

BIG "I" MENTORSHIP PROGRAM 2020/2021

| NOVEMBER – PROGRAM INTRODUCTION | |
|--|--|
| Nov 2-13 | Mentor Matching |
| Nov 16-30 | Mentee/Mentor: Introduction Call (1 Hour) (Icebreaker Questions Provided via Email) Mentor: Provide Availability on Mentor Webpage for next month's 30 Minute Mentor Leaders Call* |

| DECEMBER | |
|-------------------------------|---|
| WEEK ONE (Dec 1-4) | Mentee/Mentor: Review Webinar Part One, Understanding Your Agency Operating Style |
| WEEK TWO (Dec 7-11) | Mentee: Submit Completed Worksheets to Mentor |
| WEEK THREE (Dec 14-18) | Mentee/Mentor: Connect on (1) Hour Call |
| WEEK FOUR/FIVE (Dec 21-31) | Mentee/Mentor: Alternate Week to Connect on (1) Hour Call Mentor: Provide Availability on Mentor Webpage for next month's 30 Minute Mentor Leaders Call* |

Reminder: Christmas, Dec 25

| JANUARY | |
|---------------------------|---|
| WEEK ONE (Jan 1-8) | Mentee/Mentor: Review Webinar Part Two, Employees, Your Key to Increased Productivity |
| WEEK TWO (Jan 11-15) | Mentee: Submit Completed Worksheets to Mentor |
| WEEK THREE (Jan 18-22) | Mentee/Mentor: Connect on (1) Hour Call |
| WEEK FOUR (Jan 25-29) | Mentee/Mentor: Alternate Week to Connect on (1) Hour Call Mentor: Provide Availability on Mentor Webpage for next month's 30 Minute Mentor Leaders Call* |

Reminder: Martin Luther King Day, Jan 18

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| FEBRUARY | |
|---------------------------|---|
| WEEK ONE (Feb 1-5) | Mentee/Mentor: Review Webinar Part Three, Preparing for the Company Visit |
| WEEK TWO (Feb 8-12) | Mentee: Submit Completed Worksheets to Mentor |
| WEEK THREE (Feb 15-19) | Mentee/Mentor: Connect on (1) Hour Call |
| WEEK FOUR Feb 22-26) | Mentee/Mentor: Alternate Week to Connect on (1) Hour Call Mentor: Provide Availability on Mentor Webpage for next month's 30 Minute Mentor Leaders Call* |

Reminder: Presidents Day, Feb 19

| MARCH | |
|-------------------------------|---|
| WEEK ONE (Mar 1-5) | Mentee/Mentor: Review Webinar Part Four, Yearly Planning & Agency Goal Setting |
| WEEK TWO (Mar 8-12) | Mentee: Submit Completed Worksheets to Mentor |
| WEEK THREE (Mar 15-19) | Mentee/Mentor: Connect on (1) Hour Call |
| WEEK FOUR/FIVE (Mar 22-31) | Mentee/Mentor: Alternate Week to Connect on (1) Hour Call Mentor: Provide Availability on Mentor Webpage for next month's 30 Minute Mentor Leaders Call* |

| APRIL – PROGRAM CONCLUSION | |
|-----------------------------------|---|
| WEEK ONE (Apr 1-9) | Mentee: Receives Directions for Special Assignment |
| WEEK TWO (Apr 12-16) | Mentee: Submit Completed Special Assignment to Mentor (details tba) Mentor: Participate in Final Group Mentor Call |
| WEEK THREE (Apr 19-23) | Mentee/Mentor: Connect on (1) Hour Call |
| WEEK FOUR (Apr 26-30) | Mentee/Mentor: Alternate Week to Connect on (1) Hour Call |

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HELPFUL REMINDERS:

- The Right Start Training series gives new and developing agency owners key tools and techniques to advance their agency.
- We recommend you scheduling your monthly connection times for December through April as soon as possible.
- Please keep "personal" information discussed between you and your mentee/mentor confidential.
- Remember participation in this program does not guarantee an appointment with ANY of the participating carriers.
- There will be "opt-in" monthly power 30-minute check in calls for mentors and separate ones for mentees throughout the duration of the program.

RIGHT START TRAINING SERIES CURRICULUM

Part One: Understanding Your Agency Operating Style

- 1.1 Identify Learn Your Agency's Operating Style
- 1.2 Identify Strengths, Weaknesses, Opportunities and Threats
- 1.3 Develop Your Agency's Value Proposition

Part Two: Employees, Your Key to Increased Productivity

- 2.1 Keys to Management Success
- 2.2 Evaluate Employee Job Design
- 2.3 Determine Growth Goals
- 2.4 Utilize Tracking and Reporting

Part Three: Preparing for the Company Visit

- 3.1 Prepare for Key Discussions with Company Representatives
including Learning How to Best Use Company Production Records
- 3.2 Understand the Carrier Agency Appointment Process

Part Four: Yearly Planning & Agency Goal Setting

- 4.1 Establish a Process for Setting Goals
- 4.2 Build Carrier Loyalty
- 4.3 Utilize Retention, Rounding and Referrals

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MENTOR / MENTEE CALL DATES

We strongly encourage calls to be scheduled during the second half of each month, providing time for mentees to go independently through training materials and assigned workbook pages in each month.

- November 20 -30
- December 14-31
- January 18-29
- February 15 -26
- March 15-31
- April 19-3

***Holidays:** Thanksgiving, November 26; Christmas, December 25; New Years, January 1; MLK Day January 18; and Presidents Day, February 15

MENTEE DATES TO REVIEW WEBINAR AND SUBMIT MONTHLY SELF-EVALUATION

We strongly encourage mentees to review webinars within the first two weeks of each month.

- Part One: Dec 1-11** (Mentees to email completed self-evaluation form to mentors by Dec 11)
- Part Two: January 1-15** (Mentees to email completed self-evaluation form to mentors by Jan 15)
- Part Three: Feb 1-12** (Mentees to email completed self-evaluation form to mentors by Feb 12)
- Part Four: March 1-12** (Mentees to email completed self-evaluation form to mentors by Mar 12)
- Final Assignment: April 1-16** (Mentees to email completed final assignment to mentors by Apr 16)