



## **TIER LEVELS**

EXPECTATIONS:	BRONZE LEVEL 1 0-3 CLOSED PER QUARTER	SILVER LEVEL 2 4-7 CLOSED PER QUARTER	<b>GOLD</b> LEVEL 3 8+ CLOSED PER QUARTER
1 on 1 Role Play	2 per Week	1 per Week	Optional
Weekly Team Trainings	2 per Week	1 per Week	Optional
Team Meeting	Required	Required	Required
10 conversations a day resulting in 1 self generated appt/week	Expected	Expected	Optional
Scoreboard Recording in Sisu	Daily + 9am Marco (Conversation number from previous day)	Weekly (updated by Monday)	Weekly (updated by Monday)
Asks for Referrals a Week	4 per Week	2 per Week	1 per Week
Open House	2 per Month	1 per Month	Optional
Maintain Sierra Tasks Below 48 Hours Past Due	Expected	Expected	Expected
Social Media Posts per Week Professional/Personal	2/2 Times Weekly	1/1 Times Weekly	Optional
Google Review per Week	3 per Week	2 per Week	For Each Closing
Events- Call, text templates, email templates to all PC/SOI	Expected	Expected	Expected

## **PERFORMANCE ADJUSTMENTS** (IF EXPECTATIONS UNMET WITHIN 30 DAYS OF IMPLEMENTATION)

ISA APPTS	NO	YES	YES
Amount of Monthly Mailers	20	35	50
Closing Gifts for your clients	All Closings	All Closings	All Closings
1 on 1 Coffee Budgets	20.00 Per Month	35.00 Per Month	50.00 Per Month
Pop By's	2 Team Pop By's Annually 20 Each Time	2 Team Pop By's Annually 35 Each Time	2 Team Pop By's Annually 50 Each Time
Lead Gen done with Accountability Partner	Yes	Νο	Νο
8:30 AM - 11:00 AM in the office daily	Yes	Yes	Yes