



## YEAR-END CHECKLIST FOR AGENTS - 2025

- ☐ Organization Standard \_\_\_\_\_
- ☐ Accounting \_\_\_\_\_
- ☐ Compensation/Benefits \_\_\_\_\_
- ☐ Office \_\_\_\_\_
- ☐ Technology \_\_\_\_\_
- ☐ ECRM Views \_\_\_\_\_
- ☐ Communication Audits \_\_\_\_\_
- ☐ Phone Reports \_\_\_\_\_
- ☐ Recruiting \_\_\_\_\_
- ☐ Staffing Needs \_\_\_\_\_
- ☐ Team Evaluations \_\_\_\_\_
- ☐ Team Development \_\_\_\_\_
- ☐ Marketing Evaluation \_\_\_\_\_
- ☐ Communication Plan \_\_\_\_\_