

30-60-90 PLAN

Operating Principal

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

- € Set the vision for market share and communicate with investment group
- € Set Four Conversations goals with the Team Leader and MCA
- € Hold the TL accountable to growing the Market Center at a 4:1 or better market share appointment to gross conversion ratio
- € Lead the TL and MCA to implement the systems, tools, and conversations of the Growth Initiative and the Career Growth Initiative to achieve profitability through growth and retention
- € Ensure the TL is holding the MCA accountable to weekly soft closes; review transmittal reports, including financials, prior to monthly transmittal
- € 100 percent participation in KWRI OP call
- € Download Kelle

60-Day Goals

- € In the weekly Four Conversations of the Growth Initiative, lead the TL and MCA to measure actual results against goals. Lead the team to adjust activities and strategies as needed to achieve goals.
- € Hold the TL accountable to growing the Market Center at a 4:1 or better market share appointment to gross conversion ratio
- € Lead the TL and MCA to implement the systems, tools, and conversations of the Growth Initiative and the Career Growth Initiative to achieve profitability through growth and retention
- € Ensure the TL is holding the MCA accountable to weekly soft closes; review transmittal reports, including financials, prior to monthly transmittal
- € 100 percent participation in KWRI OP call

90-Day Goals

- € In the weekly Four Conversations of the Growth Initiative, lead the TL and MCA to measure actual results against goals. Lead the team to adjust activities and strategies as needed to achieve goals.
- € Hold the TL accountable to growing the Market Center at a 4:1 or better market share appointment to gross conversion ratio
- € Lead the TL and MCA to implement the systems, tools, and conversations of the Growth Initiative and the Career Growth Initiative to achieve profitability through growth and retention
- € Ensure the TL is holding the MCA accountable to weekly soft closes; review transmittal reports, including financials, prior to monthly transmittal

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€ 100 percent participation in KWRI OP call

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