NEW AGENT CHECKLIST

STEP 1 – CONTRACTING (Must have insurance license) (Skip to Step 2 if you do not have your insurance license)

- ☐ RegED AML Certificate
- ☐ E&O Insurance
- ☐ Contracting Profile, Surancebay Emails, Lead Access (3 tasks listed in Step 1 on training site)
- ☐ Print Carrier Contracting Check List on Theodore website
- ☐ *Text photo of completed Carrier Contracting Check List to your manager

STEP 2- GOAL SETTING & SCHEDULE

- ☐ Add Weekly Conference Call Schedule on your calendar
- ☐ Learn how to Earn Free Leads
- ☐ Set Income Goals & Schedule
- ☐ Join the Theodore Group Email List, Sales Leaderboard App, and RM Team Communication

STEP 3- GET YOUR BAG READY

- ☐ Print the Application Check List and then print the applications for each product (STEP 1 must be completed first)
- ☐ *Text photo of completed Application Check List to your manager
- ☐ Print Underwriting Grids, Product Tables, and In-Home Tools
- ☐ Print the NEEDS ANALYSIS Worksheet

STEP 4- TECHNOLOGY

- ☐ Create shortcuts on phone and tablet for carrier quoting tools
- ☐ Download CFG quoting apps for Term and Final Expense

STEP 5- ACCESS LEAD SYSTEMS & BUY LEADS

- ☐ Request access to OPT (must be contracted, refer to STEP 1 if not already completed)
- ☐ Do NOT pay for OPT upgrade-choose option that says not interested
- ☐ Set-Up MailCo account
- ☐ Review your first lead order with your Manager

STEP 6- PHONE SCRIPTS

- ☐ Print phone scripts
- ☐ D Lead & Final Notice Mailing training
- ☐ Attend Live Dial Zoom Sessions on Wednesdays and Saturdays to develop skills

STEP 7- IN-HOME PRESENTATION

- ☐ View In-Home Presentation videos
- ☐ Attend Bill Martin's Jumpstart training webinar – Every Wednesday 11am EST