

10 Steps To Success

Objective: To become pro-efficient in helping clients become properly protected, debt-free and financially independent.

1. Orientation with Field-Trainer

■ Download app and log into POL

2. Complete Field-Training first 14 days in mastering setting appointments by following the script. 10 appointments of shadowing.

Name	Phone #	Date	MACHO
			Yes/No
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2.			
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4.			
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10.			

Trainer Signature

Trainee Signature

3. Financial Plan practice

■ Do your own Financial Plan

4. Get Senior Health and non-life products certified. It takes only a few minutes by watching a short video.

Instructions:

-Log into POL

-Go to “Products” tab at the top

-Select a product

-click on “Licensing” on the left to view requirements and/or steps for your state to become certified.

■ Senior Health

■ PLPP

■ Primerica Secure (Auto & Home)

■ Vivint

Trainer Signature

Trainee Signature

5. Life-Only Agent Licensed

- Complete class requirements for your state (online, zoom, or in-person)
- Pass the test
- LiveScan fingerprints

Trainer Signature

Trainee Signature

6. Role play with Field-Trainer

Trainer Signature

Trainee Signature

7. Practice submitting a life application on POL

- Submit a practice life application.

8. Master presentation, referrals. Set 5 appts from referrals or list with Field-Trainer shadowing you.

NAME:

DATE:

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2.

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5.



Congratulations! You are now an independent, licensed Representative!

Trainer Signature

Trainee Signature

9. Study and pass investment licenses:

☐ SIE

☐ 6

☐ 63

Trainer Signature

Trainee Signature

10. Become a Field-Trainer by teaching someone else master the first 10 steps.

Positions/Promotions

Representative 25% contract level:

-when licensed

Senior representative 35% contract level:

-3 recruits **or** \$3,000 in annual premium within a month or before licensed

District Leader 50% contract level:

-3 recruits **and** \$3,000 in annual premium within a month or before licensed

Divison Leader 60% contract level:

-6 recruits **and** \$6,000 in annual premium as a team within a month (2 recruits and \$2,000 in annual premium must be personal) **or** 1 million dollars in assets under management

-5 licensed agents

-1 District Leader

Regional Leader 70% contract level:

-8 recruits **and** \$8,000 in annual premium as a team (2 recruits and \$2,000 in annual premium must be personal) **or** 2 million dollars in assets under management

-10 licensed agents

-3 District Leaders

-series 6, 63 licensed

Regional Vice President 110% contract level:

-10 recruits **by** \$10,000 in annual premium as a team 3 months in a row without the leading agent

-20 licensed agents minimum

-5 Districts, or 2 Divisions, or 1 Regional Leader team as a replacement

-Series 6, 63, 26 licensed

Marketing Plan

Married (or divorced) Age 25-55 Children (18 Yrs and younger) Homeowners Occupation

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Appointment Setting Script

Hi..... just wanted to see if you can help me out. (WFA) I just started working with a financial services company and I'm in the process of getting my licenses out of the way. In order to do so, I need to complete my field training the next 2 weeks. Can you and.....give me 30 minutes of your time? We will do a zoom appointment with my field trainer and he/she will teach me how to run presentations and answer questions if you might have any. ***This is just for my training and no obligations from you. Can you help me out?***

Which days are better for you, weekdays or weekends?
Mornings or afternoon?

Possible objections:

"What is it that you do?" Answer: We deal with all aspects of finances. -> **Do not talk about products!**

"Are you going to try to sell us something?" Answer: Last sentence of the script.

"We are good, we don't need anything, but thank you." Answer: Last sentence of the script.

"Oh we have already a financial guy/gal." Answer: Last sentence of the script.

Training Goals and fastest way to success in first 30 days:

-10 Field training observations -> SETTING 16 based on company standards

8 Appointments set **5** Kept **3** Life clients **1** Recruit

Results:

- ☒ District Leader Promotion (\$3,000 in premium -> 3-5 life insurance clients and 3 recruits)
- ☒ 600 bonus minimum
- ☒ 15-30 referrals
- ☒ 3-5 non-license products \$250 (Senior Health, Vivint, identity theft protection, auto & home insurance, legal protection).
- ☒ go to PFSU and complete insurance class

Meetings and Trainings: (Pacific Time) on Zoom

Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
5:00pm Training	6:00pm Opportunity Night	5:00pm Training	5:00pm Training	5:00pm Training	5:00pm Training