Team Leader Call Night Advice

1. Prepare team the week before by:
    a. Providing scripts and dialogue for overcoming objections
    b. Role play scripts and dialogues
    c. Make sure they know how to use their CRM to prepare “smart lists.”
    d. Get them excited! (you have to be excited as well)
2. Provide food and drink for the team on the call night…many times lender partners are happy to this.
3. Decide on music/motivational video to get team pumped up.
4. Create a fun contest…make sure everyone on the team has an opportunity to win, not just experienced agents…reward the right behavior.
5. Prepare a room/venue where the team can see and hear one another
6. Prepare a way for the team to easily track:
    a. Dials
    b. Contacts
    c. Appointments
    d. Lender referrals
    e. Any other data that is important to you
7. On call night
    a. Role play one hour before you start
    b. Ask every one what their goals are for number of appointments they want to set that night….have a board where each agent’s name is displayed along with their goals…also a place to record their results.
    c. Have a bell, buzzer, whistle…whatever…that they can come up and ring, blow…etc. when they set an appointment.
    d. Walk around the room, listen to their calls, offer coaching and encouragement when they hang up the phone. Interact with them…they will slow down about half-way through, so walk the room and keep them pumped up!!
8. After all calls are made, record each agents results on the board next to their name.
9. Calculate total potential sales volume based on the appointments set, calculate potential GCI based on appointments set.
10. Celebrate, award prizes!
11. Ask the agents what was the number 1 thing they learned that night