

Success is a Choice Mentor Programme

Workshop Plan Module One Workshop Two

Target Group: New Entrants to the Mortgage Broking Industry	First three months
Module No/Workshop Series: Module 1/Workshop 2	
Learning Outcome: At the end of this Workshop, mentees should be able to: <ul style="list-style-type: none"><input type="checkbox"/> Understand Self efficacy<input type="checkbox"/> Understand Adult Learning styles<input type="checkbox"/> Understand the Pygmalion effect<input type="checkbox"/> Use questioning to create and interview<input type="checkbox"/> Set Business goals for next 7 and 30 days<input type="checkbox"/> Create a time management planner for a week<input type="checkbox"/> Complete Case study one<input type="checkbox"/> Close to or finish Certificate IV	
Assessment Criteria: as per Mentor Checklist <ul style="list-style-type: none"><input type="checkbox"/> Completed case study to industry standard<input type="checkbox"/> Completed Time Management Planner for One Week<input type="checkbox"/> Complete Learning Styles Questionnaire	

Resources:

Equipment: Data Projector, Whiteboard, Flip chart, laptops,

Guest Presenter options:

Expected Time:

5-6 hours including breaks

OHS

It is important for you as the mentor when you set up your training session to cover OHS.

You need to do this at the beginning of each session- you have a duty of care to anyone that you train to explain to them

- **Where the emergency exits are**
- **Where the toilets are**
- **What to do in an emergency**

You are also responsible for making sure that the learning environment is safe. So that means you don't conduct any of your sessions in any area that might be unsafe including the use of any resources that are not safe. E.g. Frayed electrical cords or extension cords running across the floor/trip hazards

Session

In this session you are going to be mainly looking at behaviours and what will make them successful. (or not)

It is important that they understand their particular “style”; as this will influence everything that they do with their sales activity and their customer contact. They won’t have their Credit Rep status as yet as they probably won’t have their Cert IV assessed yet. They will still be working on their assessments.

They will walk through each section with you. You do not need to be an expert, as it is written clearly for them (and you) to read and then create discussion. Make sure you have read the section or the exercise first as then it is easier for you to guide them through it.

In the section; You are in sales not finance, make sure that *you* have read through so that you can clearly send the message that we are in sales and not in finance. They need to be fishing for business every day.

Their weekly plan will help you to see where they are spending their time. This is so you can keep them on track. They should email you this on a Monday and then you review with them at the end of the week or the following Monday.

Make sure you allow about an hour to do the Honey and Mumford, as they need to select a style first then do the test to see what they really are. This is invaluable for you as a mentor, as if your styles are opposed, you will know what you need to do to help them along. Make sure that you know what your style is before you do this session.

Self-efficacy is easy to chat about and there is a good diagram in the module. Have them read through the section and then discuss various scenarios that could come up. For example what will they do when a valuation comes in low?

This is a classic example of how self-efficacy will affect the outcome.

Read through Pygmalion with them and discuss how names can create a picture in your head of a person. This is why some people keep away from naming their child a particular name as it reminds them of someone from their past

The day will be quite full with all of this and then complete it with Case study one. This will demonstrate to them all of the behavioural information that you have gone through as they will now show you their true styles when presented with the case study. Do they tackle it head on, or give up?

Each time that they show any frustration or giving up; you can refer to this learning and it will help you as mentor to guide them back on track.

Case study:

Have them read through and question you as to the path to take then they can spend some time researching it.

If they are not set up on your aggregator software as yet, then get them to look at the bank websites. Doing this will also show them how the customer does it and how frustrating it can be to go site to site. There are two case studies in each module and the mentee needs to tell you what research they have done so that you can see that they understand the process. So read through the scenario and the instructions and get the conversation started.

The case study is the last thing that is covered for the day so that it is easier to remember and they are not distracted by it earlier in the day. If you give it to them too early then they will be thinking about that and not the task you are working on.

Finish the session with goal setting and what the next session will be about. If you need to; schedule some one on

one time with those who need it

Always finish each session with goal setting and what are they going to Stop, Continue and Start doing. This is their opportunity to show you that they are growing and managing their own performance.

Notes:

Access templates as required from your Simply Mentoring USB

Time	Topic	Main Points/Activity	Resources
10am- 10.15	Welcome	Welcome them back and go over what the day's session will hold as above in your briefing. Remind them to turn phones to silent	
10.15-10.35	Record keeping	Get everyone to sign The attendance log (you create) Update where they are with their accreditations- (if they	Attendance log that you have created

		have started) enter into log	
	Checklists	<p>Go through the checklists for Module one and make sure they are on track to completing each item</p> <ul style="list-style-type: none"> • Discuss professionalism • Discuss why you are paid trail • Discuss 'negotiables' and non 'negotiables' in client contact. • e.g.: speed of returning all calls, level of literacy required in written communication; how emails should be 	End of Module one

		<p>constructed – no short sharp responses; how to make the customer feel like they are your only customer;</p> <p>It may seem simple however leave nothing to chance. Ensure that the new broker understands that they should ‘begin as they mean to end’</p> <p>If they want to end up as a professional, they should begin all activities as a professional</p>	
Break for a cuppa			
11am-11.30	Selling Financial Services	<p>You are in Sales Not Finance</p> <p>Refer to your train the mentor guide and work them through</p>	Their module and yours

		<ul style="list-style-type: none"> • Passion • Persistence • Discipline • Systems <p>Discuss each point in depth and discuss why some sales people are successful and others sit on the couch hoping business will come knocking. Perhaps they are strong in one area and need growth in another</p>	
11.30-12	Self-Efficacy	Read through this section and discuss how they need to have high self-efficacy (HSE) to succeed in sales.	Their manual and yours

		<p>People with HSE are less stressed because they are solutions focused. They are the ones that will find the carpark when everyone is doing laps of the carpark. They look for opportunities and take them. Very little gets past them. They of course will annoy you (in a good way) because they are so focused BUT why would you want a lazy 'excuse making' worker. Refer to the diagram in the module and question them as to when they have solved a problem by sticking at it and becoming solutions focused</p>	
	Pygmalion	Read through this and ask	

		<p>them if they can remember a good teacher and a bad teacher from school.</p> <p>Discuss if they have ever played a sport after or before a sibling and the coach or even the parents have commented positively or negatively. How you see someone is how you will treat them. So if you see someone as a good sports person that is how you will treat them. If you think that someone can't catch a ball, you will likely to alter the way you throw it to them, so that they will catch the ball. The same goes in business. How you see</p>	
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		<p>someone will determine what tasks you give them. If you think someone won't be any good with your high net worth clients, you probably won't refer them to that broker. If someone is loud, you may avoid them. If someone is too quiet, you may also avoid them, Pygmalion is about beliefs and how you see things is how you will treat them.</p>	
12 noon lunch Break		<p>Get them to change their outgoing message on their mobile phones to something industry relevant</p>	
12.30 – 1.30	Adult Learning Styles	<p>Get them to read the descriptions of the four</p>	<p>Honey and Mumford Questionnaire in your manual</p>

		<p>learning style and have them circle which one they feel that they are. Do not do the quiz yet. Read from the short descriptors in the session then do the quiz. It doesn't work as well if they only do the quiz. They choose what they THINK they are and then the quiz tells them what they are and then they have an "AHA" moment.</p> <p>Then get them to read through the instructions of the Honey and Mumford questionnaire and complete the task. Add up their score and see what the test reveals.</p> <p>Normally people get</p>	<p>and theirs</p>
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		<p>themselves wrong and select something different from how the test comes up with. Make sure that you give yourself an hour for this section</p>	
1.30-2pm	<p>Goal Setting Time Management</p>	<p>Review their immediate, 7 day and 30 day goals</p> <p>Get them to start thinking about where the business is going to come from.</p> <p>Get them to complete the template and the weekly plan</p>	Mentee Manual
2pm- 3.30	Case Study One	<p>Get your mentees to read through and to talk to you about what the scenario is about.</p> <p>Watch for any obvious errors in their questioning, however if they have a recommendation</p>	<p>Mentees to have their case study in the module</p> <p>Case Study one</p>

		<p>from their own knowledge and can back it up, then they are demonstrating that they understand the scenario. They need to use you as the customer or each other to practice their interviewing skills</p> <p>The case study is designed to get them “talking” and researching</p> <p>There are two in each module They all follow the same format. You are presented the information; they research the scenario and come back with three lenders that they can use. Give them time with you</p>	
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		to do a role play.	
3.30-4pm		<p>What are their expectations going forward for next three months</p> <p>What are your expectations (of yourself and your mentee) for next three months</p> <p>Quick review of the day and where do they need clarification of what was covered today</p> <p>What do they need to:</p> <p>Stop doing </p> <p>Start doing </p> <p>Continue doing </p>	

		Thank them for coming today Confirm date and times for next session End of session	
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