

Erik / Laura weekly 1-1 COPY

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TEAM LEAD DASHBOARD - ERIK (WEEKLY CHECK)

Hubspot - Activities by team member

Summary:

Next Steps:

Front - Team Lead Dashboard

Summary:

Next Steps:

Team activity totals - Advisor Assistants

Summary:

Next Steps:

Team activity totals - Advisors

Summary:

Next Steps:

Team activity totals - Mortgage

Summary:

Next Steps:

Tasks incomplete as of 1 day ago - assigned to all reps

Summary:

Next Steps:

NPS

Summary:

Next Steps:

Current priority deals by deal owner

Summary:

Next Steps:

CS 2023 Q3 OKRS

- OKR 1 - Continue to build on mortgage momentum**

Summary:

Next Steps:

- OKR 2 - Grow our advisor-assisted sales**

Summary:

Next Steps:

CLAIMS

- Review status of all ongoing claims**

Summary:

Next Steps:

TRICKY ONGOING CUSTOMER ISSUES

- Rebecca King**

Summary:

Next Steps:

RECRUITING AND PROMOTIONS

- Mortgage advisor**

Summary:

Next Steps:

- Bilingual advisor**

Summary:

Next Steps:

- Team Lead promotion**

Summary:

Next Steps:

- CAA hires**

Summary:

Next Steps:

LICENSING

- Check on licensing status of all current and recently onboarded staff**

Summary:

Next Steps:

ALL OTHER TOPICS

- Assigning work in Front - I think this gives you the best transparency into the day & best opportunity to coach your team. What would you need to change to open up your time to do this?**

Summary:

Next Steps:
