



Memo: The Pena Team Accountability System

Accountability is defined as owning and executing the responsibility assigned. This memo is to clarify and prioritize the team's system so every team member is accountable for executing Lead Generation.

Team Members **REQUIREMENTS**, per employment agreement 5a to 5c, as follows:

- **Lead Gen for 15 hours per week**
- **Make 150 contact attempts per week**
- **Turn in Lead Gen tracker every Thursday**

It is highly encouraged that you time block your 15 hours as 3 hours a day, preferably between 9 am and 12 noon Mountain Time.

Lead Gen Time Block **IS** calling, texting, emailing, or social media exchange with clients, vendors, and referral partners with the main goal of securing an appointment or referral and converting to an agency agreement.

Lead Gen Time Block **IS NOT** writing offers, calling title or lenders for under contract clients, writing amendments, or attending showings, inspections, repair calls, final walk throughs, and closings.

The following page is a newly implemented priority structure to help clarify and focus Lead Generation efforts.

Don't forget

Conversations ALWAYS have Documentation

Contacts ALWAYS have a Follow Up Task

Team Members **CONVERSION STANDARDS**, per employment agreement Addendum A, as follows:

- **2 meetings attended per week**
- **4 signed and executed agency agreements per month**
- **2 closed transactions per month (25 per year)**

Failure to meet or exceed the above REQUIREMENTS and CONVERSIONS STANDARDS triggers Substandard Performance. CONVERSION STANDARDS will be evaluated on a quarterly cycle.

Team Members **SUBSTANDARD PERFORMANCE**, per employment agreement Addendum A Section IX, results in the following consequences:

- **First Incomplete – Warning and Performance Evaluation with Tulio**
- **Second Incomplete – 1 day (24 hour) suspension from Paid Lead Sources**
- **Third Incomplete – 7 day suspension from Paid Lead Sources**
- **Habitual underperformance is indefinite lead suspension and membership evaluation**

Memo provided in writing via email and discussed verbally during team meeting on Mar 2, 2023.



*** Lead Generation with Intention ***

Hour 1
First 60 minutes of daily Lead Gen



Brand New HOT Leads
Sign Calls
Agent Referrals
Client Referrals
Real Geeks touch 1-3

Hour 2
Second 60 minutes of daily Lead Gen



Command Tasks
PROSPECTIVE Pipeline
Follow Up prior to Agency
Check MLS Portal
Confirm Meeting
Meeting Follow Up
Checking Preapprovals
Long Term Nurtures

Hour 3
Last 60 minutes of daily Lead Gen



Command Tasks
PAST CLIENTS
DTD2 Client Care Call
Client Appreciation Invites
Mailing Address & Birthdays
Anniversary 2+ years
Email & Mailer follow up
CMA offers
Military "veteran" check ins
Holiday Texts

Conversations ALWAYS have Documentation
Contacts ALWAYS have a Follow Up Task

- Set a timer on your phone
- If you finish before 60 mins, work on Real Geeks 4-8, circle prospecting, or Sphere of Influence (SOI)
- If you do not finish at the timer, document the last call, put a pin in that lead gen and move on to the next hour's priority. You will circle back the next day.