**VIRTUAL NEW AGENT CHECKLIST**

**STEP 1 - CONTRACTING**

◻ Complete Reg ED Anti money laundering test (30 min) so you can upload to the contracting packet

◻ Complete the Contracting Packet via DocuSign. Email the completed document to your manager.

◻ SureLC/Surancebay emails – after your contracting is approved, you will receive SureLC/Surancebay emails 24-48 hours later for each carrier and **separate emails for American Amicable and GPM Life**

◻ After completing the SureLC/Surancebay emails, Text your manager.

**STEP 2 - GOAL SETTING & SCHEDULE**

◻ Join the Theodore Group email list and Join the GroupMe app

◻ Add Weekly Conference Call Schedule on your calendar **(Start to jump on 8 am-9:30 am Dial Sessions to listen and learn)**

◻ Review your Commission Schedule, Promotion Guidelines and the Profit Sharing Program

◻ Set Income Goals, Schedule, Review Profit Calculator & **watch the videos about goal setting and send the 10 goals to your manager!**

**STEP 3 - GET ORGANIZED**

◻ Download the In-Home Documents for easy access (one drive/google drive/create folder on computer)

◻ Print 10-20 copies of needs analysis & Download Height/weight chart, underwriting grids, and product tables

◻ Set up free whereby account and Set up Email signature **TEXT YOUR MANAGER TO SET UP A CALL**

**STEP 4 – QUOTERS**

◻ Create shortcut on phone and/or computer for the Carrier Quotes page (baseshoptraining.com/carrier-quotes)

◻ Download CFG Term, CFG Final Expense, Forester, and Aetna on phone or tablet because have an app to run quotes as well.

◻ Set up free insurance toolkit (This toolkit is a backup. Texting Needs analysis to manager is protocol)

**STEP 5 - LEAD ACCESS & LEGACY SAFEGUARD**

◻ Set up Lead Center account (If you receive an error message email leads@equisfinancial.com and cc your manager

◻ Set-Up MailCo account & Register and learn about Legacy Safeguard

**STEP 6 - PHONE SCRIPTS**

◻ Print Scripts, Dialing objections, and 10 copies of dial tracker to use on each dial session

◻ Watch Matthew Gibbons and Brady live dial videos

◻ Review the 5 touches for contacting leads. (Triple dial, Triple dial, Voicemail, Text, Final Notice)

◻ Learn about the final notice system **TEXT YOUR MANAGER TO SET UP ANOTHER CALL**

**STEP 7 - VIRTUAL PRESENTATION**

◻ Print Outline, how to show numbers and in home bullet points

◻ View the Matt Gibbons In-Home video for reference on how an appointment will go

◻ Watch the 5 virtual presentation videos that are recommended

◻ Watch How to set up yourself for Zero Objections

◻ Watch Pete Beckman explains critical time period

**WHATS NEXT & E APP TRAINING**

◻ Read the 11 points on page and watch the e app training videos

◻ Review your goals and promotion guidelines again **TEXT YOUR MANAGER TO SET UP ANOTHER CALL TO GAME PLAN LEADS**