30-60-90 PLAN

Executive Assistant

When developing your new team member's 30-60-90 plan, focus on what the goal is and how you will measure the team member's achievements. Identify targets for the team member that will facilitate success in the role and on your team. Feel free to consult the job description and KWConnect tools for ideas. Focus on SMART goals:

- ✔ **Specific:** Clearly define what you are going to do.
- ✔ **Measureable:** Establish concrete criteria for measuring progress toward the attainment of each goal you set.
- ✔ **Achievable:** Goals should be challenging but a match to the knowledge and skills of the employee.
- ✔ **Repeatable:** The action or goal can be completed on a repeated basis.
- ✔ **Timely:** A commitment to a deadline helps a team focus their efforts on urgent tasks first.

30-Day Goals

- € Create email template to handle most frequent customer inquiries
- € Create a system for handling all financials and effectively communicate it to the team
- € Create system to manage buyers, sellers, lead generation, database management, and back-office support
- € Download Kelle

60-Day Goals

- € Own all financials and effectively communicate metrics to leader
- € Own and manage all systems for buyers, sellers, lead generation, database management, and back-office support
- € Handle all customer service inquiries within 24 hours

90-Day Goals

- € Update/Create operations manual that documents all systems and standards
- € Own and build a communications system for the lead agent
- € Oversee and ensure accurate execution of all contracts through closing

Team Member Name:	
Leader Name:	
30-Day Goals Completed:	
60-Day Goals Completed:	
90-Day Goals Completed:	

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