

3-WAY CALL CHECKLIST

SPONSOR / CALL COORDINATOR RESPONSIBILITIES

1. Before the Call: **How to Prepare for the 3-Way Call**

Prepare New Partner or invited guest for the 3-way Call:

- Share what to expect and keep it simple. (Less is more)
- Schedule appointment and send text message to confirm call details:
 - Day and Time of call plus the zoom number
 - Share Zoom Number (If new to zoom log on to practice)
- If new, help them think of 3-5 people with whom they'd like to share JP.

Prepare your Success Team Leader for the 3-way Call:

- Schedule appointment and send text message on voxer to confirm call details:
 - Name of Person, Date and Time of Call, zoom number, purpose of call.
- Share what you know: "[Blank Profile Sheets](#)" / "[Example Profile Sheets](#)"
 - Make Verbal Voxer to the Leader of the call at least 24 hours prior to the call.
 - Read /Share from the profile sheets what you know about the person.

2. During the Call: **What to do during a 3-Way Call**

Role of Sponsor / Call Coordinator during the 3-way Call:

- Introduce the New Partner (or guest) to the Leader of the Call
- Edify each of them by briefly sharing what you like, admire and respect about them
- Turn call over to leader, mute your line, let the leader do the talking. (unless asked)
- Your role is to take notes during the call to record later in a voxer chat for that person.

3. After the Call: **What to do after the 3-Way Call**

Sponsor / Call Coordinator Debriefs with Leader:

- Share on Voxer how you felt about the call. Discuss and agree on next steps.

Set Up Voxer Chat Group for the New Partner and Success Team

- Name the Group: "New Partner's Name Success Team" i.e. "Jane's Success Team"
- In this chat group verbally affirm both the New Partner and Success Team Leader
 - Verbally review the next steps discussed and any other planned next steps
 - Type in bullet form the notes taken during the 3-Way Call in this voxer group