

# Success is a Choice Mentor Programme

## Workshop Plan Module Seven Workshop Three

**Target Group:**

New Entrants to the Mortgage Broking Industry

**Module No/Workshop Series:**

Module 7 Workshop 3

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

- Review all the learning in Module 7
- Complete both case studied 13 and 14

**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**

**The session is for you to consolidate. They should be struggling with case study 13 and 14 and you can use this session to help them to complete. Have them review the learning in this module from the start.**

**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 complete the case studies with you and this will help their confidence.

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



| <b>Time</b> | <b>Topic</b> | <b>Main Points/Activity</b>   | <b>Resources</b> |
|-------------|--------------|---|------------------|
| 10am- 10.15 | Welcome      | Welcome them back and go over what the day's session will hold as above in your briefing.<br>Remind them to turn phones |                  |

|              |                |  |                                      |
|--------------|----------------|--|--------------------------------------|
|              |                | to silent  |                                      |
| 10.15-10.25  | Record keeping | Get everyone to sign The attendance log (you create)<br>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 they are on track to completing each item<br>Discuss 'negotiables' and non 'negotiables' in client contact. <ul style="list-style-type: none"> <li>e.g.: speed of returning all calls, level of literacy required in written communication; how emails should be constructed – no short sharp responses; how</li> </ul> | End of Module and beginning          |

|                           |                   |   |                                 |
|---------------------------|-------------------|---|---------------------------------|
|                           |                   | <p>to make the customer feel like they are your only customer;</p> <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> <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 |                   |   |                                 |
| 11-130                    | Review the module | Have them read through and come to you with questions and discussion  | Modules and websites applicable |
| 12.00 lunch break         |                   |   |                                 |

|                       |  |   |  |
|-----------------------|--|---|--|
| 12.45 – 1.30          | As above Time to finish any module tasks | People work at different paces. Some will have finished and some will be struggling. This is a spacer so you can catch up. Time to complete any of the tasks and to show you any loans or scenarios. Stay in the room so that they stay on task and they can listen into any scenarios. | Their module   |
| 2pm                   | Case study 13 and 14                     | Read through and help them to complete; but don't do it for them  |  |
| 2.30                  | Guest Lender                             |   | Template lender cheat sheet                          |
| 3pm Break for a cuppa |  |   |  |
| 3.15pm                | Review Goal Setting<br>Time Management   | Review their immediate, 7 day and 30 day goals<br>Get them to be always   | Mentee Manual<br>Template on USB and in their module |

|      |                            |   |  |
|------|----------------------------|---|--|
|      |                            | <p>thinking about where the business is going to come from. Have them complete the template and the weekly plan</p> <p>This is a good time for them to plan the joint venture with another broker</p>   |  |
| 3.45 | Goal setting /expectations | <p>What are their expectations going forward</p> <p>What are your expectations (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> | Module checklist double check on track |

|  |  |  |  |
|--|--|--|--|
|  |  | <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> |  |
|--|--|--|--|