

NEW AGENT CHECKLIST

STEP 1 - CONTRACTING

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

STEP 2 - GOAL SETTING & SCHEDULE

- Join the GroupMe app ONLY FOR YOUR REGIONAL MANAGER
- Join the Theodore Group email list
- 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
- 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 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