

# 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:

Want meeting notes like this with no extra work?

With Hypercontext by Spinach, every meeting has a shared

## CS 2023 Q3 OKRS

### ☐ OKR 1 - Continue to build on mortgage momentum

Summary:

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Next Steps:

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### ☐ OKR 2 - Grow our advisor-assisted sales

Summary:

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Next Steps:

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## CLAIMS

### ☐ Review status of all ongoing claims

Summary:

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Next Steps:

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## TRICKY ONGOING CUSTOMER ISSUES

### ☐ Rebecca King

Summary:

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Next Steps:

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## RECRUITING AND PROMOTIONS

### ☐ Mortgage advisor

Summary:

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Next Steps:

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### ☐ Bilingual advisor

Summary:

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Next Steps:

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### ☐ Team Lead promotion

Summary:

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Next Steps:

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### ☐ CAA hires

Summary:

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Next Steps:

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## LICENSING

**Want meeting notes like this with no extra work?**

With Hypercontext by Spinach, every meeting has a shared

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

Summary:

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Next Steps:

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### 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:

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Next Steps:

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**Want meeting notes like this with no extra work?**

With Hypercontext by Spinach, every meeting has a shared