

Recruiting/Selecting—Your Skills, Systems and Processes in Place

Category	Tasks	Target Date	Check off Done	Notes
Recruiting Presentation Materials	a) Visual presentation customized with your bio, agents/testimonials, office info. b) Hand-out package for recruits c) Pre-first visit package d) 'Book of Greatness' in entry e) Web site customized to appeal to your targeted recruit			
Recruiting Plan	a) checked off between mgr/gm b) put on a recruiting calendar c) goals/how you'll measure results d) plan/system in contact mgmt.			
Agent database	a) created/updated			
Your agents enlisted in your plan	a) Agents trained/enlisted to refer b) Training calendar implemented c) Lead generation system encouraged d) Materials for agents to use in referring made and distributed			
Your Skill Development	Rate yourself 1-4 (4 is high) Interview questions—qualifying Probing—discovering real needs Interview process overall Telling your compelling story Objection handling Increasing the need Visual custom Presentation Closing	Rating		Action plan for improvement



For complete recruiting and interviewing processes and planners, see www.carlacross.com