

NEW AGENT SUCCESS CHECKLIST

Agent Number: _____

Trainer Phone/Email: _____

DAILY CHECKLIST

- **Practice** Practice your Sales Talk every day - keep a copy on the front seat of your car & practice in evenings
- **Read** Read something positive in the AM or lunch break (Greatest Salesman, Common Denominator, etc.)
- **Audios** Listen in the AM and throughout the day (B2B CT Audios, motivational audios, and sales training)
- **Goal Card** Break day down into bite sized 2-hour chunks & record stats as you work (calls, demos, FP, high fives)
- **Check-Ins** Call, text, or vox your trainer **daily** with questions or to share good news!
- **Self-Talk** **Positive** ("Today I will improve the lives of 30 people just by stopping in & saying hi because I'm that awesome!!!")
- **In The Field** **Treat people better than well and engage them** – whether it's a handshake, high five, etc.
Get sharable cancer stories
Share our career opportunity
Collect business cards and ask for referrals from EVERYONE you meet and talk to

WEEKLY CHECKLIST

- **Calls** Training, fun, good news, connecting with the ABG or FHL family across the country!
 - **ABG Call** MON @ 8 am MST (9 am CST / 10 am EST) (712) 832-8330 PIN: 7524424#
 - **Legacy Call** WED @ 7 am MST (8 am CST / 9 am EST) (712) 832-8330 PIN: 7524424#
 - **New Agent Call** FRI @ 8 am MST (9 am CST / 10 EST) (312) 586-7177 No PIN
- **WBRs** Weekly Business Review with direct manager (one hour to review your week, talk over goals, etc.)
- **Demos** 25-30+ Demos in a week
- **Hours** 9-10 hour days (Mon-Friday)
- **FPs** Protect 3+ families or do your best to (50+ hours for week/25+ demos for week)
- **Transmittals** Send in New Business with TRANSMITTAL SHEET (one per payment style and per state written in)
 - Faxed Apps, E-Apps submitted to FHL Home Office by Tuesday @ midnight EST
 - Paper Apps mailed in to Home Office by Wednesday @ noon EST
 - *FHL Home Office Address: 6001 E. Royalton Rd. Suite #200 Cleveland, OH 44147*
 - All pends need to be cleared by Wednesday at 1:00 PM EST (to count for the previous week's business)
- **IMPORTANT NUMBERS**
 - Fax # for Business** 1 (844) 325-6520
 - Fax # for Pends** 1 (440) 922-5215
 - FHL Main Agent Line** 1 (440) 922-5252

DRAW QUALIFICATION CHECKLIST (if on the draw):

- **WGP sent to Rob & Trainer by Sunday night** (with written controllable goals and accountability)
- **Stats entered daily into stats website** (or sent to Trainer if website is down/login inaccessible)
- **1+ Sale Per Week - minimum of \$800 GAP**
- **25+ Closing Demos Per Week**

How to enter STATS* ("login" menu on www.abgpartners.com or www.legacystatssite.com)

- **Do it EVERY work day/night that ends in Y!!**
- **Contacts = total number of sales calls that day, whether it resulted in an Intro, a Demo, or nothing**
- Each written policy counts as a Family Protected (FP). So if 1 Demo results in 2 Policies written, it equals 2 FPs.
- **Calculating GAP: if you sold 3 policies in a day with monthly premiums of \$61, \$146 and \$50 each, your GAP would be calculated as follows:**

$$\begin{array}{r} 61.00 \\ + 146.00 \\ \hline 50.00 \\ \hline \$257.00 \end{array} \rightarrow \rightarrow \$257.00 \times 12 \text{ months (annualized)} = \mathbf{\$3084.00 \text{ GAP}}$$

NEW AGENT \$\$ BONUS:

- **ABG Quick Start Bonus \$100** if you write a Builders Week (\$2,500 GAP) between the time you get out of SA on Thursday and your first Monday morning out in the field the next week.
- **FHL New Agent Quick Start Bonus for 2017 \$1000** if you write \$10K GAP in your first 4 weeks in the field and complete 4 FIT training modules (this new agent bonus incentive may change starting January 2018)