

Success is a Choice Mentor Programme

Workshop Plan Module Seven Workshop One

Target Group:

New Entrants to the Mortgage Broking Industry

Module No/Workshop Series:

Module 7 Workshop 1

Learning Outcome: At the end of this Workshop, mentees should be able to:

- Review SMSF Structures
- Settlement process from the conveyancers view
- Create a time management planner for a week
- Commence Case Study 13

Assessment Criteria: as per Mentor Checklist

- Completed Time Management Planner for One Week
- Completed Business Plan ongoing
- Complete 20 point touch activity sheet

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 for you to read with them and discuss. Have your guest speaker come in and chat about SMSF lending. This will cement the learning.

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

		<p>they are on track to completing each item</p> <p>Discuss 'negotiables' and non 'negotiables' in client contact.</p> <ul style="list-style-type: none"> • 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; <p>It may seem simple however leave nothing to chance.</p> <p>Ensure that the new broker understands that they should 'begin as they mean to end'</p>	
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		<p>If they want to end up as a professional, they should begin all activities as a professional</p> <p>Read through the checklist for the module</p>	
10.45am Break for a cuppa			
11-12.30	SMSF	<p>Read through and create discussion. The section is very self explanatory</p>	<p>Modules and websites applicable</p>
12.30 lunch break		<p>Get them to change their outgoing message on their mobile phones to something industry relevant</p>	
12.30 – 1.30	The settlement process	<p>Have them read through the section. This is the best way to learn and after they have read through have them teach you about the process. Again</p>	<p>Their module</p>

		it is self explanatory so your role is to guide and create discussion. Not always is this covered in such depth, so it is a good read to create more depth in the overall process of our industry.	
1.30pm	Task 10 minutes	Complete the task How much have the earned in dollars, versus how much they had planned to earn How big is the gap both positively and negatively? Discuss strategies to get back on track for example the 50 ideas from previous session.	This is to see if the last time that they completed this exercise they did anything about the outcome.
1.40pm – 3pm	Guest Lender	SMSF	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
3.30	Case study 13	Read through and commence the research. They won't finish it but they can take away and bring back to you next session.	
3.55	Goal setting /expectations	What are their expectations going forward What are your expectations	Module checklist double check on track

		<p>(of yourself and your mentee)</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> <p>Thank them for coming today</p> <p>Confirm date and times for next session</p> <p>End of session</p>	
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