Training

Click on the green "Run Process" button and then save the link to save your progress as you complete each step. Click on the plus sign (+) next to each step for a description on how to accomplish the task at hand. You've got this

- [ ] Watch First 90 Days video

  What to expect in your first 90 days as a new agent with Jessica Powers & John Gavin

  Click here to watch the video

  Mark this step as complete once you have watched the video.

- [ ] Are you looking for an office near you?

  ➡Shawn Meaike going over Workspots

  ➡ Click here to find an office near you

  ➡ Also, check out https://workspots.org/ to get involved with our $99 per month program that allows access to any office nationwide. Only accessible via phone.

  The first time you use it, it will pay for itself. It will also provide a 50% discount on lead purchases in the CRM throughout the week. Stay on the lookout.

- [ ] Use The Tool Box

  Click here for **ToolBox**

  Save this link for future reference

- [ ] Complete in Tools of Trade: Introduction, Weekly Trainings and Leads

  Go to Tools of Trade: Go over the introduction, weekly trainings and CRM Guide in the tools of the trade to get plugged in to the team and familiarize yourself on the different type of lead options.

  ➡Click here for Tools of the Trade

  Mark this step as complete when you've reviewed the CRM Lead Guide.

- [ ] Complete in Tools of Trade: All "Print" sections and "Sign-up: Underwriting Guide" **This is where you get your scripts and in home documents**

  Click here for Tools of the Trade

  Make sure to print all the provided documents and sign-up for the Underwriting Guide app. These will help you book appointments and in the home.

  Mark this step as complete as soon as you have printed the documents and signed up for the app.

- [ ] Watch Improving your Dialing and Phone Strategy video

  Click here to watch the video

  Phone objections

  Phone training

  Mark this step as complete once you have watched the video.

- [ ] Buy leads

  Your mentor will have discussed leads with you during your Start Selling strategy session.

  Part-time: Minimum budget advised is $500

Full-time: Minimum budget advised is $1,000

Top Lead Vendor Options:

Happy Agent

Gametime

Social Insurance Leads

Sales Hammer

You can also revisit the leads: CRM guide in Tools of the Trade.

 Mark this step as complete once you buy leads.

- [ ] First Dial Day

You've got this! If you book any appointments before your contracting is complete, your mentor will set you up with paper applications.

Don't forget to use your accountability tracker every dial session so your mentor can help assess your progress.

 Mark this step as complete as soon as you've had your first dial day.

- [ ] Watch 8 Steps to Final Expense video

Paul McClain goes over the key 8 steps to any final expense appointment.

 Click here to watch the video

 Mark this step as complete once you have watched the video.

- [ ] Watch Unhealthy Clients and Other Objections video

Matt Smith & Brad Allen go over how to sell to unhealthy clients and objections.

 Click here to watch the video

 Mark this step as complete once you have watched the video.

- [ ] Review In-Home Printables in Tools of Trade

Go to Tools of the Trade and review these sections:

 Underwriting Guide

 Financial Inventory Sheets

 In-Home Visual Aids

 Policy Summary

 What to Have it Your Bag

 In-Home Agenda

Americo E-app

 Mark this step a complete when you complete your review.

- [ ] Order business materials

Important: Do not let this slow you down-improvise until you get your stuff. The most important thing is to get on the phones quickly.

Business cards

Policy summaries

- Door knocking slips (ffl website)
- Badge (ffl website)
- FFL Shirt (ffl website)

You can review this section in Tools of the Trade. We recommend VistaPrint for all of your printing needs.

Remember, you just need enough to get started and you can ALWAYS make changes the next time your order if you want a different style.

 Mark this step as complete when you have placed your order.

- [ ] Review all content from In-Home Prep

 Review the In-Home Prep section and **mark this step as complete** once you're done.

- [ ] Prepare questions about your in-home experience and what you'd like to learn

Write down any question you have for your mentor about your in-home experience so they can answer them.

 Mark this step as complete once you've written down your questions.

- [ ] Determine how much you will invest in your next set of leads

Our most successful new agents reinvest at least 50% of what they've earned back into their leads. Decide how much you will invest in your next set of leads.

 Mark this step as complete when you know how much you will spend on your next set of leads.

- [ ] Tools of the Trade: Resource

Review the additional resources available on page 2 of the Tools of the Trade

http://www.aspireffl.com/tools

Make and Share Free Checklists
checkli.com