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

Step 1: Strategy and Preparing (as soon as contracting is submitted)

- [ ] Schedule your Start Selling strategy session with your mentor

Once you have reviewed all materials in this section, you're ready for your Start Selling strategy session.

If **Jessica** is your direct mentor, use the link below to schedule this Zoom.

➡ Click here to schedule your Zoom

If **Chadwick** is your direct mentor, use the link below to schedule this Zoom.

➡ Click here to schedule your Zoom

If **someone else** is your direct mentor reach out to them directly ASAP to schedule this Zoom.

Mark this step as complete as soon as you have scheduled your Zoom.

- [ ] 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.

- [ ] Complete New Agent Bootcamp

Click here for Bootcamp

Mark this step as complete when you have completed Bootcamp

- [ ] 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.

Step 2: Phone Validation (immediately after your Start Selling strategy session)

- [ ] Schedule your Phone Validation session with Mentor

Once you have reviewed all materials in this section, you're ready for your Phone Validation strategy session with your Mentor.

If your mentor is **Jessica** use the link below to schedule this Zoom.

➡Click here to schedule your Zoom with Jessica

If your mentor is **Chadwick** use the link below to schedule this Zoom.

➡Click here to schedule your Zoom with Chadwick

If your mentor is **someone else** reach out to them ASAP to schedule this Zoom.

Mark this step as complete as soon as you have your Zoom.

- [ ] 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.

Step 3: Start Dialing (immediately after your Phone Validation)

- [ ] 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:

CRM leads

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.

- [ ] High Importance: Sign up for several live dial coaching sessions

This is a MUST to be successful in this business. The phones are 80% of what we do. Become a master at the phones quickly.

➡Click here to sign up for live dials

Mark this step as complete once you have signed up for at least 2 live dial coaching sessions.

- 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.

Step 4: In-Home Prep (before your first run 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.

Step 5: In-Home Review (after your first run day)

- [ ] Schedule your In-Home Validation session with your Mentor

Once you have reviewed all materials in this section, you're ready for your In-Home Validation strategy session with your Mentor.

If your mentor is **Jessica** use the link below to schedule this Zoom.

➡Click here to schedule your Zoom with Jessica

If your mentor is **Chadwick** use the link below to schedule this Zoom.

➡Click here to schedule your Zoom with Chadwick

If your mentor is **someone else** reach out to them ASAP to schedule this Zoom.

 Mark this step as complete as soon as you have your Zoom.

- [ ] 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 on your In-Home Validation session.

 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 before your In-Home Validations session with your mentor.

 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