

## NEW AGENT CHECKLIST

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### STEP 1 - CONTRACTING

- Complete the Contracting Packet via DocuSign. Email the completed document to your manager.
- Print the Carrier Contracting Check List.
- SureLC/Surancebay emails – after your contracting is approved, you will receive SureLC/Surancebay email for each carrier.
  - Open each email and complete the profile for each carrier.
- After completing the SureLC/Surancebay emails, Text the Carrier Contracting Check List to your manager.

### STEP 2 - GOAL SETTING & SCHEDULE

- Join the Theodore Group email list
- Join the GroupMe app ONLY FOR YOUR REGIONAL MANAGER
- Add Weekly Conference Call Schedule on your calendar
- Review upcoming Theodore Group training events with your manager
- Review your Commission Schedule, Promotion Guidelines and the Lead Bonus Programs
- Set Income Goals and Schedule

### STEP 3 - GET YOUR BAG READY

- Print the In-Home Documents in color and laminate
- Print the [Application Check List](#) and then [Print the Applications](#) for each product. 2 Copies of each application.
  - Applications should be printed black&white and make sure form numbers are visible at bottom.
- Text photo of completed [Application Check List](#) to your manager
- Print the [NEEDS ANALYSIS](#) Worksheet, complete one on yourself and/or family member and text to your Manager
  - Complete an application based on the product recommendation from Needs Analysis submitted above

### STEP 4 – TECHNOLOGY & QUOTERS

- Create shortcut on phone and tablet for the New Agent Training page
- Create shortcuts on phone and tablet for carrier quoting tools.
- Download CFG quoting apps for Term and Final Expense and the FORESTERS quoting app.

### STEP 5 - LEAD SYSTEMS & PURCHASE LEADS

- Log into OPT (must have Contracting Packet approved and completed SureLC/Surancebay emails)
- Set-Up MailCo account
- Review your first lead order with your Manager

### STEP 6 - PHONE SCRIPTS & DOOR KNOCKING

- Print Scripts and sample leads
- Roll play your phone script with your manager

### STEP 7 - IN-HOME PRESENTATION

- Review documents: In-Home Outline and How to Present the Pricing Options
- View the Matt Gibbins In-Home video and the Nick Theodore How to Use the In-Home Documents video
- Download the Living Benefits video to your laptop or tablet