



Agency University
Learn ★ Grow ★ Prosper

MENTORSHIP PROGRAM

Reference Guide



PROGRAM DESCRIPTION

The Old Republic National Title Insurance Company Mentorship Program is a sales training program for title agents and their employees who are interested in developing the skills needed to be a successful sales professional.

BENEFITS and OBJECTIVES

- Discover how to, and why it's important to analyze your current business and practices
- Engage in the creation and implement a sales system
- Learn how to, and why it's essential to track, measure, and evaluate your progress
- How accountability influences your daily habits
- Experience the benefits of working with an accountability partner
- Gain practical experience by executing a sales process while participating in an anonymous competition
- Receive 24/7 access to video sales training
- Have some fun while learning and practicing new skills and habits!

EZLEARNING COURSEWORK

Both sessions include coursework posted on Old Republic Title's on-line learning management system.

EVALUATION TOOLS

- **Perfect Week Dashboard:** During Session II you will receive a link to a personal activity dashboard so that you can evaluate your progress. The dashboard will display your activity and competition point totals.
- **Leaderboard**
During Session II you will select a Code Name and participate in an anonymous competition. Each participant will receive a link to the competition leaderboard. The leaderboard displays participant ranking by weekly point totals.

MENTOR

Each Participant is supported by a Mentor who acts as an accountability partner and coach and is available for assistance and support during the entire program. Mentors and Participants 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 needs.

Course Outline

| SESSION I | |
|-------------|----------------------------------|
| Section 1.1 | Business Analysis |
| Section 1.2 | Target List |
| Section 1.3 | Goals to Habits |
| Section 1.4 | The Perfect Week Sales System |
| SESSION II | |
| Section 2.1 | Getting the Appointment |
| Section 2.2 | Interviewing for Success |
| Section 2.3 | Turning Prospects into Customers |
| Section 2.4 | Referrals |
| Section 2.5 | Networking |
| Section 2.6 | 23 Sales Mistakes |
| Section 2.7 | Loyal Customers |

Session I: Participants complete ezLearning assignments. During Session II points are awarded for completing each Session I assignment. This Session is self-paced but should be completed prior to enrolling in Session II.

Session II: Participants complete ezLearning assignments, implement their sales system and participate in the anonymous competition. Session II runs for seven consecutive weeks.

Weekly accountability calls with a Mentor occur throughout both sessions. Points are awarded for attending the weekly accountability call during Session II.

ezLearning Courses

Business Analysis
Target List
Goals to Habits
The Perfect Week Sales
System

During this Session, you will be introduced to several strategies and exercises that will help you develop a systematic approach to your sales strategy. There are four sections, each starts with a short video on a specific topic, a short knowledge check quiz, and an assignment(s) to complete. Depending on when you enroll in Session I, you may have up to four weeks to complete your assignments. Throughout this session, be sure to contact your mentor for assistance and guidance.

Once you have completed all your assignments, you will be ready to implement your Perfect Week Sales System and participate in the competition during Session II.

Business Analysis

Section 1.1

Each participant is required to complete a written Business Analysis. This will help you define goals, assess resources, and map out strategies. Your analysis includes the following topics:

History and Statistics Analysis

Loyal Customer Analysis

Company SWOT Analysis

Marketing and Sales Analysis

Competitor Comparison Analysis

Competitor SWOT Analysis

*Competition Points:
You'll earn 25 points during
competition (Session II)*

Assignments:

- Watch the Business Analysis video(s)
- Complete the Business Analysis Worksheets

Target List

Section 1.2

In this section you will review your current list of prospects and make a list of your top 10 target prospects or customers. 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.

Qualify Targets

Create a “Top Ten” Target List

Add a “Next Five” to the List

*Competition Points:
You’ll earn 15 points during
competition (Session II)*

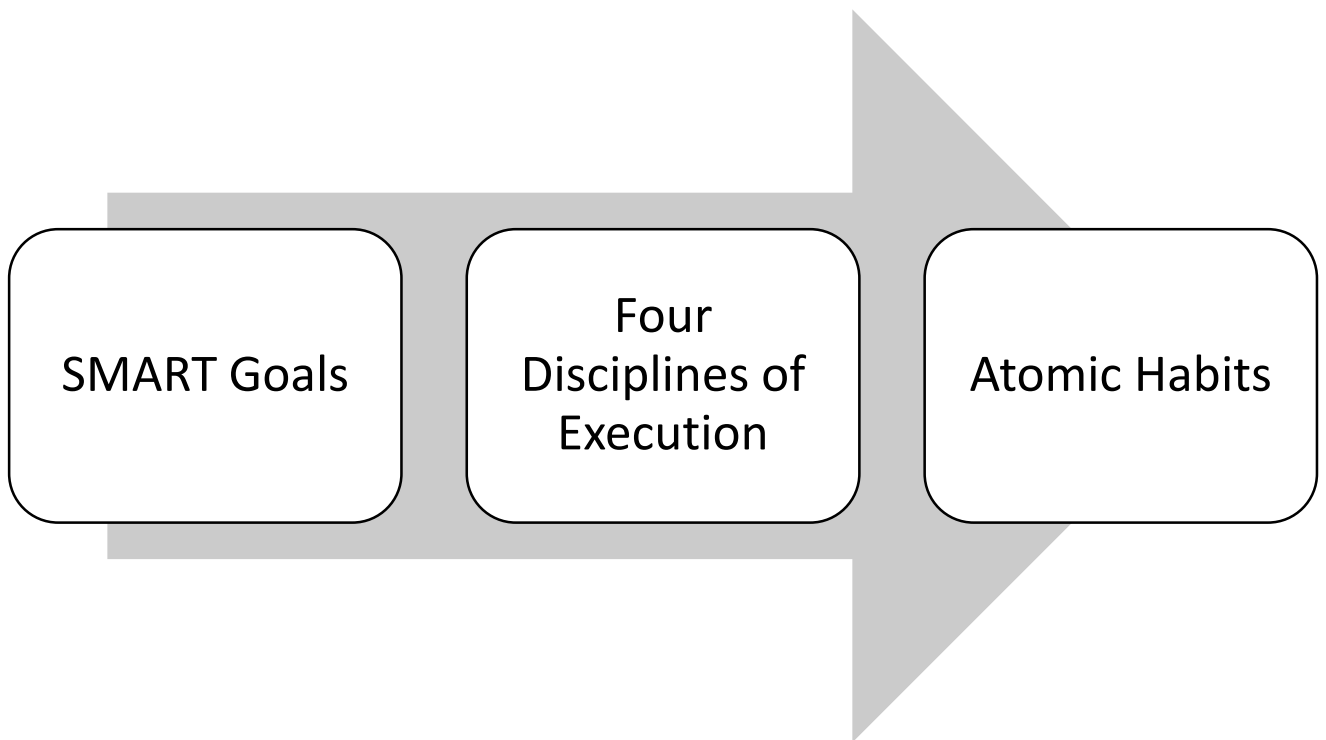
Assignments:

- Watch the Target List video.
- Qualify your targets
- Complete the Top 10, Next 5 list

Goals to Habits

Section 1.3

Once the Business Analysis and Target List are complete Participant's will use the SMART Goal methodology to define sales and marketing goal. Goals can be short and/or long term. In this section Participant's will also create your habit triggers.



*Competition Points:
You'll earn 15 points during
competition (Session II)*

Assignments:

- Watch the Goals to Habits videos
- Complete the Smart Goal Worksheet and the Habit Loop Worksheet

Perfect Week Sales System

Section 1.4

To create the Perfect Week Sales System, each participant reviews the list of impact activities and completes the Perfect Week Worksheet and establishes weekly impact activity goals. This will help to develop sales disciplines and sustainable habits.

Target Prospect Meetings

Appointments

Follow-up Appointments (Scheduled)

Events (Host or Participate)

Drop-in's (In-person or virtual)

Events (Attendee)

Notes and Cards

Ask for an Order or Referral

*Competition Points:
You'll earn 10 points during
competition (Session II)*

Assignment:

- Watch the Perfect Week video and the Activities review video
- Complete your Perfect Week worksheet and submit your weekly activity goals

Session II

- Sales Skills Training
- Building Sales Habits
- Tracking and Reporting Impact Activities
- Accountability
- Anonymous Competition



During Session II participants complete ezLearning sales training coursework and implement their Perfect Week Sales System.

Weekly courses are posted on the EzLearning platform.

Implementation includes scheduling and tracking impact activities each day, submitting a weekly scorecard report, attending a weekly accountability call with a Mentor.

Throughout Session II participants will have an opportunity to take part in an anonymous competition.

ezLearning

Sales Skills Training Programs

To help you sharpen your sales skills, each week participants will view a training videos for tips, strategies and suggestions followed by a knowledge check quiz to help retain the information. Handouts, tip sheets and templates are included.

Getting the Appointment

Interviewing for Success

Turning Prospects into Customers

Networking

Using Referrals to Grow Your Business

23 Mistakes of a Salesperson

Loyal Customers

Scheduling

During this Session you will schedule your impact activities on your calendar. This will help you track your progress. Intentionally scheduling meetings, appointments and tasks will help you stay focused, organized and will add structure to your sales system.

| 2022 | | March | | | | |
|---|---|---|--|--|----------|---------------------------------------|
| MONDAY | TUESDAY | WEDNESDAY | THURSDAY | FRIDAY | SATURDAY | SUNDAY |
| 28 1:00 Customer training presentation | 01 10:15 Target Meeting 1:30 T.Prospect Appt 3:00 Drop-in's | 02 8:30 Customer Meeting 11:00 Drop-in's:Victors, Sonesta 3:30 - New order asks | 03 9:30T Riley (Follow up Mtg) 11 - 1 Drop-in's 4:00 - Note cards | 04 7:30 Networking Event 11:00 Mentor check-in call 12:30 - Customer lunch 2:30 - Prospect Appointment | 05 | 06 2:00 - 4:00 Open House visit |
| 07 | 08 8:00 Ask for referrals 9:00 Schedule follow up with target 12:00 Networking lunch | 09 10:00Prospect Appointment 12:30 Prospect Lunch Meeting 2:30 - Skills training webinar | 10 8:30 Breakfast networking event 1:00 Prospect Appointment | 11 9:30Target Meeting 11:00 Mentor check-in call 2:00 Send notes and cards | 12 | 13 |
| 14 | 15 10:00 Prospect Appointment 1:00 Drop in visits | 16 9:00 Drop in visits 11:30 training webinar 2:00 Referral calls | 17 8:30 Follow up calls for new orders 10:00 Prospect Appointment 4:00 Networking event | 18 10:00Target meeting 11:00 Mentor check-in call Drop in to see Jason | 19 | 20 10:00 - 12:00 Open Houses |
| 21 | 22 8:00 Webinar 10:00 - 12:00 Drop-ins 1:00 - 3:00 Referral calls | 23 9:00 Prospect Appointment 11:00 Customer Appointment | 24 9:00 - 2:00 Sales Meeting 3:00 Follow up calls | 25 11:00 Mentor check-in call 12:00 Prospect lunch meeting 2:00 - 3:00 Drop in calls | 26 | 27 |
| 28 | 29 | 30 | 31 | 01 | 02 | 03 |

Accountability

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.

Weekly check-in meeting



Reporting

At the end of each week total up the number of times you complete each impact activity and electronically submit your report. A point value is assigned to each activity and is automatically calculated. Totals are posted on your dashboard and on the weekly Leaderboard.



OLD REPUBLIC TITLE
Mentorship Program Scorecard
Winter, 2021 Session

Participant Last Name

Participant First Name

Code Name

Business Development Plan (Long Form)

Business Development Plan (Short Form)

Top Ten Target List

Goal Worksheet

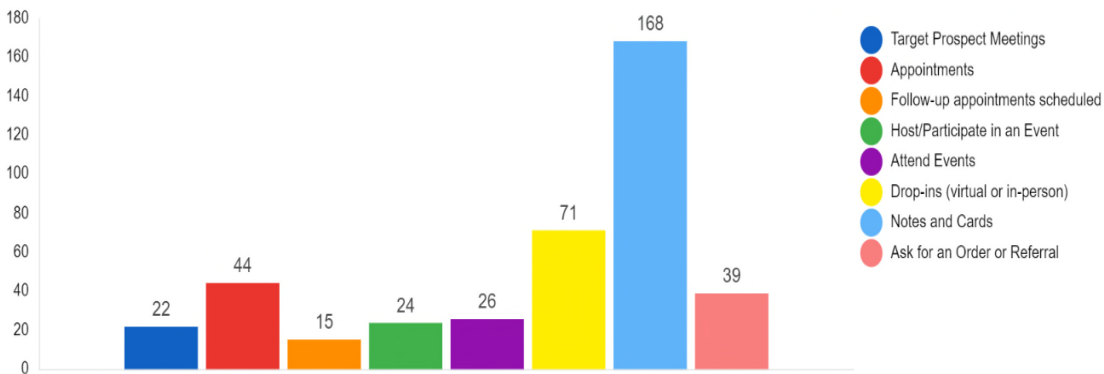
Perfect Week Worksheet

Accountability call with Mentor

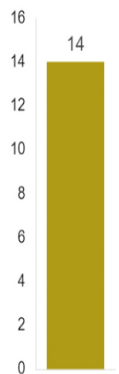
Tracking

Each participant receives a custom dashboard that displays activity totals, points earned and displays your impact activity goals to your actuals.

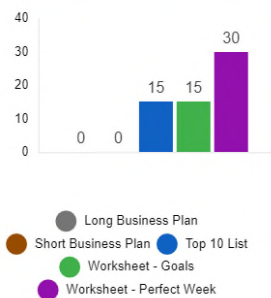
Perfect Week Activities



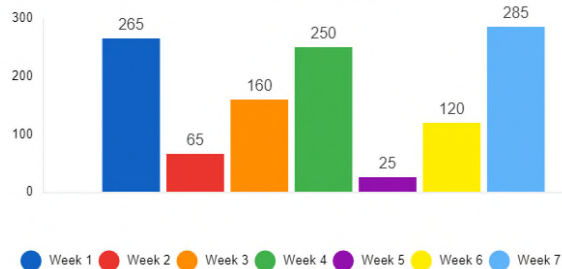
New Customers



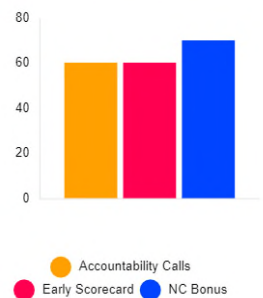
Coursework Points



Weekly Point Totals



Bonus Points



| Goal | Week 1 | Week 2 | Week 3 | Week 4 | Week 5 | Week 6 | Week 7 |
|----------------------------------|--------|--------|--------|--------|--------|--------|--------|
| Target Prospect Meetings | 1 | 0 | 1 | 2 | 0 | 1 | 2 |
| Appointments | 2 | 4 | 0 | 2 | 3 | 0 | 2 |
| Follow-up appointments scheduled | 1 | 2 | 1 | 1 | 2 | 0 | 3 |
| Host/Participate in an Event | 1 | 4 | 0 | 1 | 3 | 0 | 2 |
| Attend Events | 1 | 4 | 0 | 3 | 3 | 0 | 3 |
| Drop-ins (virtual or in-person) | 1 | 3 | 0 | 4 | 6 | 0 | 2 |
| Notes and Cards | 3 | 1 | 2 | 2 | 2 | 1 | 4 |
| Ask for an Order or Referral | 4 | 10 | 3 | 5 | 9 | 4 | 11 |

Evaluating

The competition is designed to help you measure your progress against others enrolled in the program. You will need to create a code name for the competition which will appear on the Leaderboard.

LEADERBOARD

| Placement | Codename | Week 1 | Week 2 | Week 3 | Week 4 | Week 5 | Week 6 | Week 7 | Total |
|-----------|--------------|--------|--------|--------|--------|--------|--------|--------|-------|
| 1 | Sapphire | 540 | 480 | 320 | 450 | 605 | 855 | 1045 | 4295 |
| 2 | Bakery Babe | 295 | 405 | 465 | 640 | 480 | 455 | 715 | 3455 |
| 3 | Coffee | 320 | 640 | 455 | 295 | 380 | 455 | 420 | 2965 |
| 4 | WW512 | 260 | 470 | 225 | 295 | 500 | 380 | 605 | 2735 |
| 5 | ESQ | 205 | 130 | 150 | 210 | 710 | 600 | 425 | 2430 |
| 6 | OhBoY | 360 | 400 | 295 | 330 | 295 | 295 | 360 | 2335 |
| 7 | 15Romeo | 290 | 340 | 20 | 420 | 450 | 490 | 315 | 2325 |
| 8 | Pilot | 330 | 160 | 185 | 225 | 430 | 305 | 265 | 1900 |
| 9 | Ditab | 230 | 0 | 430 | 0 | 470 | 305 | 380 | 1815 |
| 10 | Geronimo | 490 | 225 | 185 | 185 | 160 | 260 | 125 | 1630 |
| 11 | Ginganinja | 95 | 185 | 295 | 80 | 305 | 130 | 315 | 1405 |
| 12 | Will Wallace | 110 | 245 | 300 | 190 | 210 | 85 | 125 | 1265 |
| 13 | pgh closing | 150 | 195 | 190 | 150 | 225 | 10 | 90 | 1010 |
| 14 | Mike | 190 | 130 | 10 | 130 | 135 | 160 | 135 | 890 |
| 15 | Pink Rose | 265 | 195 | 0 | 80 | 105 | 70 | 60 | 775 |
| 16 | Danny Boy | 185 | 105 | 175 | 120 | 95 | 35 | 20 | 735 |
| 17 | Darkstar | 145 | 80 | 80 | 60 | 95 | 105 | 110 | 675 |
| 18 | Blue Line | 130 | 45 | 60 | 100 | 95 | 80 | 85 | 595 |