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Training Manual



The

OCCG

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Leadership

The leadership aspect of the OCG is the one that requires the most effort, but is also the most fulfilling. The experience will truly make you a better leader and communicator, setting you up for more fulfilling work and communications elsewhere. The systems learned will enable you to create buy in, learn about others and learn about yourself.

The specific areas of leadership to consider in the context of this internship are the presentation report, running meetings, meeting minutes, the group chat and communication.

One big thing to keep in mind is that things take time, especially when you're growing. Do your best to implement what you learn and it will come. Keep making an effort and it will happen.

Order of Operations:

1. Your communication will be something to work on and be aware of in perpetuity, that never ends. The groupchat is also hard to place an order on, since it just happens. Make sure to keep it active and lighthearted.
2. For the presence report you create your part of the report, read over the contributions of others, then summarize. You will then send a PDF version of the report to those attending the meeting, give your presentation and summarize at the end.
3. Always be sure to prepare meeting minutes in advance. Having a set agenda of what will be discussed and when is a very easy way to take control.

Timelines / Due Dates:

- Talk to your team lead to determine due dates for the report, the PDF and when meetings will be.

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Directions:

[Communication](#)

[Group Chat](#)

[Meeting Minutes](#)

[Presence Report Leadership](#)

[Running Meetings](#)

Resources:

[Leadership Training Folder](#)

[Intern Leadership Folder](#)

FAQs:

- Why a group chat with the leaders? Should we make our own?
 - No. Group chats with just a few people and not everyone always devolve into toxicity and gossip.
- What should we not do in a group chat?
 - Don't ever assign tasks in a group chat or say something negative about a member.
- What should we do in a group chat?
 - Encourage others, remind people about tasks, share wins and have fun.
- What happens if people aren't engaging in a meeting?
 - Wait it out. Let them sit in the silence. People will get the message and start engaging.
- Who should have copies of meeting minutes?
 - It depends on the meeting. Usually you want two copies: a public one and a different one for yourself.
- Any other tips?
 - Be patient. Believe in yourself. It will come.

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Analytics Management Overview

OCG Analytics Management encompasses how we track the success of our team members and continuously improve overall company performance. This role is essential to the long term success of The OCG as an organization and all the individuals that fall within it as well as the community we impact.

Strategy:

Utilizing various analytics applications we can highlight those who are thriving and identify areas of improvement. Some of the various platforms used in this process include the following:

- CTE Biz
- Google Analytics
- Google My Business
- LinkedIn Analytics
- Pinterest Analytics
- TikTok Analytics
- Canva
- Instagram Analytics
- GroupMe
- Google Docs
- Gmail

Responsibilities:

1. Monitor Performance of Agents, OCG Team, & OCG Social Media Channels
2. Create Weekly Analytics Report
3. Meet Weekly with OCG Leadership via. Analytics Meeting
4. Present Analytics Report Findings, Conclusions, & Recommendations to OCG Team & Agents alike

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CTE Biz

We use CTE as our primary data collection and analysis tool for agent's key performance indicators (KPIs). This site hosts an excel sheet that provides an in-depth analysis of our agent's goals and trends, dashboards/overviews of the company's performance, live contests comparing to compare agent's KPIs, and more.

Strategy:

The main goal behind CTE is to accurately track agent metrics and present valuable reports that tell a story for others. While you may not need to login to CTE on a daily basis , you can expect to be inputting data regularly (to be elaborated further). CTE has a lot of features, most of which you may not use immediately. The best way to understand this is by experimenting with the different features available. Please note that while this acts as an excel file, you will need to contact the CTE team for specific changes.

Order of Operations:

- Watch the [Basic Guide](#)
- Reach out to C.H. for login information
- Agents will report their metrics daily in the analytics group chat ("See OCG Data Reporting Groupme" for more information) under this format:
 - Knocks/Answers/Conversations/DecisionMakers/ListingAppointmentsSet/Listing AppointmentsHeld/ContactsObtained/Dials/Pickups/AppointmentsSet/AppointmentsHeld/Closes
 - For example, an agent may report 0/0/0/0/0/0/0/0/50/5/0/0/0 which shows that this particular agent had 50 dials and 5 pickups that day. Even if an agent reports all 0's, we recommend that you still enter those values in CTE
- Either manually record these metrics in CTE using the Lead Gen Tab from the home page (**not recommended** due to chance of dirty/inconsistent data) or enter the information through the lead gen form provided: <https://bit.ly/3xEbJvf>
 - The lead gen form is the microsoft equivalent of google forms and directly imputed into the Lead Gen Tab when you submit.

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- Access the list of agents and their goals through the “Business Plan” tab from the home page. Once you have listed the agent, go to the “Lead Gen” Tab and press “Click to update lead gen roster” to have an updated form.
- Contracts can be recorded in the “My Business” tab
- The tabs at the top of your form lead to various dashboards and depictions of the data you input. For example, the contest tab compares all agents live based on a specific KPI.
- A useful tab to be familiar with is the “Lead Gen KPI’s” tab that will provide you with a summary of all KPI’s per agent for the previous week or a custom range.
- The “Agent Scoreboard” tab provides an in-depth analysis of a specific agent.
- The best way to familiarize yourself with these mechanics is to explore it for yourself. A lot of this is not changeable by nature of the platform, but you can reach out to the CTE team to see what you can do.

Timelines / Due Dates:

CTE data should be inputted daily after receiving the metrics from the agents.

Directions:

[Basic Guide](#)

Resources:

[CTE Site](#)

[Some more notes](#)

[CTE Youtube guides](#)

 [List of KPI Tracking Fields](#)

 [\(CTE\) Team Members Daily Data Input Schedule](#)

FAQs:

- This is kind of complicated. Why bother?
 - Yes, it's a bit of work. But in the end it makes our lives easier. More on the front end, but makes things so much more efficient over time. Hard to create your own spreadsheet with this amount of information.
- Who do I contact for CTE Biz related questions and support?
 - Email Calvin Mergen from CTE Support directly at calvinmergen@gmail.com

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- I can't edit some cells?
 - CTE is restricted in that manner, but just reach out to the team for those changes.

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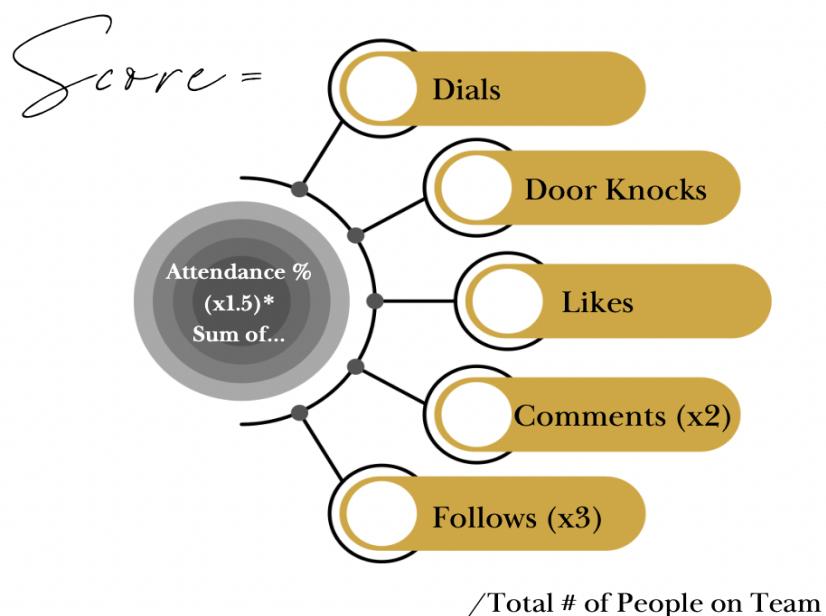
Set Scores

OCG Team Set Scores are calculated weekly and included in the Weekly Analytics Report. The OCG is split into Teams and scores are calculated based on the following metrics: Dials, Door Knocks, Likes, Comments, Follows, & Team Attendance. The Raw Scoring formula as well as instructions for how to obtain this data is noted below. Additionally, resources such as the “Set Score Attendance” and “Set Score Calculator” Google Sheets are helpful when determining each team’s Set Score for that week.

Raw Scoring Formula:

Team Total Dials +
 Team Total Door Knocks +
 Team Total Likes +
 $2 \times$ Team Total Comments +
 $3 \times$ Team Total Follows

(Raw Score x Team Attendance Percentage) / # of teammates = Set Score



Instructions for Weekly Submission:

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- Please submit the following stats for **each** of your platforms to the **Analytics Group Chat**.
 - Likes/Reactions, Comments (comments and replies count separately), Follows
- Most platforms have an analytics page in which this information is summarized, if not, then count the stats for all the posts the previous week.
 - Ensure that your stats are for the **last week only**
- Please send this information to us by **7pm PST Sunday**

Timelines / Due Dates:

- Set Score Data is submitted weekly by members of each team to be included in that week's Analytics Report.

Directions:

 Set Score Rundown

Resources:

 Set Score Calculator

 Set Score Attendance

FAQs:

- How do I determine each person's individual attendance?
 - Attendance is tracked on a daily basis and calculated for each week using the Set Score Attendance Google Sheet. Simply navigate to the tab on the spreadsheet that correlates to the week you are creating a report for and scroll through each person's daily attendance. In the sheet a Y means they attended the meeting on time, an L indicates they attended the meeting late, and a X indicates they were absent for that scheduled meeting. All blank boxes on the spreadsheet indicate nothing was scheduled for a specific individual at that time.
- What does the first tab of the "Set Score Attendance" Google Sheet show?
 - The first tab of this sheet shows the regularly scheduled meetings and bonus meetings for each OCG team member by day. You can compare each week's attendance back to this first master schedule tab to ensure that nobody's scheduled meetings have been missed in your final set score calculations.
- Any tips for calculating Set Scores?

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- Be sure to stay organized when working through this process and utilize the “Set Score Calculator” spreadsheet- it allows you to calculate set scores all in one place for easy future reference!

“The OCG CTE” Reporting GroupMe

Metrics such as CTE KPIs and Set Score numbers are collected through the GroupMe “The OCG CTE” chat with all the agents. We promote that agents send their scores in a group

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chat environment so that we can recognize those who deserve it and build a sense of competitiveness between agents. This is an opportunity for the analytics team to connect and build relationships with these agents. While repetitive, this allows you to learn with the agents and teaches valuable skills.

GroupMe Agent Emojis:

- Each agent chooses their own custom emoji to indicate whenever they have set an appointment.
- **The 🕒 emoji is meant to signify that an appointment was held.** Ensure agents report both these values accurately when they list their numbers for CTE.

CTE Biz:

- CTE metrics should be collected daily. The analytics team is responsible for sending 2-3 reminders each day asking agents to submit their data in the following format:
 - Knocks/Answer/Conversations/DecisionMakers/ListingAppointmentsSet/ListingAppointmentsHeld/ContactsObtained/Dials/Pickups/AppointmentsSet/AppointmentsHeld/Closes
- Note the time when you send your reminders. If you send it early in the day/afternoon, create a message that promotes good behavior and encourages agents to make calls. We don't want to ask for numbers even though their day might not be over. The ideal time to ask for CTE metrics is between 5pm - 10pm pst.
- Once you collect these numbers, make sure that they are inputted into CTE to ensure we have an accurate representation of agent's work

Set Scores:

- Set Score information should be collected weekly on Sunday. Each team is responsible for submitting the likes, follows, and comments for their social media platforms before 9pm.
- Send a reminder message Sunday morning to give time for agents.

FAQ:

- How do I join "The OCG CTE" GroupMe Chat?
 - Be sure to remind C.H. to have you added or to add you directly to "The OCG CTE" data reporting GroupMe Chat! This is essential as this is where all data is

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reported for analytics tracking. C.H. and other appointed OCG team members will also be incharge of adding new OCG personnel so be sure to note when somebody new is added so you can request updates to the CTE Agent roster.

■ To add a new agent to the CTE Agent Roster email Calvin Mergen from CTE Support at calvinmergen@gmail.com

- Any tips?
 - Set a reminder to send your messages. Input the previous day's CTE in the morning.
- What to do if not everyone is responding?
 - It is hard to get a day where all agents respond. Some agents only report when their CTE values are not all 0's. One method is mentioning that specific agent through @... Only enter CTE info for those who enter values in the group chat.

Google Google Analytics

A wide and in-depth amount of data from our website is tracked through Google Analytics. We use this powerful tool to track and analyze our website traffic and garner valuable insights about the people who click onto our website, where they click from, and what they engage with on theocg.com. We aim to gain a better understanding of our online users and

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ensure that we are attracting audiences who will become clients. Our platforms are not catering towards the masses, instead we are attracting those we want to work with, so remember the quality of users is more important than the quantity when analyzing trends.

Strategy:

Google Analytics is extremely helpful when it comes to monitoring our online presence across all platforms and will be integral to seeing if our systems-based changes are successful. While there is little to change or input to Google Analytics, it is helpful to check in daily and see if any changes occurred. For instance if we posted on Instagram, looking at the Google Analytics to see how it affected the website traffic the next day would provide valuable insights for the team and those managing the Instagram. This is the core of the Google Analytics function; sharing data to the team in order to make informed decisions about online platforms. Since the goal of our social media and various marketing efforts is for people to click onto the website, Google Analytics provides the necessary tools and data to measure our effectiveness.

Order of Operations:

- Gain access to theocg.com Google Analytics, ensure your access is fully enabled as an administrator. This will allow you to make changes, set goals, and generate reports.
- When analyzing data, ensure that the date range is the same across all data sets. For online presence reports it will likely be in the past 7 days to allow for a week by week comparison.
 - It is best to analyze data from one Saturday to the next. This will allow you time to generate insights for your team members before the online presence report.

Timelines / Due Dates: Updating Team Members

- It is imperative to convey important data to your team members about their platform's performance. While most platforms have individual analytics, Google Analytics has the most comprehensive tools for analyzing user behavior on our website.
 - A day before the presentation is due, generate an overview report for each platform's performance for the past week and send it to team members for them to analyze and integrate into their section for the online presence report.
- Ongoing Tasks

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- Spend at least 10 minutes every day analyzing web traffic trends, pay close attention to social media acquisitions when we post on a platform.
 - For example, we usually send marketing emails on Tuesdays, so analyzing the web traffic generated from direct links will provide valuable insights about what is and isn't working.

Directions:

[Google Analytics Overview](#)

Resources:

[Google Analytics Folder](#)

[Google Analytics Glossary](#)

[Google Data Studio - Weekly Report](#)

FAQs:

- What if I have never used Google Analytics before?
 - That's completely alright and it's understandable if at first glance Google Analytics is overwhelming. The best way to learn the platform is to spend time navigating through its data. Start at the home page and the pre-generated graphics then maneuver through the other pages.
- What are the key insights to focus on for the OCG?
 - Our business is built on relationships which translates to online interactions with our users. From this we focus on our audience, where they are browsing from, how long their session is, what pages they focus on, when they interact and especially how they arrived at our website. The audience and acquisition sections are the most helpful for these reasons.

Google My Business

The OCG has a Google My Business (GMB) account where we manage our business profile on Google. The main goal is to boost search engine optimization and maintain a vast online presence on Google. Key features of GMB for the OCG are the insights function and the photos function. We track our searches through GMB and Google Analytics while also uploading all imagery and videos that are posted on any other platform or social media with the correct and identical metadata.

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Strategy:

The main directive of the GMB page is uploading all OCG pictures and videos with the correct meta-data onto the photos page. By uploading the content onto GMB it categorizes it as ours, so any traffic that Google tracks from the content will be recognized as ours and boost our Search Engine Optimization (SEO). The GMB insights can also be useful for online presence reports in conjunction with Google Analytics.

Order of operations:

- When an image or video is posted on any platform associated with the OCG download it directly from the drive onto your desktop.
 - When a team member posts on their respective platform, have them notify you of what they posted and make sure they upload it to the posted content folder.
(linked below)
- Log onto the Google My Business account and scroll down to the Photos on the left hand side.
 - **DO NOT CLICK ON THE WEBSITE TAB ON THE LEFT**
 - **This will redirect traffic away from our website.**
- There will be a blue circle with a plus sign, click on this and upload the downloaded content.
 - Sometimes videos take a while to fully load, don't close the tab until it's finished uploading but you can move onto another website.

Timelines / Due Dates:

Posting photos / videos to GMB

- Try to upload content to the GMB profile as soon as possible after it is posted to another platform, this will help ensure our views are tracked by Google.
- Staying up to date with posted content across all platforms is paramount to boosting the OCG's profile on GMB

Directions:

[Google My Business Overview](#)

Resources:

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[Google My Business Folder](#)

[Posted Content Folder](#)

- This is where all content across platforms should be uploaded and can be downloaded to add to GMB. There is also a document describing how to properly assign metadata.

[Assigning Metadata](#)

FAQs:

- What if a video file is too long to upload?
 - Decrease the size/quality of the video. This should allow you to upload the video and it will still have the same metadata (title, location, description etc.) as before and Google will track it as traffic for the OCG. Try to upload the original video first before altering it.
- What happens if I click the website tab on the left?
 - Try to avoid this at all costs! If you do, click the back arrow and immediately leave the page. When this tab is clicked, Google attempts to redirect traffic from the OCG's current website and onto a link that Google will attempt to create.
- What should I upload to the GMB profile?
 - Everything! Any imagery or content that we use for email marketing, all social media platforms, logos, and anything else that is online. If you think it could be tracked by Google, then put it in the GMB!

Weekly Analytics Report Contents

The OCG Weekly Analytics Report outlines company performance on a weekly basis including analysis of agent data metrics pulled from CTE, calculated attendance percentages of the entire OCG Team pulled from the Set Score Attendance Google Sheet, finalized OCG Team Set Scores along with all listed data fields for easy reference pulled from the Set Score Calculator Google Sheet, and top performing OCG teams/individuals. Top performance highlights are to be pulled from top agent CTE KPI fields, top OCG team Set Score attendance percentages, and top team total weekly Set Scores.

Strategy:

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Inside the OCG Canva account is the “OCG Analytics - Reports” folder that contains various tools utilized to format each week's report. The document entitled “NEW LAYOUT Weekly Analytics Report” is the most up to date format used to consolidate each week's data into an Analytics Report. Additionally, the presentation entitled “Weekly Analytics Report - Infographics” (also inside the same “OCG Analytics - Reports” folder) has various formats of infographics that can be used to generate an executive summary of the findings drawn from that week's Analytics Report. Send the Executive Summary Infographic *ONLY* to The OCG team via. the CTE Reporting GroupMe, serving as a benchmark of the team's progress that week for everyone's easy access and reference.

Order of Operations:

OCG CANVA: Inside “OCG Analytics - Reports” Folder

- Weekly Analytics Report: “NEW LAYOUT Weekly Analytics Report” Document
 - Summary: Report document outlining agent's weekly performance including data analysis of KPI fields, OCG Team Attendance, OCG Teams Set Scores broken down by team, and highlighting top performers across The OCG in various areas.
 - Reports Contents Page by Page Breakdown:
 - PAGE #1: Title Page
 - The “Title Page” of each Weekly Analytics Report **includes the dates of which report data contents are derived from.**
 - PAGE #2: Table of Contents
 - PAGE #3: At a Glance
 - This page highlights **Team Total # of Dials & Pick-Ups** at the top of the page and also contains the “Key Successes” section which shows **Percent Change v.s. Previous Weekly Period** for both **Dials & Pick-Ups** (Color Coded Green or Red Indicating Positive or Negative Trend) as well as a **Bar Chart Analysis Graphic comparing Team Total # of Weekly Dials & Pick-Ups to the Previous Weekly Period's Team Total # of Dials & Pick-Ups.**
 - Bar Chart Analysis Graphic Tip: *Graph the Previous Weekly Period Data in Gray & The Current Week's Data in Gold (Both OCG Company Colors)*
 - PAGE #4: Dials & Pick-Ups
 - This page showcases an in-depth breakdown of Dials & Pick-ups KPI metrics, organized by each agent and ranked in order of agent performance (Note: *Agents with 0 Dials/Pick-Ups are not to be included in this breakdown*). **Each Dials & Pick-Ups breakdown grid lists each Agent's Name with their corresponding data metrics including:**

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- DIALS/PICK-UPS: Each Agent's Individual Total # of Dials/Pick-Ups
- RANK: Agent's Rank (In Context of All Agent's Performance)
- TRENDING: Upwards/Downwards Trend & Positive/Negative Difference in Total # of Dials/Pick-Ups from Previous Weekly Period (Color Coded Green or Red Indicating Positive or Negative Trend)
- % CHANGE: Percent Change in Total # of Dials/Pick-Ups from Previous Weekly Period (Color Coded Green or Red Indicating Positive or Negative Trend)
- PAGE #5: Door Knocks Progression
 - The "Door Knocks Progression" page HIGHLIGHTS: Door Knocks specific KPI's Measured, Agent Breakdown Grid (Note: Agent Breakdown Grid on this page should be used for highlighting the Door Knocks Progression KPI Metric with the MOST Agent Data for that week), and various corresponding Highlights & Trends.
 - The Highlights & Trends segment INCLUDES:
 - # of Team Total Door Knocks
 - Percent Change *in Door Knocks* from Previous Weekly Period (Color Coded Green or Red Indicating Positive or Negative Trend)
 - Leading Agent (This is the Agent with the Most Weekly Door Knocks)
 - # of Team Total Appointments Set
 - Leading Agent (This is the Agent with the Most Weekly Appointments Set or Held depending on which metric has the most data that week)
 - # of Team Total Appointments Held
- PAGE #6: Data Modeling
 - This page includes Pie Graph modeling of agent's weekly data for the following KPIs: Dials, Pick-Ups, Appointments Set & Appointments Held - Along with the Leading Agent in each of these KPI areas.
 - Note: The pie graph's show each agent's percentage of team total number of weekly Dials/Pick-Ups/Appointments Set/Appointments Held.
 - Note: Included (above each model & below the model title) is the Leading Agent in that specific area which highlights the agent who was responsible for the largest percentage of Dials/Pick-Ups/Appointments Set/Appointments Held.

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- **PAGE #7: OCG Team Attendance**
 - This page lists the attendance percentages of the ENTIRE OCG TEAM (including our CEO, C.H.), with grid breakdown containing team members' names corresponding with their attendance percentages ranked in order from highest to lowest performance.
 - *Note: Attendance percentages are calculated by dividing an individual's total number of regularly scheduled weekly meetings attended ON TIME by that person's total number of regularly scheduled weekly meetings and then multiplying that decimal by 100 (to get a percentage instead of a decimal).*
- **PAGE #8: Attendance Top Performers**
 - This page lists the names of all OCG Team Members who earned 100% Set Score Attendance for that week.
- **PAGE #9: OCG Team Set Scores**
 - This page highlights each OCG Team's weekly Set Score along with a breakdown of their totals in each raw scoring category.
- **PAGE #10: Set Scores Leaderboard**
 - This final page of the report highlights which teams had the highest weekly Set Score by providing an updated weekly Set Scores Leaderboard with top 3 teams ranked from highest to lowest weekly Set Score.

Timelines / Due Dates:

- Each Weekly Analytics Report is due prior to that week's Analytics Meeting with C.H. so that it can be presented and reviewed during that time.
 - Send the Weekly Analytics Report as PDF directly to Analytics Text with C.H.

Directions:

OCG Analytics Management

Set Score Rundown

- General information regarding OCG set scoring and guidelines on how to actually calculate each score

Resources:

Set Score Calculator

- Spreadsheet that can be used to calculate set scores of OCG team(s)

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 Set Score Attendance

 List of KPI Tracking Fields

- List of KPI's we want to track in CTE

 (CTE) Team Members Daily Data Input Schedule

- Team rotation scheduling who is responsible for inputting agent's reported data from GroupMe chat into CTE each day

 CTE Notes

- Navigation tips and insights/strategies for using CTE

[CTE Tutorial Video](#)

The OCG Weekly Analytics Report - Examples & Related Content Materials:

- [ALL Analytics Reports & Related Content FOLDER](#)
- [Weekly Analytics Report Example FOLDER](#)

FAQs:

- What if a video file is too long to upload?
 - Decrease the size/quality of the video. This should allow you to upload the video and it will still have the same metadata (title, location, description etc.) as before and Google will track it as traffic for the OCG. Try to upload the original video first before altering it.
- What happens if I click the website tab on the left?
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- What should I upload to the GMB profile?
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