

# **Broker Follow Up**

## **Updating Report and Contact Information Sheets**

When performing these tasks, you are essentially performing the initial step that is a key element of the successful recruitment of agents. The next part, which is of equal importance, is the follow up from the broker.

In order for the broker to be able to contact the letter recipients as well as the new licensees you must ensure that both the report and contact information sheets are kept up to date at all times. At minimum, a weekly update of these forms is necessary.

The report sheet contains areas for comments and dates contacted. You are to complete these areas as the tasks are performed. Ensure your broker addresses the appropriate section on the form after follow up with these agents.

## **Accountability**

The effectiveness and ultimately, the success of this program will be determined by the accountability between you and your broker. As important as it is that you be accountable to the broker for completing all of your tasks, is that the broker be accountable to you for performing all necessary follow up.

By establishing a two way, interdependent accountability the program will be successful and results will be achieved.

***Steps to Follow:***

1. Ensure both sheets are updated weekly.
2. Ensure that the broker performs follow up and updates sheets.
3. Keep a strong level of accountability between yourself and the broker.