



# New Agent Playbook

**2025 Version**



# EMPLOYEE BENEFITS

## Why Xperience Benefits?

- Unlimited Advice and Consultation for the Business
- Benefits Education and Counseling for the Employees



### Health Insurance

Protects your employees from paying the full costs of medical services when they are sick or injured



### Dental and Vision

Makes it easy to go to dentist and vision providers by minimizing out-of-pocket costs for routine dental check-ups and expensive procedures



### Life Insurance

Pays out a sum of money either on the death of the insured person or after a terminal illness diagnosis



### Supplemental Benefits

Pays cash directly to the employees when they get sick or injured



### Legal Benefits

Affordable access to legal benefits and identity theft protection



- ★ Manage the Rising Costs of Healthcare
- ★ Attract and Retain Quality Talent
- ★ Payroll and PEO Solutions Available



# Our Recommended Benefits Strategy

## Your goals are our goals

1. Communicate the full value of benefit options available to all employees.
2. Enroll your employees with technologies that seamlessly integrate with your existing systems.
3. Reduce expenses associated with enrollment, including materials, administrative overhead and IT costs.
4. Boost tax savings by educating employees on Section 125 plans and participation.
5. Drive benefits engagement and assist employee recruitment and retention.



We will deliver quality, flexible coverage and comprehensive customer service throughout the enrollment journey.

## Delivering on Your Priorities

**By meeting these goals, we'll address your top business priorities:**

### Managing rising health insurance costs

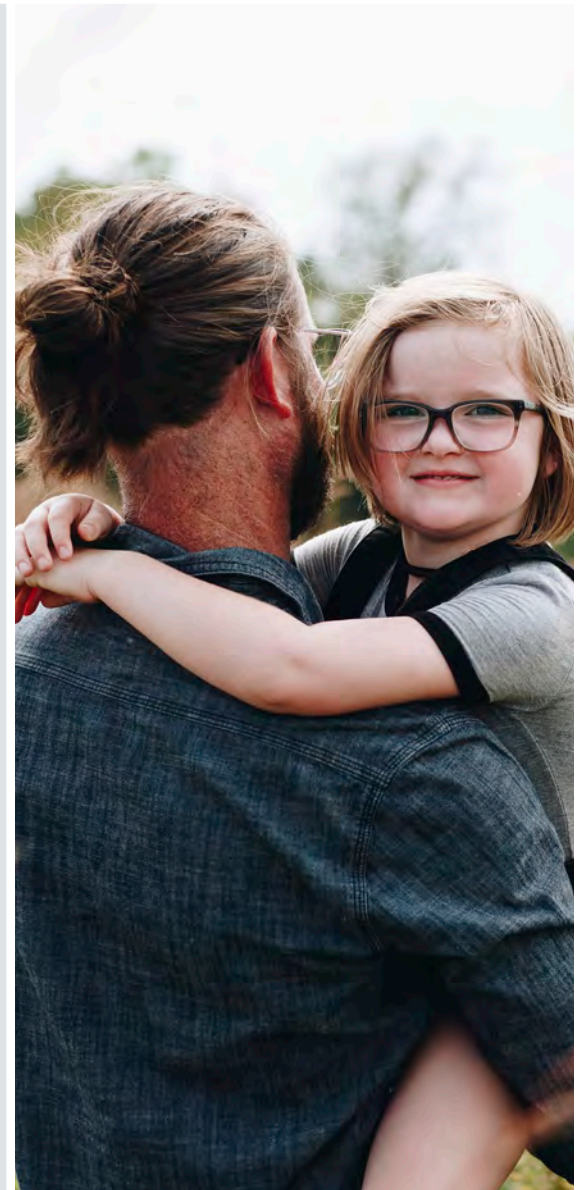
Our health and wellness benefits help protect your employees' quality of life while helping you manage rising insurance costs. They fill critical gaps in medical coverage and help you contain benefit costs using programs like dependent verification services.

### Retaining your employees

You work hard to provide meaningful benefits for your employees. It's time for those benefits to work hard for you. Our benefit solutions help you retain high-performing employees with comprehensive protection and benefits.

### Enhancing your recruiting

We're committed to helping you grow your business. That's why we offer high-quality benefits and protection that enable you to recruit the best and the brightest.





## New Agent Onboarding and Training

### Phase 1 - New Agent Onboarding

- ☐ Google Workspace Training: Create Gmail account (firstnamelastname.xperience@gmail.com)
- ☐ Enroll in Xperience Benefits Academy
- ☐ Present New Agent Game Plan - Success Playbook
- ☐ Introduce Xperience Benefits Colorado website
- ☐ Weekly Schedule - 168 Hours Activity and Add to Calendar Invites
- ☐ Calendly Scheduler Training
- ☐ 30 Second Elevator Pitch Training

### Phase 2 - Qualify Leads and Prospecting

- ☐ Elevator Pitch Training and Completion
- ☐ Make a List
- ☐ Qualifying Leads
- ☐ Scheduling Appointments
- ☐ Overcoming Objections

### Phase 3 - Product Training and How to Close New Groups

- ☐ Health Insurance
- ☐ Dental and Vision
- ☐ Supplemental Benefits
- ☐ Employer Strategy Presentations
- ☐ Employee Education Presentations
- ☐ How to Close a New Group
  - ☐ Schedule Open Enrollment
  - ☐ Schedule Employee Education Meeting
  - ☐ Schedule Benefits Counseling sessions
- ☐ How to Inspire Employers to Invest in Benefits
  - ☐ Health Insurance
  - ☐ Benefits Bank

# Productivity Worksheet



## 2-Minute Rule

If a task takes less than **2** minutes to complete, do it right away.



## 5-Second Rule

Count backwards **5-4-3-2-1** and just force yourself to take action. This helps to overcome the initial resistance to starting.

## 1-3-5 rule

At the start of each day, identify:  
**1** big thing to accomplish,  
**3** medium things, and  
**5** small tasks.



## Pomodoro Technique

1. Set a timer for **25** minutes and focus on one task.
2. After the timer rings, take a **5**-minute break.
3. Repeat this cycle four times, then take a longer break of **20-30** minutes.

This is based on the idea that frequent breaks improve mental agility and maintain your focus on the task at hand.

## 80/20 Rule



**20%** of your efforts give you **80%** of the results. So focus on that **20%** of super important stuff first. .

By focusing on high-impact tasks, you can achieve more with less effort.

## Break Tasks Into Pieces



You'll feel less overwhelmed and more motivated to tackle each part of the task.



## Eat the Frog

Tackle your most challenging task **first** thing in the morning.

By completing your hardest task early, you build momentum for the rest of the day.



## "Not To-Do" List

Identify tasks or activities that are not essential or that can be delegated, and **stop** doing them.

This frees up time and energy for more important tasks.

## Eliminate Multitasking



Focus on **one** task at a time to improve concentration.

List 3 concepts that can help you grow your business:

1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_



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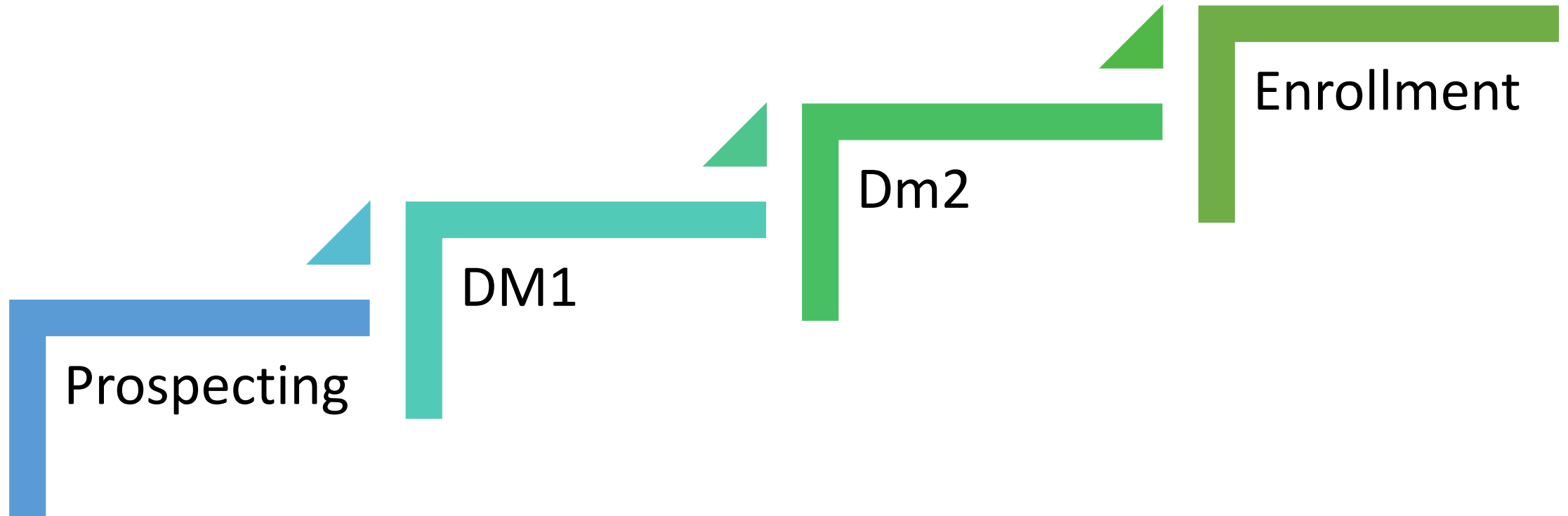


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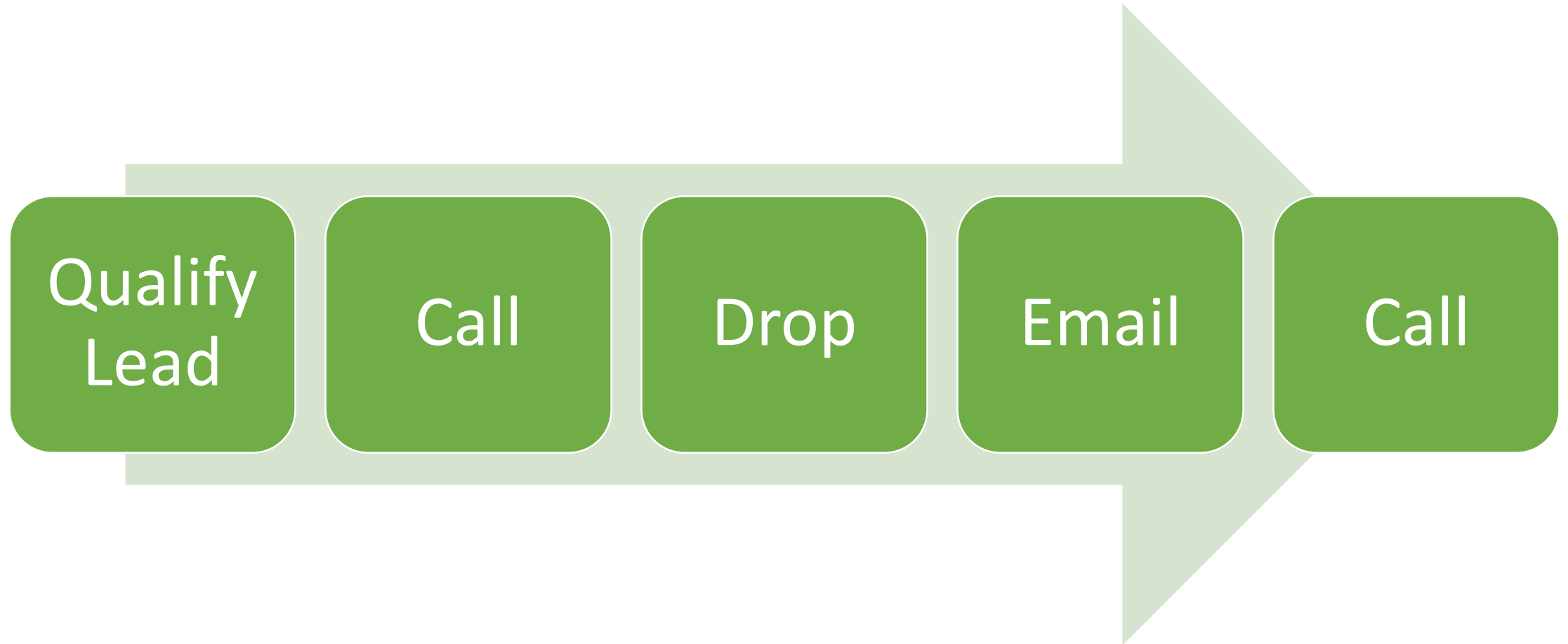
# CLIENT PROCESS



# Sales Process



# Prospecting – Weekly Flow





## How to Create a Great Elevator Pitch

### Introduction:

It takes 7 seconds to create a first impression and you only get 1 chance.

### Elevator Pitch: (30 seconds or less)

- Do NOT mention your company or product.
- Do NOT mention WHAT you do or HOW you do it.
- DO Mention WHO you can help and WHY you do what you do.

### Creating Your Own Introduction: (Brainstorming Activity)

1. What are some things you love most about what you do? (at least 4 things)
2. What strengths or skills do you have that come easy to you? (What are the problems you can solve, that only you can solve?)
3. Flashback to childhood - what were you great at when you were young? (Was there a defining moment that made you who you are today? How does this translate to your business?)
4. Beyond the title - What is it you would like to be known for? (If you retire today, what would you hope would be your last impression? (Don't just say "I helped people" or "I was a nice person." This has to be COMPELLING. BIG PICTURE, MAJOR IMPACT!)

### Here are my answers: (for example)

- Freedom, Unlimited Income Opportunity, Real Career, Challenging
- Bold, Confident, High Energy, Fearless, Thinker but also Action Oriented. Nobody works harder than me! None of the products we sell are proprietary, at the end of the day its all burgers, shakes and fries. At the end of the day, the biggest differentiator my clients and partners get, is ME!

- I was shy, timid and lacked confidence. I always had high energy and was consistent. Eventually, the energy and consistency created great results which built more confidence and more fearlessness.
- I want to be known for revolutionizing a broken industry by bringing a higher level of service and education for local businesses to help them attract more clients, inspire their employees and grow their business.

### **Extra Tips: (Options for openers for Elevator Pitch)**

- Start by asking a question
- Be Funny
- "I am really passionate about X" or "What excites me most is Y"

### **Next Steps: (Execute and Adjust)**

Practice and Feedback:

- Practice your elevator pitch with 5 trusted people.
- A few days later, ask them what they remember about it.
- This will help you understand if you are standing out or not.

Create different elevator pitches for different audiences.

Here is my elevator pitch:

My name is Bryn Reid. I am revolutionizing a broken industry by bringing a higher level of service and education to their employees. I am passionate about helping local businesses attract more clients, inspire their employees and grow their business.

**Have fun, and have patience!**



## Appointment Setting Call Script

Call Script: Hi my name is Bryn Reid and I'm a benefits consultant with Xperience Benefits. We help local businesses enhance their employee benefits by improving their service and education. Best part is, our services are available at no cost. Have you heard our name thrown around before? (wait for answer, they will likely say no)

"We are the premier Employee Benefits Company in (state where you live).  
I have a couple quick questions..."

1. Do you currently offer employee benefits to your employees?
    - a. If no, ask why not (and listen to answer)
    - b. If yes, move to #2 (below)
  2. How would you rate your current benefits program?
    - Education for your employees?
    - Cost of healthcare?
    - Service for you and your employees?
- Which day this week is best for you to carve out 20 minutes to learn more about your company to decide if you may be a good fit for partnership?
- We are centrally located in the (Denver Tech Center), we can reserve a conference room at our office or we can come to your office. Which location do you prefer?
- Important: after you agree on date, time, location tell the client you will send a calendar invite and confirm email address, phone number and preferred method of contact.

Overcoming Objections:

- We already have benefits.
- We can't afford it.
- We already have a broker.

Response: Great! Thank you for sharing. As a matter of fact, some of our best clients already (have benefits, can't afford it, have a broker). Let's schedule a quick discovery meeting. If it's for you great, if not great.

Any other objections: "That's a great question, we will discuss that in our next meeting."



# Quick Discovery Flow Chart

## “Do you currently offer benefits?”

### Yes.

That's great! What benefits do you offer?

- How is the service from your broker and education for the employees?
- What does a world class benefits program look like to you?

Statistics show companies that offer benefits have higher retention and productivity from their employees. If we do all the heavy lifting and help you build a great program at no cost would you be interested?

### No.

Why don't you offer benefits?

- Can't afford it - if you could offer benefits on a zero budget would you be interested?
- Too many headaches - if we do all the heavy lifting and help you build a great program at no cost would you be interested?
- Nobody interested - we have found that half the company won't be interested no matter how great the benefits are, but let's focus on those who may possibly be interested.

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