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:

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

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: Next Steps:

ALL OTHER TOPICS

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

Summary: Next Steps:

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