



**OLD REPUBLIC NATIONAL TITLE INSURANCE COMPANY**

**MENTORSHIP PROGRAM**



**Agency University**

Learn ★ Grow ★ Prosper

# **PARTICIPANT GUIDE**

# Program Overview

---

The Mentorship Program offers training and support to Old Republic Title agents and their employees. Working with a Mentor, participants define realistic goals, develop a practical sales process, and execute effective sales and marketing habits in a competitive environment can result in both business and professional growth.

## ENROLLMENT INSTRUCTIONS

Code Name: Create a Code Name at the time of registration. Code Names are used to insure anonymity on the weekly Rating Report .

Competition Category. Enrollment categories allow participants to compete with individuals that have similar job responsibilities.

- **Sales Professional:** Select this designation if you are a Sales Representative, Account Manager or at least 80% of your workday is devoted to sales and marketing.
- **MEC:** Managers, Escrow Officers, Closers and those who deem sales as secondary should select this category.
- **Observer:** Owners, Supervisors and Sales Managers who do not wish to participate in the competition can enroll as observers and are not required to create a Code Name.

## COMPETITION

Competition is designed to help motivate and measure progress and results. Each week participants total up the number of times they complete an activity and submit a scorecard form. A point value is assigned to each activity. Points are calculated electronically and totals are posted on the participant's dashboard and the weekly Rating Report.

## LENGTH OF SESSION

Program sessions run for seven consecutive weeks and are offered twice each calendar year, usually in the Winter and the Fall. For current dates, contact an Old Republic Title Representative. Participant's can and should begin working on pre-program coursework as soon as their registration is confirmed.

## MENTOR

Each participant works with a Mentor who acts as an accountability partner and coach and is available to assist and support the participant during the program. The Mentor and participant meet weekly (usually via a phone call) during the program to review progress, strategies and challenges. The length and agenda of the weekly check-in call varies based on individual's needs.

## VIDEO SALES TRAINING

Sales training videos on a wide variety of topics are posted on the Mentorship Program website and can be accessed by participants throughout the program. Handouts, tip sheets and practice exercises are included in all training programs.

# Pre-Program Coursework

---

## ORIENTATION

Once you are registered, visit the Mentorship Program website. Schedule time to review the instructional videos located in the Getting Started section. Each participant should complete the pre-program coursework prior to the start of the competition phase. Contact your Mentor if you have questions.

## BUSINESS PLAN

Begin to draft your Business Plan. A written Business Plan will help you outline what you are doing and where you are going. In addition, a well-drafted plan will help you define goals, assess resources and map out strategies. For sample templates visit the Mentorship Program website. Complete an entire Business Plan and you will be awarded bonus points.

## GOALS

Complete the Goal Worksheet. Goals can be short and/or long term. They should be in line with your Business Plan and be **Specific, Measurable, Attainable, Relevant and Time-based**. Points will be awarded when you complete the Goal Worksheet.

## TARGET LIST

Create a Top 10 Target List. Review your current list of prospects, narrow it down and make a list of the 10 most wanted. Review the list again and identify the next 5 most wanted new customers. Once a target is captured remove them from the list and select a new target from your next 5 list. Points will be awarded when you complete your Target List.

## PERFECT WEEK

Commit to a goal routine. Review the list of program activities. Complete the Perfect Week Worksheet and establish weekly activity goals. This will help you develop sales disciplines and sustainable habits. You will earn points when you complete this worksheet.

## TRACKING ACTIVITIES

If it's on paper, it's on purpose! Schedule all your activities on your calendar. This will help you track your progress. This is more than a wish or a "to do" list. It is time blocked out on your schedule for specific actions or activities. Scheduling time for activities keeps you focused, organized and adds structure to your sales process.

## REPORTING AND ACCOUNTABILITY

Each week you will be required to report your completed activities electronically. In addition, you will attend and participate in a weekly accountability call or meeting with your Mentor. Bonus points are awarded when you submit your weekly activity totals by noon each Monday during the program and for each weekly call with your Mentor.

<b>Independent Coursework</b>		
<b>Documents/Activities</b>	<b>Description</b>	<b>Points</b>
Business Plan	Review both Business Plans. Select and complete the plan that is relevant to you and your current position.	Long Form 50 Short Form 25
Goal Worksheet	Use the SMART method to complete your Goal Worksheet.	15
Perfect Week Worksheet	Review the program activities, then define a weekly goal for each activity.	15
Target List	Review your current prospect list. Select your Top 10/Next 5 Target Prospects.	15
<b>Perfect Week Sales Activities</b>		
Target Prospect Meeting	Agenda-based video, audio or if permitted, in-person meeting with a Target Prospect.	20
Appointment	Agenda-based video, audio or if permitted, in-person appointment with an existing customer or prospect.	10
Follow-up Appointment Scheduled	A scheduled follow-up appointment from a previous meeting, appointment or event.	10
Host/Participate a Virtual Event	Host or participate in a virtual group event.	10
Attend a Virtual Event	Attend a webinar, training session or virtual networking event.	5
Virtual Drop-in	Make a new social media connection or send a personal audio or video message to a customer or prospect.	5
Notes and Cards	Write and mail a handwritten note or card to a customer or prospect.	5
Ask for an Order or Referral	Verbally ask a customer or a prospect for an order or a referral	5
<b>Bonus Activities</b>		
New Customer	Receive an order or multiple orders from a New Customer	10
Weekly Scorecard	Submit your weekly scorecard by noon on Monday	10
Weekly Accountability	Attend a weekly accountability call with your Mentor	10

**Business Plan, Goal Worksheet, Perfect Week Worksheet and Target List should only be reported on a single scorecard. Do not report multiple weeks. Points are awarded for completing one Business Plan only.**

# GOALS

Goals move us forward. Having a written goal with a set date for accomplishment gives you something to plan and work towards at the start of the program. Agency University recommends the S.M.A.R.T. Goal method.

<b>INITIAL GOAL</b>	Write the goal you have in mind

<b>S</b>	What do you want to accomplish? Who needs to be included? When do you want to do this? Why is this a goal?
<b>SPECIFIC</b>	

<b>M</b>	How can you measure progress and know if you've successfully met your goal?
<b>MEASURABLE</b>	

<b>A</b>	Do you have the skills required to achieve the goal? If not, can you obtain them? What is the motivation for this goal? Is the amount of effort required on par with what the goal will achieve?
<b>ACHIEVABLE</b>	

<b>R</b>	Why am I setting this goal now? Is it aligned with your overall objectives?
<b>RELEVANT</b>	

<b>T</b>	What's the deadline and is it realistic?
<b>TIME-BOUND</b>	

<b>SMART GOAL</b>	Review what you have written, and craft a new goal statement based on what the answers to the questions above have revealed

**General or vague goal:** "I want some new customers."

**S.M.A.R.T Goal:** "I want 10 new orders in 2 months and will end my sales calls by asking my customers or prospects for a new order."

# TARGET LIST

Review your current prospect list. Use the space below to identify your Top 10 Targets. Don't overlook existing customers if growth opportunities exist. When you're putting this list together be sure you have a compelling reason for why this individual is a Top 10 Target. Define your target by name, not company. Use the bottom section to identify the next 5 prospects you will add when a target places an order.

## TOP 10 TARGET PROSPECTS

1	
2	
3	
4	
5	
6	
7	
8	
9	
10	

## NEXT 5 TARGET PROSPECTS

1	
2	
3	
4	
5	

# PERFECT WEEK

A sales process and a commitment to sales disciplines can contribute to your professional growth and help you know if you have had a productive and successful week. A process keeps us organized and focused and disciplines keep us striving to hit our goals. It's what has us picking up the phone again or making one more sales call before we go home for the day and it helps us create a tried and true sales process that nets results. When we develop a process and discipline ourselves to follow through the week can be perfect. What would your Perfect Week look like?

Create a process and commit to developing sales disciplines. Review the list of program activities, then decide how many times you want to schedule and complete these activities each week. Map it out using the worksheet below so Once completed click the "Submit your Perfect Week Goals" link and complete the electronic worksheet. Your Perfect Week Goals will display on your personal Perfect Week Dashboard.

My Perfect Week Activities Worksheet	My Weekly Goals
Target Prospect Meetings	
Appointments	
Schedule Follow-up Appointments	
Virtual Events (Host or Participate)	
Virtual Drop-in Visits/Connections	
Virtual Events (Attendee)	
Notes and Cards	
Ask for an Order or a Referral	

Electronic Perfect Week Worksheet

[Submit your Perfect Week Goals](#)

## Helpful Habits

- Review your goals every day
- Schedule all activities, tasks and reminders on your calendar
- Reschedule and make adjustments when necessary
- Start early and learn to pace yourself
- Make a To-do-List at the end of each day
- Schedule your weekly accountability check-in call as a reoccurring appointment and make it a priority