dollar producing activities designed to continue the forward momentum with your client.
- Be clear on assignments and include dates as to when they need to be done. This is non-negotiable. Don't be vague - instill confidence and focus in your assignments.
- Drive the conversation and know our clients are looking for clear direction and focus. They don't need us to tell them to go figure it out themselves. It's okay to give a couple of options, then ask them which one they are willing to commit to.
- FOLLOW THROUGH - if you ask your client to have a task completed by a certain date, make sure you check in to see that its been done.
- Review assignments at the end of each call and have your client recommit to when it will be done. Check off those that are - celebrate the wins!

If you do these things, your clients will be happy and they will make clear and measurable progress. You will be well on your way to coaching success!

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