

Sample First 100 Days Assistant



**To be added to LMS (Learning Management System)
(Trello, Google Drive, Trainual, ASANA, etc.)
Links to Learning Videos should be included**

Name: _____ **Date:** _____

0-30 Days

✓	Indicates the activity is completed		
Training		Target Date	Actual Date
	Learn and create Open House and Broker Preview Systems		
	Orientation		
	Set up and Sync Google Calendar with Team Lead		
	Watch Transaction Mgmt Videos on Client Entry and Pipeline		
	Watch Transaction Mgmt Videos on creating Closings		
	Learn Client Search in MLS and set up Portal		
	Follow Up with Escrow and Lenders on all Pending Deals		
	Make Calls to solicit Agent Feedback on a Listing Showing call/email		
	Gather Resources information to put together Listing Presentations		
	Gather Resources information to put together Buyer Presentations.		
	Practice Comping a Listing once each day.		
	Work with Team Lead on handling client issues		
Classroom Training		Target Date	Actual Date
	MLS Training		
	Attend TC/ Asst Scheduled Training		

SAMPLE FIRST 100 DAYS ASSISTANT

0-30 Days (continued)

✓	Indicates the activity is completed		
Role-Play		Target Date	Actual Date
	With Team Lead Role Play client follow up call		
	With Team Lead Role Play a Client Issue Call		
	With Team Lead Role Play a Lender/Atty Call		
Coaching		Target Date	Actual Date
	Weekly Accountability with the 4-1-1		
	Coach with Team Lead on Handling Client Issues		
Reading		Target Date	Actual Date
	4DX- 4 Disciplines of Execution		
Milestone Tasks - Bio Rocks		Target Date	Actual Date
	Have 10 Listing and Buyer Presentations prepared		
	Master CRM & Trans Mgmt & Lead Mgmt Systems		
	Be able to successfully comp and value any property for buyer/seller		
	Follow up with Escrow/Lender Consistently as needed		
	Update Clients and ask for referrals when appropriate		
	Handle a Customer Issue Call		
	Master Trans Mgmt Client Input and Pipeline to close		
	Successfully set up an Open House		
	Successfully set up a Broker Preview		
	Master Mail Chimp/BombBomb Email Campaigns		
	Understand Contract to Close Transactions		
	Manage Showing Request and Feedback		
	Showing Time on Tech Stack		

SAMPLE FIRST 100 DAYS ASSISTANT

31-60 Days

✓	Indicates the activity is completed		
Training		Target Date	Actual Date
	Practice answering a Request for Repairs on a listing		
	Analyze all Checklists in Trans Mgmt and keep Updated		
	Practice inputting a Sale Listing in the MLS		
	Practice writing an offer and listing agreement on an actual property		
	Create DocuSign or other tech templates for each type of client and transaction type		
	Practice follow up on Pending Offers out with Agents and Status		
	Prepare a disclosure package		
	Work with Team Lead on setting up systems and work on documenting the processes for Buyers and Sellers, Leads to Conversion to Closing		
	Work on Marketing and set up a Marketing calendar.		
Classroom Training		Target Date	Actual Date
Role-Play		Target Date	Actual Date
	With Team Lead negotiate a Request for Repairs and Termite Findings report		
	With Team Lead negotiate Appraisal on a property and Final Walkthrough		
	Practice fielding agent questions and answering accordingly		
Coaching		Target Date	Actual Date
	With Team Lead review offers		
Reading		Target Date	Actual Date
	Shift		
	Traction		

SAMPLE FIRST 100 DAYS ASSISTANT

31-60 Days (continued)

✓	Indicates the activity is completed		
Milestone Tasks - Bio Rocks		Target Date	Actual Date
	Process a transaction from open to close unassisted		
	Set up and navigate showings for buyers agent		
	Follow up on Pending Offers out with Agents and Status		
	Enter Listings in MLS unassisted		
	Answer all agent questions about a listing		
	System in Place and documented from Lead to Buyer		
	System in Place for Buyer to Contract and Listing to Contract.		

61-100 Days (Continued)

✓	Indicates the activity is completed		
Role-Play		Target Date	Actual Date
Coaching		Target Date	Actual Date
Reading		Target Date	Actual Date
	<i>One Thing</i>		
Milestone Tasks		Target Date	Actual Date
	Organize a Buyer Showing Appointment Beginning to End		
	Outline Systems in Procedures in an Operations Manual. Draft 1		
	Outline Systems for Marketing Plans and Procedures in Operations Manual Draft 1		

Curated and Created by Yvonne Arnold (2021-2022)