NEW AGENT Checklist: **Self Study**

SELF STUDY OUTLINE: *Review this tab before moving to the tabs that follow with training!*

APPS TO PRINT:		**Download/Print**	**HOMEWORK**	**Date/T**
◯ **HAVE ACCES** to ALL applications	→	Applications for Carriers	□ Read thru each application at least once before meeting with clients, so you are familiar with them.	
*Pro-Tip: Save applications to a thumb drive and take to Kinkos or Office Depot/OfficeMax near you and use their ink and paper. You'll save a fortune in supplies and time!			□ Organize in folders for quick access	
PRINT or Save PDF applications to computer if only tele-selling				

SHORTCUTS TO SAVE:		**Download/Print**	**HOMEWORK**	**Date/T**
◯ **ADD** Zoom Meetings to Your Calendar	→	Zoom Meeting List - watch CREW notices for changes	□ Plug into meetings; post takeaways in Crew	*ongo
			** Pro-tip: Set meetings as repeating events in your calendar **	
◯ **SAVE** Quoting site Short Cuts	→	For computer & phone	□ Organize computer desktop so they're easily accessible using folders and browser bookmarks	

PHONE TRAINING ASSIGNMENT:		**Download/Print**	**HOMEWORK**	**Date/T**
Part A - Learn Phone Scripts				
◯ **WATCH** Webinar Phone Script ***VIDEO***	→	TeleSelling Phone Script	□ MEMORIZE TeleSelling Appointment Setting Script FIRST	
* Note the script has changed however all training on script delivery applies to the current script			□ Repeat the script out loud 20 times	
			□ Record the 1st & 20th time; SEND TO UPLINE	
	→	Contact Metric Ratios	□ Post nearby to reference during Dial Time	
	→	Client Qualification Form	□ Use during Dial Time when appt setting	
	→	Activity Report Form	□ Review w/Upline to track progress during Dial Time	

PHONE TRAINING ASSIGNMENT (cont.) :		**Download/Print**	**HOMEWORK**	**Date/T**
Part B - Phone Objections				
◯ **WATCH** Objections ***VIDEO***	→	Objections - 19 total	□ Have a clean copy ready for Dial Time	
◯ Put the 19 Objections on **CUE CARDS**			□ SEND photo of cue cards to Upline	
Pro-Tip: MASTER THESE! You need to know these backwards and forwards - 100%! Most new agents don't take this serious enough, yet this is the one area that can make or break an agent from successfully booking an appointment. Write them out, recite them, record yourself			□ MEMORIZE - work on 2 a day until you have them down	

	and listen on a loop, have friends/family test you until you'd score 10/10!		

Tele-Selling Script TRAINING ASSIGNMENT:		Download/Print	HOMEWORK	Date/T
◯ Download the Tele-Selling Power Point and Customize				
◯ Part 1 - Role & Purpose Segment	→	Rapport/ Role & Purpose Script	□ Say script out loud 20x	
◯ Part 2 - Emotion Segment	→	EMOTION Script	□ Say script out loud 20x	
◯ Part 3 - Assumption Segment	→	Assumption Script	□ Say script out loud 20x	
◯ Part 4 - Lock It Down Segment	→	Lock It Down Info	□ Say script out loud 20x; Check in with UPLINE once complete!	
◯ Your "Why" and the Client's "Why"			□ Listen and learn, take great notes	
			□ Write out YOUR "Why" and SEND to your Agency Owner	
◯ Register and Play with the Virtual Mentor Product Selector			□ Register for VIRTUAL MENTOR!!!	
◯ Continuing Education "Why and Showing Plans" ***VIDEO***	→		□ Watch the Video 3 times and take excellent notes!	

NEW AGENT Checklist: **Live-Training**

Live Training Outline: *Review Steps 1-5 in this tab before moving to the tabs that follow it with training!*

LIVE TRAINING & REVIEW: Join the class 10 min early w/CAMERA ON! Be ready to participate		***https://zoom.us/j/2399894347***	Date/T
◯ **Business Planning Live Class**	*** 8pm EST - MONDAY**	***Have all homework from above & below completed before joining these review classes!***	
◯ **Phone Training Live Class**	*** 8pm EST - TUESDAY**		
◯ **Tele-Sales Presentation Live Class - PART 1**	*** 8pm EST - WEDNESDAY**		
◯ **Tele-Sales Presentation Live Class - PART 2**	*** 8pm EST - THURSDAY**		
◯ All-Dialer Warm Up (repeats every week)	* 8:30 EST - Saturday		
◯ Post Dialer Recap	* 11am EST - Monday	For New Agents that have dialed their first time over the weekend	

Buisiness Planning (Monday 8pm EST) :		Download/Print	HOMEWORK	Date/T
◯ ***Part A - Create YOUR Schedule***	→	4 Keys to a Successful Week	□ CREATE Schedule "7 Things To Put On Your Schedule"	
	→	4 Cornerstones	□ Check out "Interested In Building Your Business?" Tab	
	→	SFG Core Values		
	→	Weekly Schedule Template		
◯ ***Part B - Prime Your Mind To Win!***			□ ORDER - The Slight Edge	

Create YOUR Own Policy Tracker:			**Download/Print**		**HOMEWORK**	**Date/T**
◯	**WATCH** the Policy Tracker Training Video		Policy Tracker		□ Save to Desktop and review the tabs	
Advanced Phone Training:			**Download/Print**		**HOMEWORK**	**Date/T**
	First Week Follow-Up & Ongoing Activities					
◯	**M.A.C.C.** - Massive Action Constant Correction	→	* Previously downloaded		□ Send Activity Report to AO/Upline weekly	* Wee
◯	**READING** for Personal Development	→	* Previously ordered		□ Read min 10 pages of a Personal Development Book	* Da
◯	**LISTEN** to Mirand Miller/John Ziller Audio	→	*** AUDIO ***		□ Listen after your first week of dials; send takeaway to Upline/ Agency Owner	
	Step One: Resources & Dials				**□ If you haven't set a goals call w/your AO, do so now!**	
	Step Two: Memorization					
◯	Week 1 - work on objections				□ Objections on Cue Cards - this should already be done!	
◯	Week 2 - work on objections				□ Master the first 10 (2/day)	
◯	Week 3 - test yourself daily				□ Master the remaining ones (1/day)	
◯	Week 4 - continue to work on challenging ones				□ Seriously, TEST yourself DAILY!	
					□ Have them all MASTERED until you rate yourself a 10!	
	Step Three: Continue Training					
◯	Appt Setting Training for Phones	→	Aces of Phone Training Site		□ View 1 before every dial day until all are viewed	
◯	1. START HERE! Metrics of the Phones	→	***VIDEO***			
◯	2. " I Want To Check With My Spouse"	→	***VIDEO***			
◯	3. The 3 Most Common Pitfalls *start 23 min in	→	***VIDEO***			
◯	4. Definite Time & Booking For Next Week	→	***VIDEO***			
◯	5. D & T Progression, Sounding Busy, Def vs Non	→	***VIDEO***			
◯	6. Aces w/Guests: Dave Kushner & Ben Miller	→	***VIDEO***			
◯	7. Call-In Leads Posture	→	***VIDEO***			
	Common Objections - Round Table Calls					
◯	National RT for Common Objection Handling	→	***AUDIO***			
◯	"I'm Not Interested" w/Cicily Newsom	→	***AUDIO***			
◯	Nailing the Intro w/Cicily Newsom	→	***AUDIO***			
◯	"We've Got It Taken Care Of" Round Table	→	***AUDIO***			

◯	Mastering the Phones w/the Masters	→	***AUDIO***		
	How To Recruit: 2 Messages A Day				
◯	Step 1 - Send Text	→	Copy Text		
◯	Step 2 - Share Video	→	Send Video	□ Contact Upline to send additional videos, if needed	
◯	Step 3 - Schedule 3 Way Call			□ Contact Upline/AO to schedule call	
	In Home: WHY and Sharing Plans				
◯	**WATCH** "Digging Into the WHY & Presenting..."		***VIDEO***	□ Write out Your WHY (if you haven't already)	
				□ Practice with Agency Owner "Now" and "Want"	
				□ Practice "Who, What, When, Where, How" questions	
				□ Take good notes; find plans w/in 10% of mtg payment	
	In Home: I Can't Decide Tonight				
◯	**WATCH** "I Can't Decide Tonight"		***VIDEO***	□ Memorize the 2 DECIDE TONIGHT Scripts	
				□ Re-listen to Webinar to really understand MICRO-COMMITTMENTS	
	In-Home: Critical Period & Equity Protections				
◯	Equity Protection (EP) & Critical Period (CP)		***VIDEO***	□ Memorize Miranda's "Is the bank going to pay your mtg"	
◯	EP w/Jim Archer & Grant Leiber		***AUDIO***	□ Memorize Live Vidoe of EP going up and down	
◯	Belief Building on CP w/Guest Miranda's Mom		***AUDIO***	□ Memorize CP story of Law Professor	
	In-Home: Fact Finding				
◯	Fact Finding - Become a Trusted Advisor		***VIDEO***	□ Watch and Re-Watch until you youv'e got it down!	
				□ PRACTICE w/family, friends, upline, etc.	
	In-Home: Don't Do A Medical Exam				
◯	Old vs New and Why Not To Do a Medical Exam		***VIDEO***	□ Watch MULTIPLE TIMES and take great NOTES!	
				□ Practice this OVER and OVER! It will take time to Master.	

sfgagentmentor.com is the main training site for our agency. Here you learn appointment setting, in home presentation, how to build an agency and how to grow yourself!

sfglife.com is the corporate website, and where you go to print the applications. The corporate website is full of resources, for example tl where you'll find SFG logos. Be careful though, it has new agent training on the BEST system for the phones and REAL system for in-home which we have evolved further (we use sfgagentmentor for phone and in-home training).

sfgvirtualmentor.com is the site we use for underwriting. You can request an account by clicking the big magenta button at the bottom of the Sel Study - In Home page of sfgagentmentor.com

SymmetryU is a corporate training website where you did your Fast Track training. There are other training elements on that site that you will use from time to time. To get started, the only thing you do there is the Fast Track.

OPT is another website you will access weekly. This is our CRM system (and your "backoffice") where you order leads, and you upload insuranc applications. Login credentials for OPT will be emailed to you by Corporate. Make sure you save those logins in a good place.