Mentor Meeting Recap

September 11, 2026

COMPASS HEALTH CONSULTANTS®

QUICK RECAP

This meeting focused on introducing a new structured framework for leaders to scale their businesses with Compass. Yvonne presented a comprehensive blueprint covering everything from initial setup to ongoing operations, including recruiting processes, new agent training schedules, communication protocols, and performance tracking systems. The presentation included detailed SOPs, templates, and checklists that leaders can customize for their teams, with all materials to be made available on a new mentor site (chcagents.com/mentors). Key discussions centered around the importance of having “backup” or second leaders, maintaining consistent communication with new agents, implementing a shadow program before formal training, and addressing challenges with virtual team management. The group also discussed specific operational issues including TopBroker access delays, contracting completion. Joe emphasized the need for accountability and consistent implementation of these processes, while the team agreed to reconvene in early October to discuss implementation results and track progress on the new system.

NEXT STEPS

Collaboration

- **All Leaders**: Bring specific metrics to the next meeting (October 16th) for discussion, including: conversion rates, first new business timelines, retention rates, and best practices.
- **All Leaders**: Implement the discussed SOPs, checklists, and training schedules with their next new agent class (targeting the class starting September 22nd/October 20th).
- **Bella/Recruiting Team**: Align on the process for when to enroll recruits in new agent training, considering the shadow program or virtual alternatives.

SUMMARY

Leadership Structure & Scaling Blueprint

Joe and Yvonne led a meeting focused on providing structure and resources for leaders and new leaders within the organization. Yvonne presented a comprehensive blueprint covering key aspects of scaling a business, including setting up communication tools, establishing training processes, managing new agent onboarding, and maintaining office culture through regular team events. The discussion emphasized the importance of quarterly or semi-annual Compass investment reviews, with Joe clarifying that Compass shares rent expenses and provides recruiting resources. The meeting also addressed managing virtual teams and recruiting agencies, with Brian Drennon sharing insights about the additional work required for agency management.

Recruitment Metrics & Optimization

Yvonne discussed the importance of business owners understanding key recruiting metrics including ad copy performance, conversion rates from booked to hired candidates, and monthly ad spend trends with year-over-year comparisons. She emphasized that business owners should track what's working, optimize frequency and timing of recruitment efforts, and regularly check in with the "bellas" team about exam passers and reimbursements. Yvonne mentioned that recruiting and training SOPs would be available on their website after the meeting.

Mentor Recruitment Blueprint Presentation

Yvonne presented a new blueprint for recruiting and onboarding mentors at chchagents.com/mentors, emphasizing that it's an under-construction site requiring password protection in Q1. She outlined the process for using the content, including protocols for obtaining Compass branding and logos through the marketing team. Yvonne detailed the recruiting SOP, which includes steps for exam scheduling, study guide purchases, and fingerprinting, and she stressed the importance of updating the Monday recruiting board and communicating with new recruits after they pass their exams.

Virtual Agent Management Guidance

Loye requested guidance on managing virtual agents, expressing a desire for one-on-one support to improve organization and focus. Yvonne shared two key interview questions: one about accepting responsibility for actions and another about willingness to promote oneself on social media, emphasizing their importance in identifying suitable candidates. Yvonne also mentioned a recruiting contingency binder that helps new agents navigate contracts and processes, noting it may need updates due to new carriers.

Team Task Management & Process

Yvonne discussed the challenges of getting team members to complete tasks and emphasized the importance of organizing resources in one accessible location. The group discussed making a form fillable, with Compass offering to help with Adobe assistance. Yvonne highlighted a roadmap for life insurance processes and stressed the importance of tracking application dates. She also introduced a new agent expectation list and marketing action checklist, encouraging team members to customize them as needed and emphasizing the importance of setting clear goals with new agents in their first week.

New Training Program Presentation

Yvonne presented a new training script and schedule template that combines prospecting sheets with training materials, which includes specific weekly objectives and role-playing sessions for new agents. She explained that the 3-week training program includes structured activities from 9 to 6 every day, with week one focusing on basic training and week two emphasizing specific trainings and role-play sessions. Yvonne noted that the materials are not Compass-branded but can be adapted for other teams, and she offered to share the digital version with others.

New Documentation Process Implementation

The team discussed implementing new documentation and processes, with Joe raising concerns about ensuring effective execution after the meeting. They agreed to move their next meeting from October 16th to October 1st to allow time for implementation before the CRM training on October 20th. Jeremy suggested implementing monthly tracking and measurement of the new processes, with plans to report back at future meetings and develop formal reporting in Q1.

New Agent Training Process Updates

The team discussed challenges with the new agent training process and agreed on implementing a shadow program where agents complete licensing and contracting before attending formal training. Brian Drennon explained how his team successfully uses shadowing to prepare new agents, with the program allowing them to complete contracting and get familiar with processes before formal training begins. The group also addressed delays in accessing Top Broker systems, with Joe confirming that he and Brian Drennon are working to resolve these issues with Sri and Tanya.