Success is a Choice Mentor Programme

Workshop Plan Module Six Workshop One

Target Group: New Entrants to the Mortgage Broking Industry
Module No/Workshop Series: Module 6 Workshop 1
Learning Outcome: At the end of this Workshop, mentees should be able to: ❑ Understand Cold Calling techniques ❑ Set Business goals for next 7 and 30 days using the short form review ❑ Create a time management planner for a week
Assessment Criteria: as per Mentor Checklist ❑ Completed Time Management Planner for One Week ❑ Completed Business Plan ongoing
Resources: **Equipment:** Data Projector, Whiteboard, Flip chart, laptops, **Guest Presenter options:**

Expected Time: 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** **This session is about cold calling. They have been broking now for 12 months so their confidence should be growing to try new things. You will read through the section and create role plays. The mentee will spend some time looking at areas that they can cold call in to create new business opportunities.**

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.

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.

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	
10.15-10.25	Record keeping	Get everyone to sign The attendance log (you create) Update where they are with their accreditations- (if they have started) enter into log	Attendance log that you have created
10.25- 10.45	Checklists	Go through the checklists for the Module and make sure	End of Module and beginning

		they are on track to completing each item 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 constructed – no short sharp responses; how to make the customer feel like they are your only customer; It may seem simple however leave nothing to chance. Ensure that the new broker understands that they should 'begin as they mean to end'	

		If they want to end up as a professional, they should begin all activities as a professional Read through the checklist for the module	
10.45am Break for a cuppa			
11-12 noon	Cold Calling	Read through the section and have them teach you about the key aspects of cold calling	
12 – 12.30	Role plays Cold calling	Choose one role play and have everyone have a go at it	
12.30 lunch break		Get them to change their outgoing message on their mobile phones to something industry relevant	
12.30 – 2pm	Task	Create a plan for 10 cold calls Have them look at areas that	

		they could stretch into and create a cold calling strategy	
2pm- 3pm	Guest Lender/s		Template lender cheat sheet
3pm Break for a cuppa			
3.15pm	Review Goal Setting Time Management	Review their immediate, 7 day and 30 day goals Get them to be always thinking about where the business is going to come from. Have them complete the template and the weekly plan This is a good time for them to plan the joint venture with another broker	Mentee Manual Template on USB and in their module
3.45	Goal setting /expectations	What are their expectations going forward What are your expectations	Module checklist double check on track

		(of yourself and your mentee) Quick review of the day and where do they need clarification of what was covered today What do they need to: Stop doing  Start doing  Continue doing  Thank them for coming today Confirm date and times for next session End of session	