NEW AGENT CHECKLIST – Virtual Sales

STEP 1 - CONTRACTING

- ☐ Complete the Contracting Packet via Docusign. TEXT your manager when you are completed the Packet via DocuSign.
- ☐ Print the Carrier Contracting Check List.
- ☐ SureLC/Surancebay emails – after your contracting is approved, you will receive a 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 your Commission Schedule, Promotion Guidelines and the Lead Bonus Programs
- ☐ Set Income Goals

STEP 3 – SALES TOOLS & UW DOCS

- ☐ Set-up your email signature and create your Whereby account
- ☐ Print the Presentation Tools, Product Tables, and Underwriting Grids, Height & Weight Charts.
- ☐ 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 – QUOTERS & E-APPS

- ☐ Create shortcuts and bookmarks on your phone and tablet/computer for carrier quoting tools.
- ☐ After you complete the SureLC emails, in about 1-2 week, you will receive welcome emails from each carrier, be sure to create login credentials for the carrier's agent website and make sure you can access their e-apps.
  MAKE SURE YOU READ THE CARRIER EMAILS AND SAVE THE EMAILS.
- ☐ Review the **Carrier Info** page:
  - Print the "Carrier & Product List" document.
  - Watch the video "How to View Writing Numbers"
  - Review the "E-App Training"

STEP 5 - LEAD SYSTEMS & PURCHASE LEADS

- ☐ Create your account with Integrity lead Center (ILC)
- ☐ Set-Up MailCo account
- ☐ Review your first lead order with your Manager

STEP 6 - PHONE SCRIPTS

- ☐ Print Sample Leads
- ☐ Print the Dial Tracker
- ☐ Print "Phone Script-IVR" – this is the main phone script when dialing leads to book appointments.
- ☐ Roll play your phone script with your manager
- ☐ Get on the Daily Dial Sessions to watch agents live dial and book appointments

STEP 7 – RUNNING APPOINTMENTS

- ☐ Print the Virtual Sales Script and How to Present Prices to Clients
- ☐ View the Needs Analysis training video
- ☐ View additional Sales Training videos.